



University of the Philippines  
OPEN UNIVERSITY



**CONVERSATIONS  
ON OPENNESS:**

**AN ENGAGEMENT IN  
DISCOURSE CAPTURE**

**EDITORS**

Melinda F. Lumanta  
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## FOREWORD

Self-reflection, sharing and collective inquiry of the narratives that resulted from observations were the processes which characterized UPOU's journey towards our articulation of Open and Distance e-Learning or ODeL. The series of Round Table Discussions on "Openness in Open Universities" initiated in 2012 by the then Vice Chancellor for Academic Affairs, Dr. Maria Fe V. Mendoza, has provided the venue for the sharing of the various articulations of openness at UPOU at the program and course levels, teaching strategies, and other components of offering learning opportunities in the distance mode of instruction. These articulations were, at that time, just random sound bytes out of self-initiated concretization of openness in the context of UPOU's operations with academic freedom and autonomy, providing the elbow room for explorations.

This book has captured them all: not just the articulations on openness by the UPOU academics but also the hidden thread which connected their various initiatives. More than the content which can guide other HEI's in their own pursuit of openness in education, the book offers a strategy, a method of inquiry, and a mechanism of harnessing individual contributions for the collective development of constructs.

I thank the chapter authors of this book who unselfishly shared their thoughts during the round table discussions and congratulate Dr. Melinda F. Lumanta and Dr. Alexander G. Flor, UPOU's resident experts on knowledge management and discourse analysis, for making this book project possible as well as the other staff of the UPOU Office of the Vice Chancellor for Academic Affairs who took the task of "capturing the discourse".

***Melinda dP. Banadalaria, Ph.D.***

Chancellor, UP Open University

2017



## PREFACE

In 2012, UPOU engaged in a series of roundtable discussions (RTD) entitled, “The Openness of Open Universities.” Intended to be a process of institutional self-reflection, it had the objectives of: identifying and/or clarifying the guiding principles of UPOU in practicing distance education and open learning; creating a venue for intellectual discourse on distance education and open learning; and presenting innovative frameworks for research and practice of distance education and open learning. Selected faculty members and researchers served as *de facto* thought leaders who articulated for the institution emerging views on various aspects of openness. And we are now making a bold attempt at capturing these views.

Through this volume, we introduce an experimental technique cum format that we call *discourse capture*. Inspired by discourse analysis and knowledge management, discourse capture is a knowledge sharing device that presents an exposition of ideas along with contexts and processes of spontaneous collective thought. It capitalizes on the collaborative nature of knowledge and is based upon the assumption that knowledge is collectively discovered, constructed and reinforced by a community of interest through mutual exchanges or so-called conversations. *Discourse capture* is both product and process. The method itself evolved from and was a product of the community’s own heuristic processes. Discourse, by nature, is continuous, endlessly seeking elusive resolutions that are at best temporal, instead of lasting truths, *aere perennius*. Mere segments of discourse can be captured. However, these captured segments when framed within a common context form a dominant narrative within a given space and time.

***Conversations on Openness: An Engagement in Discourse Capture*** encapsulates the UPOU community’s dominant narrative on openness in its pre-MOOC phase. As early as 2012, the institution engaged in a series of roundtable discussions on open curricula, open educational resource,

open access, open admissions and other dimensions of openness in efforts to provide academic leadership in open and distance e-learning in the Philippines. In this book, these discussions are now translated into chapters in the order of roundtable sessions.

Knowledge cannot be removed from its contexts and the processes wherein it crystallizes. In any forum, when novel ideas are shared by one mind with other minds, sparks, indicative of knowledge synergies, fly. These sparks are hardly grasped in transcripts of a talk. The multidimensionality of knowledge is thus lost. *Discourse capture* attempts to faithfully record these thereby documenting and delivering knowledge as discourse.

Based on the assumption that the dominant narrative is collectively shaped by smaller ones, the discourse capture process occurs at two levels: the *supra* and the *sub*. The supra level process has the following elements: a presentation of the *state-of-play* or *lay-of-the-land* by a thought leader; the sub-discourses led by their respective expositors; and a meta-synthesis by an integrator.

Along with the main thought leader's piece and the meta-synthesis, the sub level discourses were assigned one chapter each. The sub level process possesses the following elements: *thought threads* woven in logical or chronological sequence; *expositor(s)* who present(s) the main thought thread serving as the backbone of the sub-discourse; *community members* who introduce and thicken the discursive elements; and a *synthesis* provided also by the expositor(s).

As format, a sub-discourse ideally begins with a description of the *context*. It proceeds with a presentation of the main thoughts offered as structured arguments of the expositor(s). The exposition is the *narrative*. This is followed by a *conversation* between the expositor(s) and community members wherein sub-threads or discursive points are introduced and articulated. It ends with *synthesis and self-reflection* wherein expositors situate the narrative and conversation within the grand or continuing

discourse. The context, narrative, conversation and synthesis and reflection sections make-up the sub-discourse. A meta-synthesized collection of sub-discourses constitutes discourse capture as product.

You will find in this volume, chapters with different interpretations on how the aforementioned elements are structured, ordered and framed, including singular or multiple expositors and direct or indirect attributions to participants in the conversation. Grace Javier Alfonso in *Thoughts on Openness in a Digitized World* set the context in which the University finds itself in the digital age. Through an Open and Distance e-Learning (ODEL) worldview, she presents current issues on openness and she challenges the University to keep the discourse going and explore innovative ideas and approaches.

In the sub-discourse, *The Invisible Teacher*, Alexander G. Flor argued that faculty members of open universities can become effective educators while being minimally invasive of the online student's learning space. The sub-discourse by Ricardo T. Bagarinao, *Open Admission: Rethinking the Use of Admission Criteria in Degree Programs* asserted that open universities should be more flexible, open, and inclusive with a strong student support system to ensure the highest chance of success and provide equal opportunities for its diverse students. In *Possibilities for Recognition of Prior Learning in Open Education*, Maria Mercedes E. Arzadon pointed out that in open education normative perspectives are often disrupted and in the case of recognition of prior learning (RPL) she explored different practices which may have applications in open learning. Cesar Z. Luna, discussed the multiple entries and exits continuum in his sub-discourse entitled *Multiple Entries and Exits and Open Curricula* and argued for increased adoption of such practice. Marie-Sol P. Hidalgo in her *An Exploration of Open Curriculum in the Context of Social Transformation*, argued that the curriculum is a means of initiating individuals into a community of practice and as such an open curriculum needs to be flexible and adaptable. The sub-discourse on *Pedagogical Models in Open and Distance e-Learning* includes two narratives. The first

one, *DE Models* by Patricia B. Arinto, presented the cohort and self-paced models of learning and proposed that the university adopt as many learning models in the spirit of openness and flexibility of a distance education institution. This shared insights with Roel P. Cantada's narrative on *MOOC Models*, which examined existing models and calls supplies the reasons why higher education institutions should offer MOOCs. On open educational resources (OER) the sub-discourse on *Sustainable OER Issues and Prospects* by Primo G. Garcia, et al. raised questions for consideration in terms of motivation, acceptability, engagement of users, and funding. Further, Sheila R. Bonito in her *Virtual Clinical Experience Courseware: Opening Access* shared the UPOU experience in showcasing the possible use of OER in distance education technologies. Following the discourse capture format at the supra level, the last chapter on *Openness in UP Open University: Institutional Reflections and Implications*, Melinda F. Lumanta and Alexander G. Flor attempted a meta-synthesis of the sub-discourses and provided institutional implications vis-a-vis UPOU's strategic thrusts in the years ahead as it moves towards a trajectory of openness.

All these are part of a continuing experiment that we have embarked upon to help us define ourselves, our institution and what we stand for.

**Alexander G. Flor**

**Melinda F. Lumanta**

Editors

## LIST OF ACRONYMS

AA	Associate in Arts
AAOU	Asian Association of Open Universities
AI	artificial intelligence
ALS	Alternative Learning System
APE	advance placement examination
APEL	Assessment/Accreditation of Prior Education and Learning
API	Academic Program Improvement
APL	assessment of prior learning
ASEAN	Association of Southeast Asian Nations
AU	Athabasca University
A&E	Accreditation and Equivalency
CABTS	Central Agricultural Broadcasting and Television School
CAEL	Council for Adult and Experiential Learning
CALABARZON	Cavite, Laguna, Batangas, Rizal and Quezon
CAR	Cordillera Administrative Region
CBCP	Catholic Bishops' Conference of the Philippines
CC	Creative Commons
CHED	Commission on Higher Education
CIA	Central Intelligence Agency
cMOOC	connectivist massive open online course
CMS	content management system
CU	Constituent University
DE	distance education
D/MLVM	Diploma in and Master of Land Valuation and Management
DOST	Department of Science and Technology
EFA	Education for All
ETEEAP	Expanded Tertiary Education Equivalency and Accreditation Program
EU	European Union
FAO	Food and Agriculture Organization

FICS	Faculty of Information and Communication Studies
FICs	faculties-in-charge
FMDS	Faculty of Management and Development Studies
GAT	Graduate Admission Test
GDP	gross domestic product
GED	General Educational Diploma
GLSD	Gender & Labour Studies Diploma
GMR	Global Monitoring Report
GWA	general weighted average
HEI	higher education institution
HRM	hotel and restaurant management
ICDE	International Council for Open and Distance Education
ICODeL	International Conference on Open and Distance e-Learning
ICT	information and communication technology
ICT4D	Information and Communications Technologies for Development
IDRC	International Development Research Centre
IVLE	Integrated Virtual Learning Environment
IWLP	Industrial Working Life Programme
KM	Knowledge Management
LED	Labour Economics Diploma
LLN	Language Literacy and Numeracy
LMS	learning management system
LSD	Labour Studies Diploma
MENRM	Master of Environment and Natural Resources Management
MIT	Massachusetts Institute of Technology
mMOOC	Mechanical Massive Open Online Course
MMORPG	Massively Multiplayer Online Role-Playing Game
MODeL	Massive Open and Distance e-Learning
MOOCs	massive open online courses
MOODLE	Modular Object Oriented Dynamic Learning Environment
MSEUF	Manuel S. Enverga University Foundation

NC	National Certificate
NCR	National Capital Region
NFE	Nonformal Education
NIH	National Institutes of Health
NQF	National Qualifications Framework
ODeL	Open and Distance e-Learning
ODL	open and distance learning
OER	open educational resources
OERu	Open Educational Resources University
OFW	Overseas Foreign Workers
OL	open learning
OLN	Open Learning Network
OOCs	open online courses
OS	open source
PEPT	Philippine Education Placement Test
PLA	Prior Learning Assessment
PLAR	Prior Learning Assessment and Recognition
PLE	Personal Learning Environment
PNP	Philippine National Police
POC	Philippine Online Chronicles
PQF	Philippine Qualification Framework
PSDD	Political & Social Development Diploma
PTQCS	Philippine TVET Qualification and Certification System
PVT	Philippine Validation Test
RPL	Recognition of Prior Learning
RSS	Rich Site Summary
RTD	roundtable discussions
TESDA	Technical Education and Skills Development Authority
TMA	tutor-marked assignment
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
UgAT	Undergraduate Admission Test

UKZN	University of KwaZulu-Natal
UPCAT	UP College Admission Test
UPOU	University of the Philippines Open University
VINFL	Validation of Informal and Non-Formal Learning
xMOOC	extended massive open online course

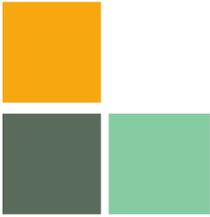
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# CHAPTERS







# CHAPTER 1

## Thoughts on Openness in a Digitized World

Grace J. Alfonso

Online Distance Learning (ODL) is a concept that has been well conceived and has reached the point of building up its own literature and thereby leading to its application. Institutions and associations have thickened the discourse on this and have exchanged best practices, resulting in a strong community through many years. ODL is a merging of two concepts, that of open learning and distance education. This merger occurred when distance education institutions stated and agreed that distance education (DE) is a mode of learning in which students and teachers are physically separated from each other, students undertake guided independent study of specially designed learning materials and multimedia, and two-way communication exists between the teacher and the student. This mode of learning is commonly called continuing education, learning-centered education, distance education, distance learning, flexible learning, or distributed learning.

The ODL community declared that distance education should always be attached to the concept of open philosophy or learning. Open learning is a vision of an educational system in which education is accessible to every individual and with minimal restrictions. It emphasizes the flexibility of the system to eradicate problems caused by barriers like

age, geographical location, time constraints, and economic situation. The concept of ODL is related to the concept of open learning (OL) which is a philosophy of learning that is based on the flexibility of access for equity in education. It is learning centered where learners determine what, how, when and where they want to learn and as they learn, they self-assess as well and determine their career direction.

ODL, therefore, is a system which combines the methodology of distance education with concepts of open learning and flexible learning. This concept started with the establishment of the National Extension Institute in the United Kingdom in 1963, which later served as a model for the creation of the UP Open University in the 1990s. But of course we have revisited what we mean by “open”, and how open should open be to be considered open. There are many situations in which institutions can be open but not as open in some areas, but we would still consider them to be open. When all these concepts of “open” were being discussed and agreed upon by the community it should be noted that the concept of e-learning was not yet existing then, and therefore not seen in the equation. But we now live in a digitized world where the explosion of knowledge and availability of resources in the internet, and with recent advances in information and communication technologies, have spurred educators to develop new methodologies in order to take a closer look at teaching and learning pedagogies. And today, in the digitized world the term open and distance e-learning, ODeL (with a small letter ‘e’) may seem appropriate within the kind of setting in which we are moving. As we further discuss this concept there are more common terms that will come to mind, such as distance education, e-learning, flexible learning, online learning, and blended learning. For purposes of discussion we use the term ODeL which we bravely claimed in the first International Conference on Open and Distance e-Learning (ICODeL). As we continued the discourse on open and distance e-learning, we agreed that there are really three dimensions in ODeL: open learning, distance education, and e-learning. These terms denoted all forms of educational provisions that use contemporary technologies to enact valid combinations of

synchronous and asynchronous communication of learner and educator who may be separated from one another for part of or all of the entire learning experience. The UP Open University is now engaged in discussions of the value of openness in teaching and learning in a digitized world.

We are at the stage of studying carefully what is now in front of us. Thus, we have added the concept of e-learning to enhance open and distance learning (ODL) which is now a very much accepted concept that has been proven to work. As the quality assurance systems of ODL are still being finalized, the three aspects of ODeL should not be based on the standards by which the residential universities are evaluated. Doubtless, traditional universities have set quality standards and ways of quality assurance. With the existing systems of evaluation and rating, open universities are rated regardless of their being residential or not. We are always questioning the standards, but the more we speak of openness in learning in a digitized world, information and communication technologies (ICT) come into focus as having such effect on distance education and open learning.

Today, ICT is always a part of the discussion in international conferences. The following are the areas where the concept of openness in ODeL occur and help expand the space of openness: participation in open and educational resources (OER) movement, participation in the creative commons (CC), openness in the use of open source (OS), content management system (CMS), learning management system (LMS), open learning network (OLN), personal learning environment (PLE), open textbooks, and combinations of these.

An article by Mott and Wiley (2009) about open learning, CMS and OLN points out the weakness of the CMS paradigm. Similarly, OLN should be seen as critiques of the predominant pedagogical model in higher education. They feel that institutions and instructors should aim to do more than just transfer knowledge from the professor, the library and the textbook into the student's brain. It also has the potential to be used in support of the traditional lecture based on content-centric courses. The

reason for this is that it removes artificial lines or artificial time limits from student autonomy in the learning process. OLN removes the barriers that stand in the way of those who are anxious to innovate and make use of new learning methodologies. The independent nature of OLN with regard to place and time affords limitless learning activities and learning interactions that are not possible in the place- and time-bound classroom.

Now looking into application in UPOU, maybe we should also continue the discourse on CMS, LMS and UPOU's my-portal. And let us encourage people to study these as we go on talking about openness. The open teaching is another concept. A study by Rodriguez (2012) in *MOOCs and the AI-Stanford like Courses: Two Successful and Distinct Course Formats for Massive Open Online Courses* cited that massive open online courses (MOOCs) for students was an important development in online education in the past years. A course on artificial intelligence (AI) was offered by Stanford University and 160,000 students registered in the course. It was an experiment of Stanford Computer Science Department to offer other courses for free, offering it to the world with two of the best-known experts in the subject as instructors. Another course was launched by Massachusetts Institute of Technology (MIT) and Harvard offering the course to millions of people around the world. It speaks of distance education and the writer of the article, Rodriguez (2012), talks about the classification in terms of the pedagogy of cognitive behavioral and social constructivist and connectivist concepts. I think the UPOU should study how we shall brand and what standards to use in UPOU offerings.

Openness can also be applied in the admission process, in the general rules on admission requirements, and on accreditation. There can be program-based decisions on the exceptions to the rule, but the general rule, for example, is no late registration. Openness in giving credits in degrees, ladderized programming, multiple entrances and exits are program-based decisions. We have already improved on certain courses having added some exits in the existing format. Openness in delivery modes such as synchronous and asynchronous delivery modes, and knowing- by-learning

are likewise areas to explore. The use of tablets is now being studied by UPOU's Faculty of Education. I think it is really about time to put up a large research project which the Department of Science and Technology (DOST) can look into, and can provide funding for digital technologies (ICT).

It is time to study openness in cost and affordability, to look into scholarships and discounts with possible openness in admission policies. I think this time there should be openness in really helping our country attain social transformation through reaching out to the young leaders throughout the country. We could help our young people with openness in choosing their education track, with open curricula, self-advising, etc. Openness in course design and evaluation are probably the most interesting and challenging areas to consider. If we look at the way we design our courses, it seems that we have a strong residential favor or bias in our courses. But obviously this area needs closer study. Every time I look at my course, I say, it looks closed but we would look into that. We should be able to evaluate the courses we offer (or is this really assumed), and all other areas which were said to occur should even develop towards openness in an ODeL institution. As we have a reflexive look at UP Open University, we certainly can look into the studies along these lines and other interests. In a digitized world and the growing openness in the education environment, we need to look into ourselves and contextualize ourselves.

After declaring these areas where openness can occur, we need to look at the larger picture - the environment with a large letter 'E'. How open is the education in the local environment setting? The residential culture will perpetuate its situation as long as it can. Government regulatory bodies like the Commission on Higher Education (CHED) is always in fear of the perpetuation of cheap degrees victimizing willing and unwilling victims. The transnational education which is now here, is coming from all over the world crossing borders which are seamless in the e-learning world. Transnational education, open learning and distance education, which are perceived as akin to the mass education as a correspondent school

move, which historically have been taken out of the picture, are once again picked up by the e-learning concept. So the ODL, open and distance learning environment has this resistance. And only large and confident universities may probably explore the areas of open and distance e-learning.

As I have mentioned earlier, there have been experimentation on online learning that seems to be progressive. It will probably entail long and winding negotiations and discussion of all these in all our conferences and other venues. And in addition to e-learning, online learning or digital learning creates a question of acceptability of ODeL in ODL. There will be a continuing discourse on reluctance that leads to the popular e-learning. Sometimes, there is a concept of fear of being contaminated by the commonness and the popular. Maybe there is a reason why we are looking at the popular. The reason may be that the e-learning component makes us focus more on teaching and learning models that are closer to our community's and communities' culture within the open learning environment or that of a person's learning environment absorbing the culture of scholarly rigor which gives tolerance and respect for cultural diversities. And we need to look likewise at all texts in the web as data for possible research and not just a gamut of inconsequential blurb on the internet. We need to come to terms with what the university is about and base our identity and belief on what we are. The UPOU is unique because of the following reasons: it is a graduate and research university; it is part of a national university, the University of the Philippines System; it is a transnational university, being an ODL university; its creation coincided with the inception of the internet; and right now it is part of a mobile culture with almost 100 percent penetration compared to 80 percent penetration in 2009. So it is part of us, part of our personal connectivity. UPOU is operating in an ODeL environment, the direction where distance learning education should always go with a concept of openness. In other words, that's where we're operating at. This is the very reason why we are dealing with the question of "how open is open" in UPOU.

There may be conflicting terms like national, transnational, and regional.

But actually they do not need to be in conflict; these are not conflicting concepts because these are ideas that may coexist with one another in a larger concept of space. Now this larger concept of space grows into ongoing squares of an ODeL institution existing in this complex environment, maybe reminded by the constitution's reasons for being when we were created. It has been repeated through time, that UPOU is a university committed to academic freedom, academic excellence, widening the access to quality education, the strengthening of the Filipino workforce and betterment of tertiary education in the country through open and distance learning for a more just, democratic and humane society. At the end of these soul searching sessions and as we go back to our world and our own disciplines, we hope that in our own ways we will be contributing to the worldview of openness in learning.

In an online discussion by Tony Bates (2009) on *Recurring Issues Encountered by Distance Educators in Developing and Emerging Nations*, there was this article citing Wright et. al (2009), which talks extensively of the direction of developing countries going into online teaching. This call for caution and prudent action by the authors is sensible, necessary, and mandatory. In this article the following points are extensively taken up and recommended: developing a sound rationale and vision for the distance education initiative, recognizing that technology is only one component of the educational transformation, addressing the lack of infrastructure and the cost of bandwidth, obtaining equipment when funds are limited, dealing with limited resources, placing greater emphasis on quality resources, recognizing those who are likely to succeed, addressing student needs, dealing with faculty concerns, accessing up-to-date educational resources, implementing mobile learning, countering cultural imperialism, and addressing cultural diversity.

I would like to think that the UP Open University is moving along on these aspects and the list of things to do, although not necessarily all in the same degree. The last in the list which is countering cultural imperialism and addressing cultural diversity may not be the only one that has

been seriously addressed as of this time. And even with these words of caution, many would still aspire to work on how to integrate the realities of work 2.0 in the future concepts of mobile application and the concept of ubiquity in a web 3.0 future scenario. The interactivity, connectivity, ubiquity and multiplicity of mass access will always be a subject of research and experimentation because the digitized world is here to stay with enormous, persistent, prevalent and overwhelming gamut of multimedia text. There will always be those who are concerned with having a market for as long as certificates and diplomas are a requirement for promotion and employment. There will be a demand for formal higher education. The open market setting will create an environment where academic institutions and commercial institutions selling education will be stakeholders, those who will deal with formal and informal learning, where both will promote lifelong learning and professional continuing education. When market forces come in, you know they will take hold of that stake and we'll be part of it anyway, even in a non-virtual world.

What I would like to ask our university, the UPOU is this: Is openness valued in our university? By this I mean, for us to reflect on our university, a university that has early appreciation of media, grounded from delivery and course development, espousing openness, and dealing with our students and openness as an essential part of everyday operations. Is it an agency moving towards openness or is it simply transferring educational values and practices we hold so dear, nurtured by traditional education modes enveloped in enhanced technologies? So reminding us and claiming the space of *universitas* as we took it up in ICODEL, e-learning as a mode of teaching does not exist in a vacuum and is influenced by socio-cultural, political, and economic factors. These factors define what kind of e-learning will prevail and how it will affect our educational system in particular and societies as a whole. For instance, the diversification of e-learning providers may provide learners with more options but it can sometimes result in unintended consequences. And this is what I mean by studying it so that if we go into this it should have a UPOU mark on it. How does open and distance e-Learning hold on to its vision in the

midst of these changes? Aside from getting inspiration from ODL's notion of public service and access to equity, we need to look into learning within the context of *universitas*, the larger perspective, the larger communities that the state has given us the mandate in which to operate as well as the citizens who will give support. But we are going back to the concept of *universitas*, what we can better appreciate is what education is regardless of its mode of delivery. It is actually a social contract; the code of *universitas* is a social contract in which universities help in the social transformation of society by producing professionals who contribute to organizations, institutions, and economies. We have transformed societies by nurturing innovative ideas, facilitating discourse and important social issues, and developing technologies to encourage the free exchange of ideas, and thereby, allowing its community of scholars to think creatively and critically. E-learning, when properly designed and delivered, develops learners who can think critically, analyze a situation from different angles, respect other ideas and propose creative solutions. In my observation, course design and delivery are not enough to realize all these potentials. For such learning to be authentic and therefore achievable, e-learners and e-teachers need to know and feel that they are part of a community of scholars. E-learners and teachers need to imbibe the values that have made the *universitas* the cradle of social transformation, academic freedom, humanism, intellectual pluralism, academic excellence, democracy and service to society. In the ODeL framework we see the features and affordance provided by open learning distance education and e-learning, access and equity, resource sharing, learning-centeredness, flexibility, active learning, interactivity, ubiquity and connectivity.

These affordances and features, are infused with values that underpin the *universitas* ethos of excellence, academic freedom, humanism, intellectual pluralism, diversity, democracy, service to society. Together all these elements are embedded and facilitated by networked communication and information technologies. The convergence of these components can bring about social transformation. ODeL is more of a worldview, a construction of how open learning and distance education

and e-learning can converge, diverge and co-create with each other effectively within the context of *universitas*. There are issues in ODeL, we have issues in the plurality of ideas, and of a multidisciplinary scenario. This scenario reveals that the world needs more people who have greater understanding of the complexities of the world around them, a high level for tolerance and differences in that world, and a more open mind to transformation. These are the same values that define *universitas* for us who work in ODeL, which demand of us not only to design courses that encourage participation but also to develop content that presents a range of ideas and perspectives. It has done a great deal in democratizing learning materials; however, the developing world has proved to be more of a consumer rather than a producer of content. To create a truly global perspective, the developing countries must endeavor to find, construct, and produce information which will capture and preserve our stories, experiences, and interpretations of our world in the vast and limitless web.

I am sure we agree in the production of scholarly texts in the network for the world of academics making scholarly texts accessible to people across the globe. Academia should maximize the potential of multimedia in the conduct and dissemination of research results, in creating and sharing OER. While sharing is our primary purpose, nonlinearity of the medium is also an advantage. We are capable of reconfiguring a space for second orality, pursuit of hypertext, hypermedia, hypermultimedia, bringing back the nonlinear, nonhierarchical organization of information of primary orality. The digital text has given the ordinary people a voice and thus has expanded their democratic space. With common knowledge backed up by personal experiences, the virtual communities declaring shared meanings come into focus. Credible information coming from these virtual communities can be used for social transformation. We regard our teachers and learners as co-creators of text as a way of enhancing the virtual world with academic rigor. E-learning technologies are characterized by an unending cycle of conversations and dialogues. They have the openness to enrich discourse that is recorded through this medium. Just like the way we have become conversant with the technology of writing,

teachers and learners will have to be eloquent in this new technology. Teachers and learners will have to go beyond traditional technologies with a linear nature or direction, and understand and appreciate how to think nonlinearly. This has implications on how we recruit, train and even compensate all our teachers, researchers, and administrative staff.

This is instilling the *universitas* ethos in the academic environment. In conventional universities their ethos and *universitas* manifest from the way as it were conducted to the way research are undertaken. How do we refine and redefine the space of socialization? Should we create new rituals for the performance of this ethos? How do we make social networking a tool, not just for entertainment and personal connectivity, but strengthening a sense of community of scholars? These issues suggest possibilities for ODL. Lastly, we have the issue of digital divide. Just as ICT can be used to reach sectors that are served by the conventional educational system, I see they can also marginalize people who do not have access to ICTs. To address this concern we need to improve the ICT infrastructure in the rural poor areas by engaging in projects and programs, working with governments and private sectors to contribute to this connectivity and to go outside our university work to make sure that the government will help in that connectivity.

The use of ICTs and the web in particular has an internal logic in it and therefore, requires a set of knowledge skills. For us educators, the bigger challenge is how we can assist disadvantaged people to overcome this cognitive divide. In addition, we may need to explore more ways of combining online technologies with earlier media (e.g. TV, radio, and print) to address the needs of certain sectors. Open and distance e-learning offers many opportunities for experimentation and innovation. These opportunities are here today and will proliferate more so in the future.

This roundtable discussion adds to the important thickening and deepening of the discourse on openness in ODeL and where the UPOU is in the middle and even perhaps in the forefront of it all. What is very clear as a direction is the need to create this shared meaning among our UPOU students. We

may differ in approaches and applications of our mission and how we will contribute to attaining our vision as an institution through knowing the beat of our environment and responding to its challenges. And somehow we see that our institution being an open university is better equipped to do this than the residential universities, and through our work in research and practice coming from this roundtable discussion we certainly will strengthen our commitment to social transformation through learning.



## CHAPTER 2

### A Sub-discourse on The Invisible Teacher

Alexander G. Flor

*“Who are you when you teach?”*  
- Mary Bart

### CONTEXT

Teachers in open universities adopt teaching styles and apply pedagogies that may differ from those in conventional classrooms. But how do they see themselves? What persona do they assume online? Do they regard their role as similar to the traditional teacher?

For so long, the UPOU faculty’s sense of self has been a lingering question provoked into occasional discussion but left unresolved for future articulation. One such trigger that resulted in a brief but animated exchange was a talk delivered in the Roundtable Discussion on Openness at the UPOU Oblation Hall in 23 August 2012. The presentation was titled, “The Invisible Teacher.”

The narrative of the Invisible Teacher is based upon the construct that current information and communication environments are making the

traditional teacher redundant and the traditional university irrelevant. The role of the traditional teacher diminishes within an online classroom. Faculty members of open universities can become effective educators while being minimally invasive of the online student's learning space. Moreover, the World Wide Web is fast replacing the university as the repository of knowledge.

However, it is also noted that UPOU faculty may be subjecting themselves to inordinate risks while applying open education and open access approaches in their academic work. Colleagues from conventional universities may admonish them for being absentee teachers. The university itself having been the traditional bastion of intellectual property rights may not be too sympathetic to the notion of open access and open educational resources.



hardly discernable in the word cloud. Truth be told the information society concept originated in Europe, from Austrian economists who migrated to the United Kingdom and then to the United States just before the Second World War to avoid political persecution. A couple of decades later in the US, they altered the name of this area of study from knowledge economics to information economics.

The word cloud gives reference to Castells, who is now the most familiar thought leader on the subject although he came into the scene barely fifteen years ago. The economists who initiated the information society discourse - Hayek, Schumpeter and Machlup - published their seminal work in the thirties and inspired American economists like Mike Porat who, in the late seventies, produced his twenty-volume dissertation titled *The Information Society*.

What makes an information society? The technical definition of an information society is a country that runs on an information-based economy. From a national accounting perspective, an economy is information-based if a substantive portion of the country's GDP is generated by information transactions. From the point of view of labor economics, a country is an information society when the majority of its workforce is made up of information workers. The transformation of an agricultural or industrial society into an information society is known as *informatization*.

My 1983-86 data proved that the Philippines possessed an agriculture-based economy. The theoretical proposition adopted then was that the Philippines was an agricultural society within the Information Age, and, as such, held the wrong end of the stick.

Today in 2012? Surprise, surprise...

The Philippines has made it to the list of nations which may be considered as information societies. According to the Central Intelligence Agency (CIA) website, our information workers overtook our agriculture and industrial workers in 2007.

I am not kidding. The CIA website is open, if you would like to do a fact check. From its most recent figures, we now belong to the category of countries where information labor (or services) have exceeded agricultural and industrial labor. We are now like Singapore, or Canada, or the UK.

**Openness Icons.** How does all these relate to the theme of openness? The main thesis of this talk is that openness has a direct bearing on informatization and, for that matter, informatization has a direct influence on openness. Specifically, I submit that *informatization is bearing upon open education*. Informatization is changing the way we teach and the nature of our educational institutions.

A few more related images before we proceed.

This figure, an open padlock shaped like a small letter “a,” is the international symbol for the open access movement.



This coat of arms, in turn, symbolized the UK Open University, which according to Sir John Daniels during the 2011 AAOU, is now the fifth highest ranking higher educational institution in the UK, outranking even Oxford University. It appears quality is no longer an issue as far as the UK Open University is concerned.

And this is the global symbol for the open educational resources movement.



The University of Michigan has an open university also. But instead of calling it University of Michigan Open University (as we call ours awkwardly), it is called Open Michigan.



[open.michigan](https://open.umich.edu)

This nomenclature was adopted by the University of Nottingham, which is number four in the UK. They call their open university, Open Nottingham. Perhaps we should begin calling ourselves Open UP instead.



...Or Open Philippines. But that's another issue.

## Turning Points

To introduce my propositions, I need to relate three events that I consider significant markers to my sense of self as an Open University teacher. The first one, in fact, occurred a few days before formally joining the faculty.

***Good Will Hunting (Beijing to Manila, August 2002)***. Our last University Council meeting coincided with my 10th year with the UP Open University. I joined UPOU in 16 August 2002. Three days before this date, I was in a plane from Beijing to Manila, finishing up a Food and Agriculture Organization of the United Nations (FAO) assignment with the Central Agricultural Broadcasting and Television School of China. The school, called CABTS for short, is arguably the largest agricultural school in the world because it enrolls more than nine-hundred thousand students per semester as of 2002. It is, of course, an open and distance learning school. CABTS admitted secondary school finishers of all ages and backgrounds. It utilized broadcast media as its main delivery system. In 2002, CABTS was in the process of migrating to online learning and I was engaged by FAO to advise them on appropriate shifts in content formats and pedagogies.

With CABTS closely behind and UPOU directly ahead, I settled down on PAL Flight 359 where the movie *Good Will Hunting* was about to be shown as in-flight entertainment. The movie was co-written and co-starred by Ben Affleck and Matt Damon way before the former played Batman and the latter became Jason Bourne. Although it was released in 1997, I was going to view it for the first time.

Matt Damon's character, "Will," was an impulsive, violence-prone teenager working as a janitor at the Massachusetts Institute of Technology. He was also a closet mathematical genius. Without finishing high school, he was able to solve the most complicated equations brought before him by the MIT math professor who discovered him (played by Stellan Skarsgard in the movie).

There was one scene in the movie that carried much resonance given my immediate ODL past and future. This scene was inside a bar in Boston. A long-haired Harvard graduate student was making fun of Will's buddy Chuckie (played by Ben Affleck), a working class dude pretending to be a scholar to impress one of the coeds inside the bar. The grad student was ridiculing him in front of the girl, with intellectual jargon, which Chuckie clearly cannot follow. Will approached the group with the intention of kicking the obnoxious character's butt. But instead of beating him up, he engaged the grad student in a rapid debate on the political economy of colonial America. Will systematically creamed the fellow, cutting down every argument that was thrown at him, pointing out the grad student's plagiarized ideas and humiliating him in the company of his friends (and the girl) in the process. The last thing Will said in that scene was

*"You know what?  
You just blew \$150,000 on an education  
that you could get for \$1.50 in a public library!"*

That statement was a declaration that it does not take a genius to be knowledgeable in 18th century American political economy. It does not take a Harvard University education either. All one needed was a public library card. Immediately, I related the scene to my circumstances. Was independent learning (and for that matter, ODL) written in the stars? If this was the fate of higher education then UPOU would be right smack in the center of it. Can the public library be an alternative to a UP education? Matt Damon's character received his education without the benefit of an institution with real live teachers. And to think that the movie was produced in the mid-90s when most people read hard copies, not surfed the Web. To be riding the crest of the online education wave was elating, to say the least.

**e-Learning Conference (Manila Hotel, August 2003).** Exactly a year later, August 2003, UPOU co-hosted the 2nd National Conference on e-Learning in Manila. Sir Anthony Cleaver of the UK Open University was one of our

plenary speakers. During his talk, Sir Anthony introduced us to 3G (third generation) open learning or e-learning.

He enumerated the characteristics of 3G e-learning. First, 3G programs are ladderized. Second, they have multiple entries and exits. Third, they are no longer analogous to residential programs, meaning they are not online counterparts of face-to-face programs but designed primarily as e-learning programs. All of our 27 or so offerings then were merely distance versions of existing residential programs. It occurred to me that our programs and courses that are based on or patterned after residential programs and courses should be thrown out the window. We should be offering programs and courses that are uniquely designed and developed for online delivery. This meant adjusting our content formats, pedagogies and assessment models, many of which were no longer applicable and will no longer work under e-learning conditions. It was a clear signal that the University and its programs will soon undergo change of a turbulent and yet exhilarating nature.

**The Big Shift (Los Baños, August 2007).** Four years later, we shifted learning management systems from the National University of Singapore's Integrated Virtual Learning Environment (IVLE), to the open source Modular Object Oriented Dynamic Learning Environment (MOODLE). I distinctly remember what our resident MOODLE expert, Professor Lolit Suplido, alerted us to what to expect. In MOODLE, she said, much of what we do as online teachers are done *before* the semester, not *during* the semester. I think she gave a figure, something like 70 percent of our work as online teachers should be completed before the semester starts. That, to me, meant that as faculties-in-charge (FICs), we were now shifting from instruction to instructional design. Our functions were transforming from teachers to course developers. We were metamorphosing.

It was quite apparent during the first semester of academic year 2007-2008 that our roles were indeed changing. We were not the sole authority in our online classrooms anymore. We no longer held the traditionally

revered role in the teaching-learning situation. Within the online classroom environment, where TED Talks was just a mouse click away (the link of which was supplied by us), there were more knowledgeable authorities that they can listen to and actually witness. This was true even within online discussion groups where the teacher ceased to be the god s/he was in IVLE. Remember the online discussion groups we had in IVLE? The moment the FIC posts his/her opinion, everybody else clams up. In MOODLE, we have lost the last word.

### **Propositions**

Now, I would like to forward three propositions applicable to our role as teachers in an open university.

Firstly, *the teacher is no longer the primary authority in the classroom.*  
Secondly, *technology is fast making the traditional teacher redundant.*  
Thirdly, *technology is fast making the conventional university irrelevant.*

I have already discussed the first construct. Let us look at the second construct: technology is fast making the traditional teacher redundant. I would like to relate this with something that we have talked about informally in the past...



The teacher is not the sole authority  
in an online classroom.

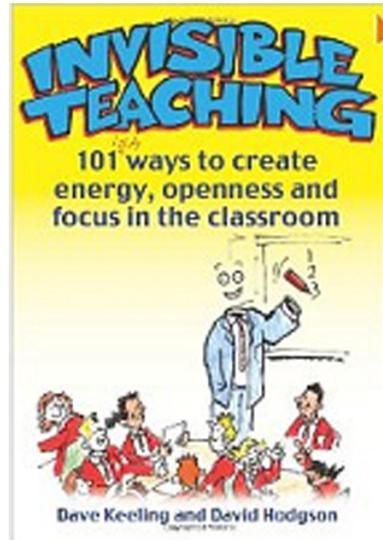
**Technology is fast making the  
traditional teacher redundant.**

Technology is fast making the  
conventional university irrelevant.

## The Invisible Teacher

**Qualifying the Concept.** If you Google the phrase, “invisible teacher,” the number one listed link will lead you to a book by Dave Keeling and David Hodgson.

This book on invisible teaching has nothing to do with open education or MOODLE. It came out in 2011 and it deals with residential classroom teaching skills not with online teaching skills. It presents “one hundred and one ways to create energy, openness and focus in the classroom” for primary and secondary grade levels.



The next Google entry that you will find on the list deals with a MOODLE community discussion thread. This thread also has no relation to our subject here. It is about getting access to and entering course sites anonymously without the knowledge of students and colleagues. This action, to the MOODLE community, is called invisible teaching. Our concept of the Invisible Teacher is more in line with a novel titled *The Invisible Man*. Not the book written by H.G. Wells published in 1897 but the postmodern novel of Ralph Ellison published in 1953. In this novel, the main character is *undefined*. As a matter of fact, he cannot be defined. One cannot put a finger on a protagonist whose characterization is fragmented.

This was exactly how I found myself during that first MOODLE semester: *Undefined*. An entity in the online classroom that one cannot put a finger on. Within my MOODLE space, I was teaching some of the time but I was also learning most of the time. I was there as an authority, yes, but my opinion mattered only to me and not to others. I was not instructing my students on the subject matter but I was showing them how to learn the

subject matter. It came to the point that my online presence hardly made sense since they were learning the subject without me in the equation. I thus became a non-entity in my online classroom. In other words, I became *invisible*. And under these circumstances, I conducted my online classes in succeeding semesters, initially as an experiment but eventually as a mainstreamed “method.” In the spirit of experimentation, I ventured into documentation.

**Features.** The class of the Invisible Teacher has four main features. Our colleague, Roel, was one of my students during that first semester when circumstances led me to adopt this “method,” if you will. These features will sound very familiar to him.

*Feature 1: A Course Site on Auto-Pilot.* Firstly, there is an apparent absence of the teacher. But let me underscore the word “apparent,” because the teacher is very much present although his presence is not so much felt.

**The invisible teacher**

- Initiated in 2007 as an experiment on open pedagogies and diminishing class roles of the ODL instructor
- Features
  - Apparent absence of the teacher. Course site on auto-pilot.
  - Open ended deadlines on assignments
  - Open ended discussion boards
  - Non sequential asynchronous engagement in content and forums
  - Availability of alternatives
  - Participation in course content and knowledge building
  - More opportunities for sharing and reuse of OER
  - Shift from competency-based to performance-based assessment, i.e. blogs, levels of engagement (analytics), content provision
  - Shift of emphasis from learning to meta-learning
- A not so unlikely scenario...

The online course site of the Invisible Teacher runs on autopilot with minimal intervention from the teacher. How is this done?

As Lolit Suplido hinted, before the start of the course, every learning object, instruction or activity is posted online. The course site is complete before Day 0. The course is not structured according to timelines as we would ordinarily do, i.e., week 1, week 2, week 3. The course site is structured according to units: Unit 1, Unit 2 and Unit 3. All the readings are there, all the instructions are there, all the links are there, all the discussion boards are up before the first day of classes.

*Feature 2: Open- Ended Course Calendars.* Secondly, we have open-ended deadlines on assignments. Most of my courses carry three units of credit. I assign one tutor-marked assignment (TMA) for every unit, which may be submitted anytime within the semester, from the start of the class until the end. There are no deadlines. The TMAs may be submitted anytime within the semester. If the student submits all requirements in the first two or three weeks, then he/she has completed the course as far as I am concerned. But then if the student is predisposed to procrastination, in spite of repeated warnings in the course site and in class advisories, because of work, domestic responsibilities, the window to complete the course is open until the last day of classes. This is true for discussion forums as well. An open-ended discussion board is never closed within the semestral timeframe. Furthermore, discussion forums are non-sequential-asynchronous engagements in content and form. A student may opt to begin with Forum 3 instead of Forum 1. He/she may opt to study the materials for Unit 3 at the start of the semester instead of beginning with Unit 1. Downloaded materials are never studied in sequence anyway. When our students download a document, they do not proceed chapter to chapter, page to page, or sentence to sentence. How do they study Web content? They browse. Similarly, one may begin studying the course material with Unit 1 and then end with the last unit, Unit 3. But another student may begin with chapter 3 instead of unit 1, unit 2 instead of unit 1. In the spirit of openness, how they proceed is no longer my business. It is their sole decision to make. Even the submission of TMAs need not be sequential.

Feature 3: The Availability, Discovery and Sharing of Delivery and Content Alternatives. Alternatives are made available to the student. Submissions need not be in text alone. Visual and aural TMAs are options open to them. Basic learning content (not merely in text but in multimedia, when available) is prescribed by the FIC, but the student may opt to study alternative learning content available in other Web sources. They are encouraged to visit OER sites such as the Massachusetts Institute of Technology (MIT) Open Course Ware.

This brings us to the *learning log*, a pedagogic tool inspired by Web 2.0 and introduced in these online classes that make possible student generated course content. Participation in knowledge content and knowledge building in these courses was operationalized through the learning log device.

As mentioned, my MOODLE classroom was structured according to the number of credit units, one unit corresponding to a major topic. I normally allot one learning log for every unit. Within the MOODLE space, a learning log was constructed by adding a Forum activity under the unit which may be titled as Learning Log 1, 2 or 3 depending on the unit number. Students were then instructed to share links of online learning resources that they found most useful for the corresponding unit. They were also encouraged to follow the links volunteered by their classmates, study these materials and react to them. In other words, each link shared became a discussion thread.

The learning log encouraged students to make discriminate use of the World Wide Web for scholarly research. It enabled them to share the open educational resources they discovered with their peers. Furthermore, it permitted open-ended discourse on these resources, many of which may be classified as fugitive or grey literature. Additionally, the learning log provided dynamicity, recency and relevance of course content. Most of all, it empowered serious students to learn independently.

Feature 4: Shift from competency-based to metacognitive engagement-based assessment. By now, you would be wondering how my students are graded. Before I go into assessment, please note that the courses that I handle are conceptual courses, not skills courses. Furthermore, they deal with development communication, a dynamic area of study actively transforming due to rapid changes in the development discourse and in the communication environment. The ephemeral or transitory nature of devcom thought necessitates frequent changes in cognitive outcomes and, thus, in content.

In my courses, I have shifted from competency-based to engagement-based assessment that allows me to put MOODLE analytics into play. I would know for instance how many times Student X has visited the site, read a post, downloaded a material, even if her presence in the discussion forums is not felt, in short, her degree of engagement with the learning activities and resources. I find it less critical to gauge their student's level of knowledge gain compared to the degree of engagement in the course. It is the "learning to learn" or metalearning that I would focus on rather than cognitive learning. My courses are graduate courses anyway. And the content of the courses assigned to me - ICT4D, KM4D, development communication - constantly change and are not cast in stone, *in aeternum*. What is recognized as significant knowledge this semester may no longer be relevant next school year. It is the shift from cognitive to metacognitive that would characterize my assessment model.

These are the four features of the Invisible Teacher method.

### **From Informal Experiment to Formal Research**

I am inclined to put together a research proposal on the Invisible Teacher method. If I do get to write this proposal, it would have the following research hypotheses:

Firstly, this approach will have a significant effect on attrition, mortality, or the dropout rate among open and distance learning classes. However, the degree of effect is dependent upon level, content, gender and age.

I would imagine it would be more effective in Ph.D. classes than in undergraduate classes. In terms of content, we cannot use this technique if the course content is on the natural and the physical sciences, logic or languages where learning is sequential. This approach cannot be used in mathematics, for instance, or in basic subjects where one goes about the curriculum in a certain order. In other words, it would not be effective in basic education.

Thus, the effectiveness of this approach is directly related to the level of education. The lower the grade level, the lower its applicability. The higher the grade level, the more effective it becomes. The appropriateness is positively correlated to education levels. It would be more appropriate to the higher levels of education, i.e., graduate school, where the emphasis is on metalearning.

## The invisible teacher

Significant effect on attrition.

Effect is dependent on content,  
gender, age.

Meta-learning: Learning to learn

Appropriateness is positively  
correlated to educational levels.

UNESCO has declared that one of our biggest responsibilities as teachers in lifelong learning is to teach our students how to learn. I submit that this approach will teach them how to learn *independently*. The problem that we face as of the moment is that many are not accustomed to this. Especially students coming from private schools, they erroneously believe that since they pay our salaries, we teachers should shepherd them. We should hold their hand and instruct them on everything that they need to do every step of the way. Even if every relevant instruction has already been written down in the course guide and on the course site, they still ask you to state it to them.

On these instances, my standard replies are: “Please read your course guide thoroughly and completely.” “Please read your class advisories.” “I do not repeat instructions already found in the course site since I feel that as students in an open university you should learn to learn independently.”

### Academic Dissonance



**Academic dissonance**

- The informatization of our economy, society and culture has resulted in the following imperatives
  - A deconstruction of our academic traditions
  - A rethinking of our scholastic values
  - A rationalization of our academic policies
- Tensions between
  - individual academic freedoms and institutional intellectual capital
  - Open education and pedagogic efficiencies
  - OER and IPR
- Knowledge Management
  - The comprehensive university as a knowledge organization
  - Current KM models were built on assumptions inapplicable to the academe
  - A KM model that addresses the above tensions

Our third and last proposition is that technologies are fast making the conventional university irrelevant. The Chancellor has introduced us to her thoughts on the *universitas ethos*. The main function of the University is social transformation even among open universities. Nevertheless, we must note that going open carries with it much academic dissonance.

The informatization of our economy, society, and culture has made the deconstruction of our academic traditions imperative. Indeed, our academic traditions are intended for social transformation, but they have always been and still are very hierarchical. The academe is structured in tiers, i.e., tiers of actors, tiers of disciplines, and tiers of traditions. Between these tiers, knowledge flows are encumbered.

Moreover, informatization is making us rethink our scholastic values. We are now questioning the value of Intellectual Property Rights and are endorsing open educational resources. Informatization is forcing us to reconsider our academic policies.

We now have tensions between: individual academic freedoms and institutional intellectual capital; open education and pedagogic efficiencies; OER and IPR. There is a field of study called knowledge management, which forwards that a comprehensive university is a knowledge organization. As such, its core business is knowledge sharing and reuse. It must champion open access and open knowledge resources. A thought leader among KM practitioners, Peter Senge, has observed that these assumptions are often inapplicable for contemporary academia. Unfortunately, the governance model for the university that addresses these current tensions and academic dissonance is yet to be conceptualized.

## **Risky Business**

Some of you have noted the subtitle of this presentation: “Risky Business”.

A not so unlikely scenario that always comes to mind is set in a Senate Budget hearing where the UP President and the UPOU Chancellor are present, on cam, being grilled by members of the Budget Committee. The Chair inquires why UPOU is asking for additional budget for more teaching items when its professors are never to be found by their students, “UPOU professors hardly interact with their students. They do not even answer

their questions. One of my staff members visited the Open University on a Monday and none of the faculty were there, even to attend the flag ceremony. “

If the general public equates UPOU education with traditional education then we are in for a lot of trouble. We are treading a very thin line so to speak. Open education advocacy is risky business.



I have mentioned in an earlier presentation that the word *university* is derived from the Latin phrase *universitas magistrorum et scholarium* roughly translated as a community of masters and scholars. In such a community, there's always a distinction between masters and scholars; always a divide between teachers and students, between initiates and the uninitiated or those who have never entered the university.

The university has never been open. Traditionally, it has always been elitist. This accounts for our rituals and our symbols, our ceremonial garments and our colors: Two stripes for the master's degree holder and three stripes for the Ph.D.; a hood to ensure anonymity, thus highlighting the person's ideas instead of personas. We have practiced these rituals for hundreds of years. As the Chancellor suggested, perhaps it is time

for us to explore other rituals. Instead of a toga, we now wear a *sablay*, regardless of degree or station. The *sablay* should then imply academic equality.

Informatization is fast making the traditional teacher redundant and the conventional university irrelevant. We are actually in the course of reinventing ourselves and transforming the university in the process.

## CONVERSATION

*So goes the Invisible Teacher narrative. Arguments and rebuttals sparked from the exposition in a conversation that followed. The threads and sub-threads were condensed into discursive points presented herein in chronological order.*

**On Web 2.0, User-Generated Content and other Outcomes (Jean Saludadez).** The concept of student-generated course content is parallel to user-generated Web content, the philosophy behind Web 2.0. At the UP Open University, Alejo Espinosa introduced the notion of applying web 2.0 in our courses.

**Author's Rejoinder:** Correct. Within the Invisible Teacher narrative, the learning log is an operationalization of Web 2.0. Students are required to build upon the initial learning resources and even on the learning resources posted by their classmates. To be consistent with the course design, the learning logs had to be structured on a per unit basis. The resources that got tagged the most eventually became part and parcel of future versions of the course.

As to the outcomes, it may be premature to make conclusions on the hypotheses forwarded for the suggested research. But there is one unintended outcome worth mentioning: the timely submission of grades. In these classes, grades are primarily based on MOODLE's engagement analytics, not on cognitive change. It is easier to compute grades if these are based on analytics rather than on rubrics. As pointed out for development communication courses, in particular, it would be more appropriate to assess student engagement in learning activities, engagement that would enable them to learn on their own about the subject matter in the future, rather than to assess their knowledge gain, knowledge that may eventually become obsolete in a matter of a few semesters.

**On Classroom Authority (Jean Saludadez).** The teacher designs the course and chooses the initial materials and resources that are uploaded or listed in the course site. Hence, it may be argued that the authority still rests upon the teacher and that it does not diminish since he/she still sets the parameters for the course content. Furthermore, it is difficult to imagine one's role in the Open University as redundant. We may interpret this trend instead as widening the latitude of participation in the teaching-learning situation. Moreover, to think of the university's role as becoming irrelevant is quite hard to swallow. There will always be a place for the *university* where ideas are generated, articulated and discussed.

**Author's Rejoinder:** Considering that careers (as well as futures) are at stake in these ideas, reactions such as Jean's are expected. But for purposes of accuracy, it should be noted that the presentation did not forward the propositions as absolutes. It stated that, *ceteris paribus*, technology is fast making the *traditional* teacher's role redundant and the *conventional* university's role irrelevant. UPOU is not a conventional university. Neither are we traditional teachers unless we elect to be such in online classrooms. But the online platform makes it imperative for us to shed our residential persona. Otherwise, we open ourselves to this perennial indictment constructed by colleagues from conventional universities that distance education is merely an inferior, low quality analog to residential education.

**On Pedagogical Contradictions to Open Learning (Pat Arinto).** There is a difference between our methods at the Open University and traditional teacher-directed or teacher-centered approaches to education. The latter is underpinned by the knowledge transmission model where the teacher is the source of knowledge and information. It is to the credit of UPOU faculty that this model has not dominated our online craft. We often describe what we do as facilitating learning as our students engage in guided independent study of the course materials. We set the assessment standards, and decide whether the standards have been met.

Some of us are more facilitative than others. But it is not the facilitation that would differentiate us from the conventional teacher. What differentiates us is having the learner as co-teacher. That is what is really new and none of us has gotten there yet. In this scenario, the student produces knowledge that may be shared with others. Some of us are attempting this but there is dissonance between the intention and the practices that we are comfortable with.

The problem may not be redundancy but something else. Many of us are open (or would like to think that we are) to new ways of teaching, and some of us are practicing these. However, there is a disturbing resurgence of traditional modes in open and distance learning, which are ironically enabled by the new technologies. Web conferencing and real time synchronous video lectures, in particular, enable and encourage the knowledge transmission model in our online classes. There is also the aspect of design. The online platform requires us to design our courses more deliberately. In contrast, the traditional teacher thinks of his/her role as delivery rather than design. However, there is another disturbing development in our practice of online teaching, which is designing courses “on the fly” or “on the run.” Our technologies may be changing but the issues remain. People are still not comfortable with design work. The technologies might be different but teacher-directed or teacher-centred practices continue and we are faced with the same problems that we faced two decades ago.

***On Negotiated Openness (Jean Saludadez).*** Our students would have a different conception of openness compared to ours. Should not openness be negotiated? Should we not uphold a definition that is negotiated between the student and the university?

***Gigi Alfonso's Response:*** Openness as we practice it here is really negotiated. But at the same time, we are shaping openness since we consider ODL as a public service. Combining ODL with e-learning increases the potential of openness and accessibility. When we put the two together

we become faithful to the ideals of *universitas*, i.e., the framework of learning for social transformation. As we explore this new openness spawned by new technologies, we frame ourselves and our university as an instrument of social transformation, always thinking of the community, the nation and the world.

**On Instructional Design Capacities (Cesar Luna).** Effective learning materials are important but they are not the be all and end all of teaching and learning. Effective learning materials are necessary but not in themselves sufficient. Are we moving towards or moving away from producing effective learning materials? There was a free online class at Stanford on artificial intelligence or AI attended by 160,000 students and conducted by the world's leading expert on artificial intelligence. Now do you think that this expert had time to learn about instructional design and distance education? Obviously, the person had gotten help from an instructional designer. He did not have to learn how to teach online since he is already a subject matter expert. And I wonder if this is what's missing in the Open University. You want to pile every task on the faculty member. We train ourselves to do Prezi for our presentations. Impressive. But should I be the one doing this or should someone else do it for me so I can focus on the content. Yes the online teacher works more before the start of the semester and even more fundamental than that I think the role of the faculty member has changed. Our primary responsibility is not to teach in the sense of imparting knowledge but to create learning materials. We can only do this with a team, and within that team there will be an instructional designer.

**Pat Arinto's Response:** Well, some of us who have been around long enough know that that is how it ought to be done — i.e. the course team approach to course development, where you are able to produce course packages precisely through a division of labor among experts comprising a course team. The team consists of subject matter experts, media designers, instructional designers, and others. They would spend two years minimum developing fantastic course packages with audio-

video materials, books, readers, and guides. The UK Open University established its reputation through the course materials or packages that they produced using the course team approach as these materials surpassed in quality the traditional single-author textbook model.

The instructional design and the media design were the value added. However, that model alienated many academics. Academics felt alienated because instructional designers would tell them what to do, what questions to ask their students. And you needed new infrastructure for it to work. That is why they built media centers, instructional design centers, printing presses, television studios. It was a huge industry.

We tried this to a certain extent at UPOU. Then we shifted to MOODLE, which is a technology that allows you to create. You no longer need a large team to construct a course. The technology allows you to do everything and you structure things the way you like. And then with the development of open educational resources you really don't have to spend time and money on creating videos and other materials because there are tons of materials already out there.

I agree that we, individual teachers, cannot do everything. But what burdens us is that effective online teaching takes time — i.e. instructional design and assessment takes time — but we have other work to do such as run an office or program, committee work, and the like.

***On Choices and Creating New Knowledge (Gigi Alfonso):*** I would like to think that at the UP Open University we have a choice, a choice of whether we create text or not. In the case of Pat, I think Pat is biased towards making use of existing materials, OER in particular. But we have another option, which is creating our own text. I would like to think that the UP Open University will give you that opportunity.

I remember when we started developing our modules in the early years here at UPOU, there was a feeling among some of us that what we were doing

was not for a higher education. Our presentations, formats and choices were limited. It was like preparing material for secondary education. The moment we went online, completely online, our options opened up. Our horizons for creating materials in other types of text widened because of the opportunities presented to us.

But in creating our texts, we should have respect for cultural diversity. If we create generic materials we run the risk of alienating some members of the community at the onset. This is something we have not yet addressed. We create new knowledge through our new texts and we co-create new texts with our students.

**Pat Arinto's Response:** Actually, the more OER you use, then the more writing you need to do. That is something we neglect. We cannot just dump a pile of materials on our students without considering that these resources were created for another context. We should at least give a commentary regarding that context. That's why we need study guides. We need to write more when we use somebody else's resources.

**Sol Hidalgo's Response:** What makes us different from other schools is that we are online. The following idea cropped up when we were trying to develop an online community: "When you are online, you are spoiled for choice. There are so many choices. Anything is possible."

This, in fact, is our strength and also our weakness. Sometimes, I get petrified with the array of choices available. It is difficult to choose when you have so much to choose from. Our learning classroom ecology is like that of a tropical rainforest. Anything can grow there and diversity is so high. It is difficult to conclude that this model works better than that model. All models can work and I think that is the challenge that we're facing. The presentation says that we are becoming redundant. Actually everything is becoming redundant. We can choose any form, pace and space; any nationality, any context. Anything and everything is there and that is so difficult to handle.

**Author's Rejoinder:** Just for the record, the first batch of students where I tried this approach included our colleague, Assistant Professor Roel Cantada. These guys initiated the Wikipedia page on Informatization and it is still live to this day. Another batch, an undergraduate class, started the Wikipedia page on ICT4D. Today, however, this page has become unwieldy and chaotic with 170 or so students inputting into this page every year. The double entries and citations must be giving the Wikipedia editors a collective headache. In my ASEAN Studies 231 class, the students are actively contributing to the Wikipedia page on ASEAN. This is a small group of seven students but their inputs have been substantive so far. They are actually contributing to the sum of all knowledge found in Wikipedia.

**On the Assessment Method (Mendie Lumanta).** This approach shifts from competency-based assessment to performance-based assessment. However, if we take it from the perspective of a contract between a teacher and a student, what is the nature of that contract? I mean what do we tell them, what do we expect of them, how are they finally going to be assessed? I think we should have a very clear contract with the student because that is the nature of the learning process anyway. But we need clarity on how this can be done with this approach.

**Gigi Alfonso's Response:** We are part of a university that has an assessment system. How will our assessment change with this kind of model? Should we give this responsibility to our students? Should they assess themselves? That might be consistent with the model. It is very difficult for the teacher to be giving the grade in a very open type of model. So how should we assess learning in that kind of situation?

**Author's Rejoinder:** Fundamentally, should we assume that responsibility? Let us take a minute to situate ourselves. As a reality check, let me ask three questions. First question, what are the three most valuable skills that we possess right now as professionals? Second question, did we learn these skills inside a classroom from a teacher? In all probability, the answer to the second question is "No." So my third question is, how do we

situate ourselves in the grander scheme of things?

***Insights from a Student of an Invisible Teacher (Roel Cantada).*** Well in that course, I was in my element. I was allowed to do what I was capable of doing when we made the Wikipedia thing so I had to do some research on it. First, I practiced in the Filipino Wikipedia, I contributed a lot before we actually started working on it. For me, as a learner, I have a method where I start at the end and move backwards. I test where my expertise lies and when I fail in something, I list it down and go back to strengthen it. I tried this in the class because I do not adopt a linear approach. I start at the end and work myself backwards. At the same time, Dr. Flor was measuring metacognitive gains, not cognitive or affective. Metacognitive measure is actually for people who have reached a certain level of expertise or knowledge in a certain discipline. I agree with that approach. But what has been said about undergraduates is not what I have come to realize. Students who are used to 12 years of education where they have been forced into learning in a certain way require time before they are able to adapt to this method. So I don't think the concept of the invisible teacher precludes scaffolding. There will always be outliers who cannot capture the content. That's where the teacher would have to step in.

## POSTSCRIPT AND REFLECTION

**Massification vs Effective Mentoring.** In retrospect, there was a certain element of practicality in the Invisible Teacher proposal. Given considerations of time, distance and numbers, it was just not possible for us to generate the amount of feedback that our residential counterparts provide to their students. Nor did we have the luxury for hand-holding and close mentoring. Limiting our class sizes was neither practical since we can maximize the economies of scale with our online platform. The opportunity for what UNESCO calls the massification of education is too hard to pass off.

**The Absentee Teacher?** The Invisible Teacher does not refer to the teacher's absence but to the degree of his/her online presence. The teacher may be present without having his/her presence felt. The teacher is merely being unobtrusive, not getting in the way of the learning process, which we subconsciously do in conventional classrooms. E-learning allows one to lurk. The teacher may assume a minimalist posture in his/her "classroom" interventions. But it actually involves a lot of hard work, particularly during the preparatory stage. The hidden demands of this pedagogy have actually been the biggest dissuader for its adoption.

**Cognitive vs Metacognitive.** The Millennium Development Goals have been changed to Sustainable Development Goals. New media are now more influential than mass media. And the term "viral" is now used to describe messages in the communication process. In other words, course contents change substantively. This is our biggest justification for focusing on metacognitive outcomes.

**On sequential content.** I realize that the non-sequential feature of such classes may not work for all subjects, specifically those that require progressive instruction. For such classes, it would be best to go about the learning process in a sequential manner.

In my case, it worked particularly well with my DEVC202 (Introduction to Development Communication) class, the content of which were divided into three units: development, communication, and development communication. Students who wanted to get to the heart of the matter immediately proceeded to Unit 3. Students who were more attracted to communication commenced with Unit 2. Students who were more inclined to development work began the semester would not matter since these three units were modular and may be studied independently from one another with Unit 1. It would not matter since these three units were modular and may be studied independently from one another.

***e-Learning as Independent Learning.*** In the past three years, I have been involved in a number of related initiatives that have posed the possibility of squaring off these ideas with on-the-ground realities. These initiatives included: studying the feasibility of e-learning programs for maritime education and training institutes in Indonesia (2012); design of an ODL program for national, provincial, district and community cadres in Vietnam (2013); evaluation of the Open High School program of the Philippine Department of Education (2013); the introduction of blended learning at the primary level in Lao PDR (2014); etc. Furthermore, the University has since embarked on a number of Massive Open Online Courses and has been actively involved in the operationalization of RA10650, the Open Distance Learning Act. Through these, we have become more convinced that ODL can best be applied in higher education than in basic education, in the same manner as independent learning. Investing heavily on eLearning for primary and secondary education may result in low returns and unintended outcomes.

***Status of the Experiment.*** Up to this day, I am still engaged in this experiment on open pedagogies and diminishing class roles of the ODL instructor in all my courses. One can say that I have mainstreamed it as my teaching style. Eventually, I made it a point to include the following paragraphs in my course guides, which were reiterated in the first class advisory that I would issue:

*As my online students, I feel that it is incumbent upon me to brief you about my predisposition towards an open learning system. As you know, we operate within policies and guidelines set out by the University of the Philippines System, some of which may not be entirely consistent with open education, particularly the latter's constructivist character. However, I would like to stretch the limits imposed by a residential system upon our open and distance learning system. Thus, I will experiment on a non-linear, non-sequential, open-ended arrangement, specifically when it comes to our course requirements.*

*This means that:*

- You may upload your blogs anytime and in any order, within the semester.*
- Our learning logs are asynchronous and may be visited in any order at any time. All logs are open as of today and will terminate at the end of the semester. There is no specific timeframe provided for each unit or topic.*
- You may proceed with your readings as you are comfortable with, i.e., begin at the middle proceed at the end and end at the beginning of your reading.*
- The idea is to make the online experience as learner-centered as possible.*

*There is of course a downside to this approach.*

*Firstly, the responsibility for learning falls squarely upon your shoulders. If you succeed, the credit belongs to you exclusively. If you fail, you have no one to blame but yourself. However, this does not mean that learning should be an individual activity. You are fully encouraged to form support groups or online study groups among yourselves, using Google Talk, Skype or Facebook. Start communicating with your classmates to form these workgroups.*

*Secondly, it means that you require specific qualities in order to succeed. Paramount among these qualities is discipline, focus and determination. You should likewise possess an analytical or critical mind. You should know that you are expected to demonstrate academic integrity and intellectual honesty in your work. Make sure you do all the requirements on your own. ALL materials lifted from secondary sources must be CITED properly. Give a list of references and materials cited at the end of each requirement you submit.*

These days, my standard instruction cum explanation for learning log participation is as follows:

*Your individual Learning Logs will be the basis for your Forum Participation and Learning Resource Contribution grades. These constitute 45 percent of your final grade.*

*There are three Learning Logs, each corresponding to a course unit. After reading the course materials provided for each unit, do a Google search of related materials, preferably open educational resources or OERs, available on the World Wide Web. If you are not familiar with the OER concept, Google it and learn what it stands for. These may be in the form of text documents, podcasts, video or presentation materials. Choose what you think are the best among the lot and post the universal resource locator or URL for the material to share with your classmates. Your classmates are expected to study the material and post their reactions towards it. Thirty (30) percent of your grade depends on the three materials, which you have chosen to share. Fifteen (15) percent of your grade depends on the reactions that you post on the three materials shared by your classmates.*

*Please take note. Do not upload the material. Just post the URL. Uploading the material to our course site may be a violation of intellectual property rights (IPR) if the material is not an OER.*

*Your contributions to the Learning Logs may be posted in any order anytime within the semester. Again, although you are given this leeway, do not procrastinate. Consider this an opportunity to exercise your sense of responsibility and demonstrate your sincerity. You are strongly advised to complete these requirements as soon as you can. The earlier you complete these, the better for you.*

The approach has elicited different reaction from my students.

**Feedback.** The majority were appreciative, perhaps not because of the autonomy afforded them but because of the opportunity for procrastination that the method allowed. However, I would submit that procrastination is a tendency that is not innately encouraged by open ended arrangements but by the predominant educational model.

Since the narrative was presented, reservations have been expressed by several colleagues surprisingly coming from those who consider themselves staunch advocates of the learner-centered approach. To them, learner-centeredness means making it easier for a student to learn, even if it means directly manipulating variables inherent in a teaching-learning situation.

They are predisposed to provide the stimuli, incentives and conditions necessary for student to learn within the least possible time with the least resistance. They mouth learning principles such as the necessity of immediate feedback or instantaneous reward. I retort that such an approach belongs to the traditional classroom, not the virtual classroom. To me, the place for this type of learning is basic education, not higher education. Learner-centeredness refers to enabling the student to learn independently, on his terms. As champions of open education, we must take this learner-centered advocacy seriously. Otherwise, we exist as mere alternatives to residential education. And given our constraints, we remain poor alternatives who use technology to compensate for our deficiencies

based on the bar of traditional universities. In such a case, a student may learn cognitively, affectively and behaviorally. But he/she cannot learn how to learn under real conditions. Furthermore, power still resides solely upon the teacher who provides or withdraws these stimuli, incentives and conditions. Although we refuse to admit it, for so long, we teachers have considered ourselves as the main actor in a teaching-learning situation. We delude ourselves by thinking that students learn from us. The reality is that they learn inspite of us.

The narrative was presented before UPOU became actively involved in developing and offering Massive Open Online Courses, which reflected many of the qualities of an Invisible Teacher's class.



## CHAPTER 3

A Sub-discourse on  
**Open Admission: Rethinking the Use of  
Admission Criteria in Degree Programs**

Ricardo T. Bagarinao

### **CONTEXT**

The University of the Philippines Open University (UPOU) is the fifth constituent university of the University of the Philippines System. It was established on 23 February 1995 ([www.upou.edu.ph](http://www.upou.edu.ph)) to provide quality higher education through the distance education mode. Currently, UPOU espouses the open and distance e-Learning (ODEL) framework in teaching and learning, and plays a vital role in the study and practice of open learning and distance education in the Philippines ([www.upou.edu.ph](http://www.upou.edu.ph)).

To fulfill its mandate, UPOU has offered three undergraduate degree programs including an Associate in Arts (AA) program, 10 post-baccalaureate and graduate diploma programs, 13 master's programs, two doctoral programs, and 11 non-formal courses. Being an open university, UPOU is re-thinking the use of admission criteria especially in its Associate in Arts program. Currently, the program requires an applicant to take the undergraduate admission test if they don't fulfill the requirements for admission to a UP constituent university such as the UP College Admission Test (UPCAT) or the grade requirement of 2.0 or better and the minimum number of units of 33 units in his/her previous

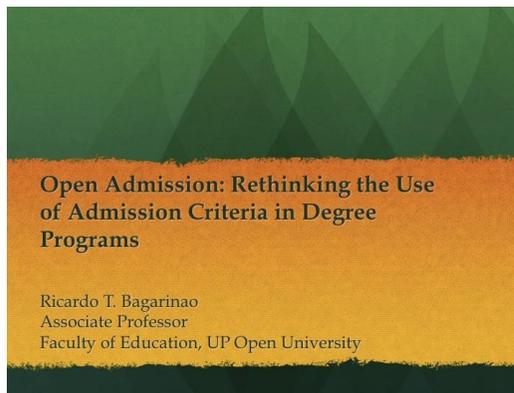
degree. Opening the program to interested applicants would mean the abolition of the admission test requirement. A similar admission guideline was proposed for the graduate programs with admission tests such as the Master of Public Management whose entry requires a graduate admission test (GAT). To discuss extensively and collegially these ideas, a round table discussion was conducted on 9 October 2012. The concept and operational definitions of open admission were presented. Case studies were presented as well, and implications of the idea of open admission were identified and discussed.

The objective of this paper is to reiterate the author's presentation and important conversations with regard to the subject matter during the roundtable discussion.

## NARRATIVE

### Openness in Education and Open Admission

In 1990, the United Nations Educational, Scientific, and Cultural Organization launched the “Education for All” (EFA) movement with the overall goal of expanding and improving comprehensive education, especially for the most vulnerable and disadvantaged children (UNESCO, 2015; Bates, 2015). Open education is one way of achieving the goals of the movement. Currently, however, there are some debates on how “open” is open education, especially when the admission requirements deter applicants from entering into a university’s degree program. Hence, there is a need to define open admission and then re-think the use of admission criteria in degree programs in conjunction with the philosophy of openness in general and open education in particular.



The concept of openness in education could be traced back to the mid-1980s when free software and open source had proliferated in the world. Peters (2015) considered such movement as being rooted in the Enlightenment that are “bound up with the philosophical foundations of modern education with its commitments to freedom, citizenship, knowledge for all, social progress and individual transformation.” With the developments and trends in Information and Communication Technology (ICT) worldwide, open education has become a central theme in societal development. Many developed and developing countries explored the

possibilities of developing ICT to enable learning environments to provide education to individuals who have no access to the traditional classroom-based curriculum. Despite the inclusion of the term “openness” in education, there are still some issues that need to be resolved. These issues include the concept of open admission. Though one of the goals of open education is to broaden access to quality education, only a few individuals have actually accessed university degree programs due to stringent admission criteria. While other open education-providing institutions used their admission criteria to guide their applicants as to what career they should take in the university, others use them as decision criteria for the acceptance or rejection of applications for admission. Any applicant who does not satisfy the admission requirements set for the program would not be accepted or admitted into the university. This has clouded the core spirit of “openness,” which allows a more inclusive and wider opportunity or access to higher education (UNESCO, 2006).

According to College Parent Central (n.d.), open admission means that the admission process is unselective and non-competitive and the only criteria for admission is a high school diploma or General Educational Development (GED) certificate. In addition, it recognizes and accredits prior learning and work experience as relevant antecedents to the prospective student’s end goals (Mendoza, 2013). This is the reason why admission to open universities is different from admission to traditional universities. According to Distance Learning Portal (2012), “Open Universities are committed to such a high level of flexibility that allow almost anyone to study even those that would not qualify for a study at a traditional university.”

### **Diversity of Open Admission Implementation**

In practice, however, open universities in various parts of the globe implement a certain degree of openness with regard to their admission policy. In the United States, for instance, four-year colleges use a minimum test score and grade point average as admission requirements (Grove,

n.d.). They collaborate with a community college so that applicants who failed to meet their admission requirements could still begin their college education. On the other hand, other colleges allow any student with a high school diploma or General Educational Development (GED) certificate to attend or pursue a college degree. Similar policies are implemented in various open universities in Asia, such as the Open University of Hong Kong, Sukhothai Thammathirat Open University, and Indira Gandhi National Open University where formal qualifications, admission tests, and language proficiency form part of their general admission requirements. In contrast, admission to The Open University in UK does not need any formal qualifications or the need to pass an entry test (The Open University, n.d.). What is required of an applicant is just a computer with a broadband Internet access.



### Open Admission in Practice

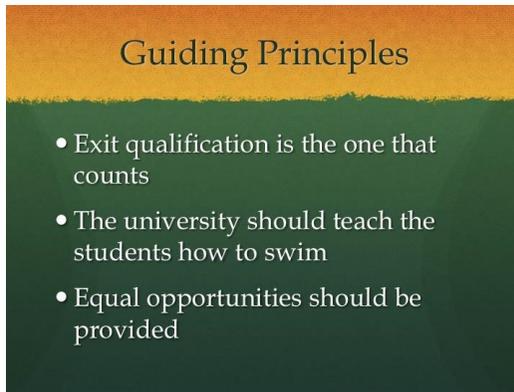
- U.S - most of the community colleges have open admission
  - requirements: high school or GED diploma; sometimes on-campus interview
  - Practiced for 2-year programs, associate, undergraduate certificate, or diploma programs
- U.K. - no formal admission requirements; use of opening courses (introductory level courses)

### **Guiding Principles or Points to Consider**

Universities that opted to fully open their admission are more concerned with the students' exit qualifications. This could be one of the guiding principles when an academic institution should adopt an open admission policy. Requiring any minimum qualifications before getting a degree program in higher education appears to be in conflict with the principle of openness. Likewise, admission requirements only validate the previous qualifications of students and would not in any way validate the quality of education of the accepting institutions. Hence, whether a university accepts the below or above average students, it would not prove anything

regarding the quality of its education. What is important, therefore, are exit qualifications of the students. They are important for several reasons.

One, the industry and society in general look at the quality of graduates that are added to the workforce. Two, exit qualifications validate the quality of education of the university. It would measure the contribution of the university to the overall professional development of the students. For example, a below average student who enters an open university with high exit qualifications rather than a stringent admission policy would be a living testimony of the university's quality of education when he/she graduates. It means that the training that he/she receives from the university provides him/her the skills and competencies necessary to obtain a university education. In contrast, a university with high and stringent admission policies could only admit students who already excel in their previous studies. When they graduate, you would not know if it were because of the university's training or their being excellent students.

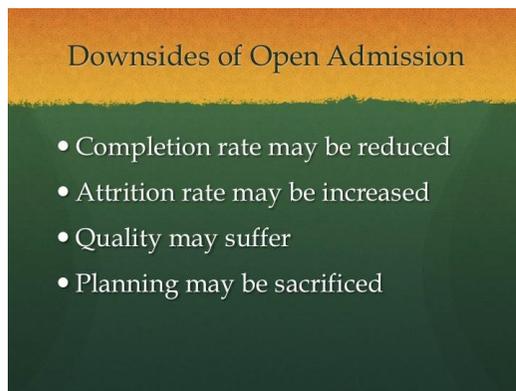


To help students meet stringent exit qualifications, however, universities with open admission policy should teach their students how to “swim” in their academic pursuit. In other words, they should focus on “providing support necessary for all students to have the highest chance of success” (Devlin, 2015). Part of ensuring that students learn how to swim is making sure that student support is established, systematic, strong, and readily accessible to them. Tait (2003) indicates that students in open and

distance learning want support. Student support in all forms “provide[s] a range of activity that impacts not only in terms of teaching but also affectively, that is to say, reinforcing the student’s sense of confidence, self-esteem and progress” (Tait, 2003). Likewise, teaching students how to swim means ensuring that university teachers know how to teach (Devlin, 2015). Thus, it is necessary to establish a continuing professional development as a form of faculty support to teachers in an open university.

### **The Downsides of Open Admission**

One of the issues associated with open admission is the high dropout rates. High dropout rate signifies failure on both the students and education providers (Powell, n.d). Dropout has always been a concern in open universities, and is in fact, considered as a waste of time and resources on the part of the students, education providers, and government funders (Powell, n.d.). There is a general observation that colleges and/or universities with open admission have higher dropout rates and lower graduation rate than their counterparts in the conventional education. For instance, Hare (2015) reported that dropout rates in Australia have increased significantly especially at the time when universities admitted as many students as they deemed qualified. Selingo (2014) also reported similar trends in colleges with open admission in the United States.



Downsides of Open Admission

- Completion rate may be reduced
- Attrition rate may be increased
- Quality may suffer
- Planning may be sacrificed

The second issue raised against open admission is the low graduation rate. There is also a generally low graduation rate among open universities. For instance, Kember (2007) reported that open universities in developing countries have lower graduation rates than the conventional universities. These are critical especially for colleges with government funds. As graduation rate has been used to evaluate the performance of a university or college, institutions with low graduation rates may be branded as poor performers (Selingo, 2014). In the United States, poor performing institutions are subjected to reduction of government support (Gold & Albert, 2006).

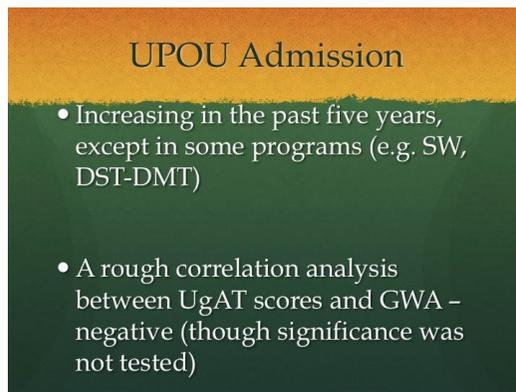
The third issue against open admission is the decreasing quality of education. When there is an increasing number of students admitted to a college or university, the student-faculty ratio also increases. High student-faculty ratio would undermine the quality of teaching, restrict faculty members to do research, and widen cynicism among teachers and students (Pechar, 2009). These cases could contribute to student and faculty de-motivation, which could affect the teaching and learning processes in a university. Consequently, teaching and learning experiences of the faculty members and students, respectively, may be affected negatively, and this could further strengthen students' learning disengagement decisions.

Lastly, the influx of many students to colleges or universities due to open admission may also sacrifice institutional planning. Since the college or university does not know how many students would be admitted, they may not be able to prepare the resources to meet students' needs.

### **UP Open University Admission: Case in Focus**

In the last five years, our admission has increased significantly, except for a few programs. Being established in 1995 to pioneer online teaching and learning, we have attracted so far several individuals in various fields, especially in nursing and communication. Among the 29 degree programs,

however, our undergraduate and the Master of Public Management programs have admission tests as part of the criteria for acceptance of an applicant. Depending on the previous qualification of the applicant, admission to the Bachelor of Education Studies and Bachelor of Arts in Multimedia Studies requires a University of the Philippines College Admission Test (UPCAT) qualification if the applicant is a fresh high school graduate, or the Undergraduate Admission Test (UgAT) if he/she already had units in college but failed to meet either the minimum number of units in college or general weighted average (GWA). For the Associate in Arts (AA), the applicant should take and pass the UgAT unless he/she has already fulfilled the minimum number of units or GWA. All other programs require a minimum GWA and/or experience for the applicant's acceptance to the program.



Given the concept of openness, there is a need to review these requirements as criteria for acceptance or rejection of an application to a program. For instance, UgAT may be excluded in the admission requirements for AA. The program could be treated as equivalent to the residential constituent universities' undergraduate certificate programs that do not require the student to take and pass UPCAT. The students are required however to finish the program first before they can be allowed to enrol in a bachelor's program. If this has been practiced in residential CUs, UPOU might adopt this practice for AA. Also, UP allows non-UP students to transfer to any of its constituent universities without having to take and pass UPCAT

for as long as they meet the required minimum number of 33 units and a GWA of 2.0. In contrast, an AA student can earn a total number of 60 units (which is greater than what is required of a transferee) upon completing the program. In effect, what I am arguing for is this: taking the AA program could be treated as taking any bachelor's degree for two years in a non-UP university, and then transferring to UP after earning the required number of units and GWA. If it will be treated in that way, then the admission test becomes unimportant. The program could then have an open admission policy. But the students in AA should not be allowed to shift to any bachelor's degree program until he/she finishes the program. By the way, a rough correlation analysis in Excel program between UgAT scores and GWA of AA students indicates a slightly negative relationship between these variables. However, a deeper study of these variables should be done and the significance of their relationship should likewise be tested. I just simply took a general picture of the relationship between these variables for the sake of this presentation.

## CONVERSATION

**Audience Reaction 1:** “Why do you have to use attrition rate as an indicator of the quality of education?” Attrition rate does not indicate the quality of education. The decision to disengage in learning is personal, and there is no way that it can be attributed to the quality of education.

**Author’s response:** One of the reasons why students disengage in an online learning transaction is de-motivation. It is possible that poorly designed courses could not motivate students, or even limit students’ engagement in the process of learning. Consequently, this leads to students’ decision to disengage as indicated by some literature, although, in most cases, students decide to drop out because of conflict in their work schedule. They had a hard time coping with the requirements of the course. In the US, however, and I think even in the Philippines, the number of graduates or graduation rates are usually used to evaluate the performance of the universities. Those universities with low graduation rate are evaluated as non-performing, and therefore, their budget allocation is being reduced. Though on the one hand, graduation rate may not reflect the quality of education of a university. It could also be assumed that when a university has a high quality of teaching, students would learn how to swim, and consequently, be able to survive up to the end.

**Audience Reaction 2:** This is the reason why our student support system should be developed. If we want to open our admission, the student support system should be strengthened. We should avoid a situation where we admit more students and then just leave them in their struggle. We know that these students have expectations when they enter the university. But once these expectations are not met, they would just be disappointed, and might be the reason for their disengagement. But if our student support would be enhanced, I believe that the graduation rate would be improved.

**Author's response:** I pointed this out earlier, i.e., the importance of student support in students' program completion. I don't support the idea that we just admit many students and just let them swim, i.e., the idea of swim or sink. I agree that when we open our admission, we are also accountable to those students who would enter our programs. UPOU as an institution should provide not only the academic support for these students but also the support that could meet their diverse needs.

**Audience Reaction 3:** If we open the admission of AA, or take out the admission test requirement of the program, then we have to make sure that our support for those admitted students are already put in place. Otherwise, the current rate of attrition in the University, which is already high, might further increase. I am for taking out the UgAT but it should be done at the proper time, i.e., when we already have a strong student support system.

**Author's response:** I agree. However, based on the correlation test that we made, though it was just a rough estimate of the relationship between UgAT scores and GWA of the AA students, it appears that UgAT is not a good predictor of the students' performance in the program. But then again, I would suggest that a deeper or formal inquiry as to the variables including UgAT that predict students' performance in AA should be done.

**Audience Reaction 4:** If we open the admission of AA, I mean if we take away UgAT from its admission requirements, do you think that it cannot be used as a backdoor entry to the University?

**Author's response:** I don't think so. But we have to put it as a policy that any AA student should not be allowed to shift to another program. They have to finish the program before they can be allowed to enrol in any bachelor's degree. The 2.5 years training under the program I think is more rigorous than taking either the UPCAT or UgAT.

As I explained earlier, we are accepting transfer students from other universities as long as they meet the minimum number of units and GWA requirements without requiring them to take any admission test. This should also be applied to AA students. So having an open admission for AA is just equivalent, and even stricter than allowing students of other universities to transfer to us. In what way? Our minimum requirement for a transfer student is just 33 units while an AA graduate would have 60 units. This is almost twice what is required of a transfer student. A transfer student has no admission test. If AA admission is being opened, the 2.5 years in the program is just like taking courses in another university, and then transferring to UPOU later, i.e., after obtaining the minimum number of units and GWA. And I think, again, the 2.5 years of training in the program is good enough for the students to enter into a bachelor's program. In that way, nobody can accuse us of being a backdoor entrance for individuals who want to enter UP. But then again, we need to consider the two important points raised earlier. One is the development of a student support system, and two is the policy that no AA student is allowed to shift to any bachelor's degree without completing the AA.

Going back to the principle of openness, I have even thought of developing a program where students are the ones who would construct their own curriculum, I mean, the mixes of courses in their program. We just need to set the total number of units and program completion requirements. The rationale behind this idea is that students know what they need, and they need only to enrol in those courses that could satisfy these needs. Some courses may no longer be relevant to them because, for instance, those courses are/were already part of their job. However, we need to have a menu of courses from which the students can select. Otherwise, there is no point of opening up the curriculum when there are only a few courses available to students.

**Audience Reaction 5:** Actually what we need is a system for accrediting students' prior learning. But I think the next presentation will discuss it. Let me just point this out now. The system should identify the percentage

of the course content that would be substituted with the experience or prior learning of the student. For instance, if the student is already a computer technician or programmer, and he/she just needs a bachelor's diploma in order to be promoted in his/her work, then s/he should no longer take any computer courses in the undergraduate program. His/her work experience should already be credited towards those courses. Unfortunately, we don't have that system yet in the university.

**Author's response:** I suggest that there should still be a form of validation to measure the knowledge and competency of the student in relation to the overall goal of the program. I just thought that it would be wise to ground the accreditation process to the goal of the program. Because, say for instance, the computer courses in the undergraduate program should not be considered independent of the other courses in the program. I believe that there is a rationale behind the mixes of courses in a program. These mixes of courses in the program are identified to achieve its goals. Hence, every competency or content knowledge of one course is complementing the competencies or content knowledge of the other courses to achieve the goals of the program. So I just thought that it is necessary to validate this knowledge or competency before the prior experience or learning can be used to substitute the learning if the student would take the course.

## **POSTSCRIPT AND REFLECTION**

To achieve the goal of the movement “Education for All,” open universities should make their admission policies more flexible, more inclusive, or more open so that each individual who wants to pursue higher education would be able to do so without worrying about her/his prior qualification. They should be accepted openly to the career level that fits their previous qualification. Open universities should be at the forefront of this movement because they are the institutions that advocate the principle of openness, and therefore, they should be the first to understand the operational implications of this principle.

However, adopting an open admission policy should be supported with a strong student support system. Universities with open admission should teach their students to swim in order to enhance program completion. The student support system should widen the opportunities or increase the chances of the students to be successful in their academic endeavor, and hence, increase graduation rates. Needless to say, this is necessary because currently the amount of support that will be given to a state university is dependent upon the number of graduates that it will produce at the end of the academic year.

Moreover, the university should maintain its academic standards despite admitting many students. It just needs to teach these students how to be successful Open University students. This is necessary because the industries and society will look at the quality of graduates that it has added to the workforce. And if it would be able to produce good quality graduates, it would be an added value to the university.





## CHAPTER 4

### A Sub-discourse on Possibilities for Recognition of Prior Learning in Open Education

Maria Mercedes E. Arzadon

#### **CONTEXT**

Open Universities are places where normative perspectives about education are disrupted. They make us realize that our long held taken for granted ideas about the learner and the learning process are based on traditional face-to-face schooling paradigm. What are these unquestioned assumptions that need to be examined? How should the learner and the learning process be redefined in an open university setting? This chapter on Recognition of Prior Learning (RPL) was presented during the Round Table Discussion Series on the Openness of open universities specifically on October 9, 2012, at the UPOU headquarters, Los Baños, Laguna. It proposed that many who come to enrol in open universities carry or bring along with them a wealth of knowledge and experience gained from various sources of knowledge, be it formal, non-formal or informal. These resources must be recognized and be used to determine gaps and starting points. This chapter explores the different ways of viewing RPL. It also describes the RPL policies, programs and mechanisms offered by the Philippine government from basic level to higher education. The author also sought to re-situate RPL three years after, examining new meanings and practices.

## NARRATIVE

The history of open universities is marked by efforts to remove barriers to learning and make education accessible to a wider population. For this reason, open universities tend to attract unconventional types of learners, including those who are unlikely to seek admission to a traditional university. Many of such unconventional learners are what you may call do-it-yourself learners who, for reasons usually related to work or interest, seek opportunities to gain knowledge and skills from various sources –workplace, short-term training, independent learning, mentoring experiences, and the like. In the past, they were most likely to be mature adult learners but now given the exponential proliferation of various online learning experiences, these unconventional learners may now include the younger and tech-savvy ones. In their case, the official transcript of records provided by the last school they attended does not accurately capture their real level of “education.” They have become what we may call now as lifelong learners, a construct which conceptualizes learning occurring from cradle to grave and from all realms of learning - formal, non-formal and informal.

### the starting point...

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- ▶ “The beginning of instruction shall be made with the experience learners already have . . . this experience and the capacities that have been developed during its course provide the starting point for all further learning”

▶ John Dewey  
(1938)



Figure 1. John Dewey’s take on prior learning

There are many higher education institutions especially among open universities that provide mechanisms for Prior Learning Assessment and Recognition (PLAR) or RPL to assess and accredit an applicant's prior knowledge gained from formal, informal and non-formal sources. The outcome of such assessment will help the person gain equivalent credits and qualification for a certain program of study. It can also be a means for existing students to waive some modules and advance in their standing in a course or program. In other words, PLAR or RPL provides alternative pathways initially for admission and, subsequently, advancement in an academic program. In other words, thru RPL, it is possible for a new student whose previous related experiences are recognized and accredited to start at the junior year, for example, of a four-year bachelor's program. This means he will spend two years or four semesters in the university instead of four. There are also times that through RPL, the institution grants a full degree. The French RPL model is known for this practice.

The 2008 Charter of the University of the Philippines included a provision on democratizing access. It shall take "affirmative steps which may take the form of an alternative and equitable admissions process to enhance access of disadvantaged students, such as indigenous people, poor and deserving students...." This provision in the UP Charter can potentially be a basis for RPL provisions in future admissions. Conceptually, RPL is not something new or strange. Educators are constantly integrating formative assessment of their students' level of knowledge and design their instruction to start where they are or to address the gaps. Students who have achieved a particular level of mastery of the subject are sometimes exempted from attending the regular class and taking further tests or provided with an enrichment activity. However, some scholars label these classroom-based practices as lower case "rpl" compared to upper case RPL which is a distinct and programmatic activity.

## **RPL and its other names**

RPL, also known as PLAR is defined as a “cluster of approaches and methodologies to identify, articulate and demonstrate the full range of achievements and capacities” (Morrissey et al., 2008). Such processes make it possible for prior experiential and informal learning to satisfy formal requirements of vocational colleges and higher education institutions (Starr-Glass, 2010). Other related terms are Assessment/Accreditation of Prior Education and Learning (APEL), Assessment of Prior Learning (APL), Validation of informal and non-formal learning (VINFL), and Prior Learning Assessment (PLA). PLAR is the term that is widely used in Canada. The United Kingdom would prefer APEL and the United States would use APL or PLA.

The practice called Assessment of Prior Learning or APL became especially popular in the US when war veterans returned to colleges and universities to resume their interrupted studies. The higher education institutions in the U.S. came together to organize CAEL (Council for Adult and Experiential Learning), and its purpose was to devise an assessment system for the mature and non-traditional students. Presently, RPL practices in the West are especially useful in assessing migrant skilled workers who come to respond to employment opportunities.

In developing countries, RPL is viewed to address access, equity and social justice issues in education. One notable example is South Africa where RPL became a means for redress during Post-Apartheid period. In the Philippines, recent policy statements view RPL as a means to improve access and to accommodate marginalized learners.

## **Philippine equivalency programs: K to Higher Education**

RPL mechanisms in Philippine educational system are embedded in the whole stretch of schooling, from kindergarten to higher education. We find the following provision in the 1987 Constitution:

“The State shall establish, maintain, and support a complete, adequate and integrated system of education relevant to the needs of the people and society... and, that the State shall encourage non-formal, informal and indigenous learning systems, as well as self-learning, independent and out-of-school study programs particularly those that respond to community needs.” (Article 14, section 2)

This particular section on Education recognizes that aside from the most commonly known formal schooling system, there exists a variety of other forms of learning systems catering especially to the needs of the community.

At the basic education level, RPL is seen as a means to address low enrollment and school attrition rates. The Global Monitoring Report or GMR (UNESCO, 2012) listed the Philippines as the 5th of the 12 countries where half of the world’s out-of-school children of primary school age are found. In terms of acquisition of basic education, only 56 per cent girls and a much lower rate of 35 per cent among the boys have completed high school education. Such low level of formal educational attainment would adversely affect employment among the youth especially that ours is a highly “credentialized” society where one’s knowledge and ability has to be legitimized by a piece of paper called “diploma.” The GMR (UNESCO, 2012) cited the initiatives of the Philippines along with France and Australia to grant a certificate of recognition of prior learning for basic education for possible re-entry into formal education. The Philippines also adopted a flexible learning program through the Open High School Program (which is one of the many alternative modalities embedded in the formal educational system).

Much earlier, in the year 2000, as part of the country’s commitment to Education for All, a non-formal education (NFE) equivalency program called Alternative Learning System (ALS) was institutionalized which

granted a certificate of recognition of prior learning to out-of-school youth and adults who would undergo an NFE learning interventions and pass the Accreditation and Equivalency (A&E) examination. The A&E is a paper and pencil examination that is conducted every year. When the program was initially introduced in the late 90's, the learner's portfolio was required for assessment. But this practice was discontinued. A&E passers are given either an elementary or secondary school diploma.

Former President Gloria Macapagal Arroyo recognized equivalency programs as one viable education reform. She said, "We have to rethink our ways of providing education amid scarce resources and go beyond the narrow confines of the classroom. We have to plan how the vision of lifelong learning rather than mere schooling can be the center piece around which our educational system can be reformed."

### RPL mechanisms - from K to Graduate School

- **Basic Education**
  - Accreditation and Equivalency Exam (A&E) held once a year. Results can either be pass or fail. Passing examinees will receive an elementary or high school diploma
  - PEPT – Phil Education Placement Test (determine one's grade or year level)
  - PVT – Phil Validation Test (for learners who are enrolled in a non-accredited school)
- Tech Voc Assessment and Certification Program / Phil TVET Qualification and Certification System (PTQS)
- Expanded Tertiary Education Equivalency and Accreditation Program (ETEEAP)

Figure 2. Summary of RPL pathways from K-Higher Ed

Other similar equivalency tests for basic education provided by the Department of Education (DepEd) are the Philippine Education Placement Test (PEPT) and Philippine Validation Test (PVT). These two tests determine the grade level of a learner. PEPT, which was conceived

in the 1970s, was meant to address the educational needs of overage school dropouts so they could reintegrate in the mainstream schools. PVT is given to students who studied in schools not accredited by DepEd.

These equivalency programs for basic education are provided by the government to serve the needs of out-of-school youth and adults, including homeschooled children, and those enrolled in an unaccredited school. There are also some private schools that manage their own equivalency programs but more for the purpose of accelerating their own students.

The framework and policies for equivalency mechanisms for technical vocational education are provided by the Technical Education and Development Authority (TESDA) but the actual assessment process is often undertaken by privately operated and accredited assessment centers found in all regions of the country. The equivalency program is called Philippine TVET Qualification and Certification System (PTQCS) which involves a process of collecting evidence of competencies based on industry standards. The variety of methods used includes but is not limited to observation, questioning, demonstration, third party report, portfolio, and written test. Meeting the requirements for all competencies in the qualifications will grant a learner a National Certificate (NC) at a particular qualification level.

And for higher education, the equivalency program is called Expanded Tertiary Education Equivalency and Accreditation Program (ETEEAP) which was institutionalized through Executive Order 330 in 1996 signed by President Fidel V. Ramos. The law recognizes that “there is a need to provide individuals with proven competence, access to opportunities that will prepare them for higher value jobs required for achieving global competitiveness, advancing strategic concerns of the State and promoting sustainable development.” The policy recognizes that ETEEAP draws lessons from the existing equivalency programs in basic education (PEPT), the dual training program of TESDA and higher education distance education programs. The policy grants the Commission of Higher Education

(CHED) the following powers and functions:

- certify after thorough evaluation, the pertinent work experiences and knowledge of expertise acquired by individuals from high-level, non-formal and informal training toward the awarding of an appropriate academic degree;
- determine the deficiencies of an applicant/awardee that would need remedial studies or academic supplementation through formal coursework in order to satisfy pertinent requirements of a degree applied for;
- develop, on a continuing basis and with the assistance of technical panels and other competent authorities, standards, creative methodologies and criteria for a diversified mode of assessing skills, values, knowledge and levels of competence which should include, but not limited to, instruments such as written examinations, practical work and/or laboratory demonstrations and qualification portfolio assessments;
- deputize and/or accredit agencies, organizations and higher education institutions which will conduct equivalency assessments, develop assessment instruments, provide academic supplementation and/or award degrees within their area of competence or specialization;
- safeguard the continuing integrity and quality measures of the ETEEAP by linking and cooperating with appropriate development and regulatory agencies and institutions;

Recent revisions on ETEEAP processes are explained in CHED Memorandum Order (CMO) 08 s.2009. It states that the program aims to come up with a “fully developed system of equivalency and accreditation in higher education” to provide a means for learners to navigate entry into all forms of education. As of now, there are 96 accredited or deputized colleges and universities that undertake assessment for ETEEAP applicants. These institutions are found in 16 regions – with concentration

in the National Capital Region (NCR), in Region 1 (Ilocos Region), and in Region 5 (Bicol Region). The CHED website provides a list of deputized higher education institutions (HEI) and a corresponding list of undergraduate and graduate programs they offer for accreditation.

### ETEEAP Assessment Procedures

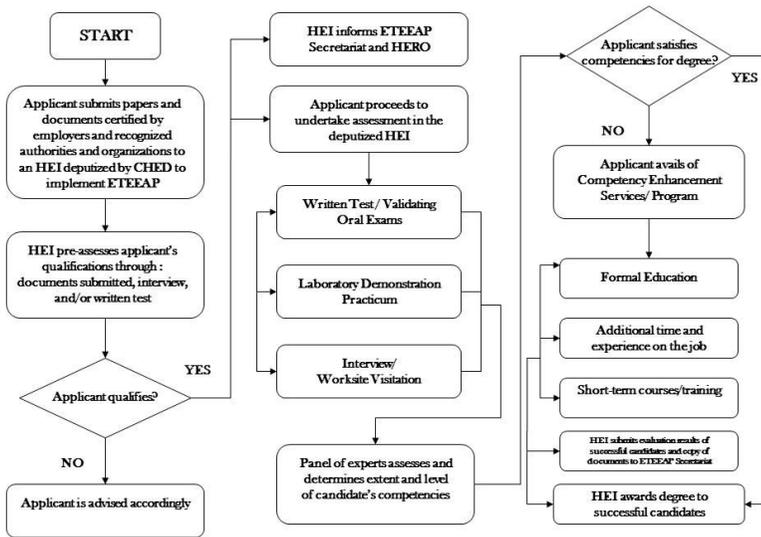


Figure 3. ETEEAP flowchart from CHED

And so, for example, a person who has been employed as a supervisor in a restaurant can apply for equivalency and transfer of credit for a bachelor's degree in Hotel and Restaurant Management (HRM) in any of the HEIs that offer the program like St. Paul University (NCR) or University of Baguio (CAR) or Cavite State University (Region 4-A). The initial interview will check evidences that the applicant is at least 25 years old and has an aggregate five years of working experience related to HRM. Once such requirements are satisfied, the person will submit his portfolio which includes various documents describing his work experience (to be certified by his employer) and various formal, non-formal and informal training and mentoring the employee has undertaken. The concerned HEI will receive the portfolio

and will convene a panel of assessors that will employ assessment strategies to examine whether the applicant’s knowledge and capabilities would match the learning outcomes and standards of a bachelor’s degree in HRM. At the end, the panel of assessors will either confer a full HRM degree or recommend classes and/or other requirements (like thesis). The number of ETEEAP graduates increased from 13 in 1999 to 999 in 2010. However, the total number of graduates so far from 1999 to 2010 is only 7,240. Many questions and issues have been raised about ETEEAP like validity and reliability of the assessment instruments, the time and cost involved, the acceptability of degrees awarded among employers, lack of training and preparation among the assessors, lack of information dissemination among its intended public, and so forth.

Reyes and Raralio (2007) raised specific issues and concerns about ETEEAP. One is the acceptance of RPL by industries and HEIs. Industries might not regard degrees granted by RPL as comparable to a 4-5 - year degree. Licensure examinations only accept formal qualifications. HEI’s may still believe that “learning values [are] lost in deviating from the teacher-student interaction in the classroom.”

Philippine Qualifications Framework (PQF)

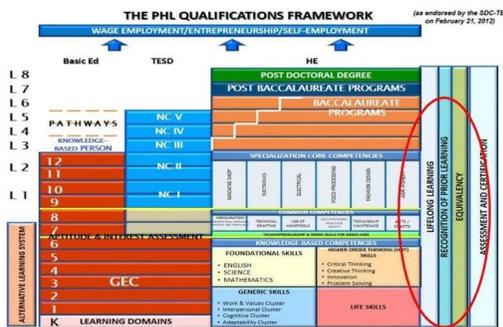


Figure 4. The Philippine Qualifications Framework (PQF)

Recently, the government institutionalized the Philippine Qualification Framework (PQF) through Executive Order 83. s.2012 which seeks to standardize and harmonize outcomes of education and training from Kindergarten to Technical Vocational Education to Higher Education. Interestingly, the February 2012 PQF graphic representation explicitly shows that it recognizes equivalencies as a means to access qualifications. For some reason, in the May 2012 version, the part that shows the equivalency in the framework was not included (as shown in the presentation of Isaac, 2012).

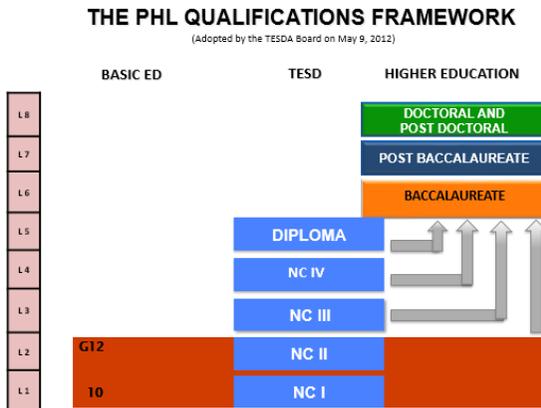


Figure 5. May 2012 version of PQF

PQF’s objective is to align our educational system with international qualifications and to facilitate international mobility of workers through increased recognition of the value and comparability of Philippine qualifications. The policy papers on equivalencies do not hide the fact that it serve the interests of the global market. Being linked to human capital and lifelong learning discourse, it presupposes that the workplace in a deregulated environment is unstable and unpredictable. Given that education especially at the tertiary level is also deregulated (with less state intervention), individuals are expected to tend for themselves and make sure that they are flexible and adaptable to changes. With the intense competition in the global market and new temporary and contractual

employment arrangements, the focus has shifted from “security of tenure” to “employability” and competitiveness. Such provide the pressure to be a lifelong learner, to be open to retraining and redirection. And equivalencies would facilitate such a process. Also, given the rate of migration and cross-country employment, equivalency programs would provide opportunities to migrant workers to have their previous education recognized and compared to standards of the receiving countries.

### **The RPL Dichotomies / Continuum**

RPL models can be analyzed through dichotomies or through a continuum. One way is to classify them according to Anderrson’s (cited in Stenlund 2011) convergence – divergence. The convergent RPL model is interested in whether a person knows or can do something that conforms to the criteria or standards of the assessing institution. It is evidence based. The divergent model, on the other hand, is concerned with discovering what the person already knows. It is process-based. The convergent model is connected to a summative type of assessment while the divergent model uses a formative assessment. Aligned with convergent model is the credentialist approach and at the other end is the transformative and radical. In between is the developmental approach.

### **Credentialist and Developmental RPL Model**

“Credentialism” is defined as “the over-emphasis on certificates and degrees as evidence of an individual’s qualification to perform a certain job or attaining social status.” It is similar to “diploma disease,” a term popularized by Ronald Dore in his book “The Diploma Disease: Education, Qualification, and Development” (<http://sociologydictionary.org/>). It seems that the RPL practices described in Philippine policy papers emanate strongly from a credentialist (or credit exchange) and convergent orientation. It is sometimes described as ‘procrustean’ alluding to a Greek mythological character who invited passing strangers to sleep in his house and forced his guests by disfiguring their body to fit into his special bed.

## Dichotomies / Continuum

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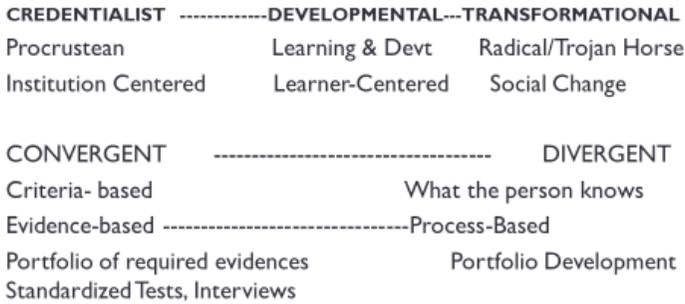


Figure 6. Perspectives in classifying RPL approaches

There are three possibilities under a credentialist model. The college course model involves matching one’s competencies with specific college courses, using the course syllabi to guide them. The learning components mode allows the applicants to compare what they have to a particular program or academic discipline. And finally, the block credit model requires students to match their claimed college learning with somebody who has just graduated from college and is employed in that particular field.

The credentialist model is strongly behaviorist and perceived to be most favored by HEI administrators because it can efficiently provide a relatively neat and straightforward way of quantifying credits to gain access to a particular program. However some educationists find such approach problematic because it tends to privilege codified school knowledge and status quo, ignoring or minimizing knowledge generated by experience and local cultural communities.

The usual methods of assessment of the credentialist model are challenge examination (summative assessment), performance tests, site visits and

portfolio (dossier of evidence). The portfolio is a collection of evidences to support one's claim of learning outcomes. The evidences would include the following:

- Formal statements of results
- Sample of work produced
- Performance appraisal reports
- References from current or previous employers
- Job descriptions
- Details of formal training, seminars, conferences and workshops attended which are relevant to the RPL application
- Certificates of participation/achievements/awards letters of recommendation
- Video tapes, tape recordings and/or photographs of work activities
- Specific details of work and/or participation in projects
- Written testimonials from managers or colleagues, written papers, articles, reports, case studies
- Written observations of learner performance contributed by the instructor or assessor
- Examination or test papers and results
- Learner journal, memos, or personal responses
- Videotapes of learner actions or presentations
- Assessment inventories (such as personality or learning style inventories)

Instead of focusing on the credit and evidence, alternative models shift their focus to access and process. One example is the developmental RPL model or sometimes called Credit Exchange Plus. The developmental model is closely linked with Adult Education ideology, thus informed by the learning theories of John Dewey, Malcolm Knowles and David Kolb. It emphasizes self-actualization and the democratization of education.

This model requires an individual to probe deeper into his personal experiences after undergoing a series of reflective experiences like journaling, writing one's life history, picturing, letter writing, interviewing and so forth. His portfolio will include reflective essays about his knowledge and abilities gained through his prior learning experiences and through the RPL process itself and how such knowledge is translated and formulated into codified propositional knowledge. In this model, RPL becomes a learning process in itself. The portfolio is a vital learning and assessment tool not only for admission purposes but in the whole stretch of an adult education program (Fenwick, 1996).

Athabasca University (AU) in Alberta, Canada is one example of an open university that provides opportunities for a 'credentialist plus' RPL to its undergraduate students. Their PLAR program started in 1997. Students create their learning portfolios which enable them "to engage in sustained, thoughtful, and puzzling reflection to make sense out of past learning experiences and link them to current endeavors and future aspirations" (Conrad, 2008). Portfolio development nurtures "meta-cognitive abilities and degrees of confidence, self-esteem and self-awareness." The portfolios previously examined by AU's Centre for Learning Accreditation (CLA) are assessed rigorously by independent subject matter experts, at least three for each applicant. Both students and assessors refer to a set of criteria framework.

- ▶ ...over-emphasis on the assessment of predefined outcomes have robbed qualifications of the capacity to incorporate the open-ended learning necessary for societies experiencing perpetual change. Given the pace of change 'new kinds of learning may need to be encouraged that cannot easily be predicted in advance and may not be readily assessable for qualifications This means we need to place less emphasis on the prior specification of learning outcomes, and more 'on learning processes and the judgements of different stakeholders'

(cited in Wheelahan, 2006)

Figure 7. Outcomes vs. Process

PLAR, a more common term in Canada, is embedded in AU's policies and is accompanied by a set of rigorous procedures and regulations. AU has installed two levels of oversight to their PLAR process. There is an internal council whose membership comes from AU's academic areas and there is also an external advisory committee from PLAR-relevant sectors and institutions across Canada. PLAR processes are undertaken by the CLA which is managed by a Director with a Ph.D. degree.

Transparency and accessibility mark the whole process. All related PLAR materials like templates, examples of completed work, and assessment tools are uploaded in AU's PLAR website. The support system includes advising services and the provision of a CLA coach/mentor who guides an applicant in the whole process. Support can also be obtained through telephone and email. At the end, PLAR applicants and completers are invited to provide feedback about the whole PLAR process through an anonymous web survey tool. Applicants who are not happy with the results of the assessment process can appeal their case. The United States (US) started with a developmental approach and is moving towards credit exchange while the United Kingdom (UK) has always been using the credit exchange model. Canada is using both models in a complementary manner (Janakk, 2011).

The credentialist model is criticized for its limitations. Wheelahan (2008) pointed out that knowledge is removed from its context, its community of practice and the identity of its knowledge producers. It is co-modified with a given exchangeable market value as determined by its buyers. It is blind to the social change vision of education since it does not acknowledge the issues of equity and redress (something that is articulated strongly by South African RPL scholars). Those who stand to benefit from a credentialist model tend to be individuals with more formal education experience and life skills that enable them to present and assert for recognition of their prior learning experience. Furthermore, the model is organized around HEI's standards, its codified and disciplinary knowledge which would not correspond easily to the nature of experiential and situated learning.

And, finally, the model is viewed by its critics as deficit in its orientation since the knowledge presented by an individual can only be made valid and legitimate if it is molded and made 'equivalent' with the codified academic knowledge of an educational institution. This sustains a stratified view of knowledge where disciplinary knowledge maintained by elite academic system is more valorized compared to knowledge gained from work, community or indigenous learning systems.

### Interrogating learning within a COP

Learning... is also about developing shared and individual understandings within the **community of practice** or activity system.... It also means learning about power relations in the activity system, and developing a critical capacity for exploring good practice. Learning is more complex and multi-faceted than many traditional notions of curriculum suggest. ... Students need to interrogate their past learning and reflect on it in light of their current learning, and consider the implications for their learning histories and their trajectories (Wheelahan, 2006)

Figure 8. Interrogating Past Learning

### **Transformative/Radical RPL Model**

An alternative to a credentialist model is described as transformative or radical RPL model. It values informal and non-formal learning, including indigenous knowledge on its own terms as valid academic knowledge. In this context, prior learning is evaluated in terms of its emancipatory and transformative potential and not whether it corresponds to knowledge found in a school-based formal curriculum. It values participation in social movements and activities that promote equity, social justice, diversity, environmental protection, culture and the like. Such experiences will be examined by their power to generate insights and new knowledge. The radical RPL approach (including the Trojan Horse model to be discussed later) was popularized by South African scholars as post-apartheid redress effort to facilitate access to education to people who were marginalized

by apartheid ideology. It was a means to recognize and value indigenous and local knowledge gained through informal means that was set aside because of unequal power relations (Blom, Parker & Keevy, 2007).

The radical model views all knowledge systems as co-equal. The more formalized and institutionalized ones are seen to be of the same value as the body of knowledge produced by an indigenous group, for example. A transformative model brings to the surface the “politics of difference and the struggle over legitimate knowledge.” There is a danger that during the APEL process, informal learning would be framed, valued and reconceptualized according to the form of codified academic knowledge. Based on transformative RPL model, indigenous knowledge about healing and wellness does not need to be validated by modern medicine. However, swinging to the other side of the pendulum can be limiting too. Experiential and informal knowledge may be idealized and thereby may ignore the value of formalized knowledge (Osman, 2004).

A less radical and more inclusive approach is the Trojan Horse model. This recognizes that knowledge systems have “permeable knowledge boundaries.” This allows curriculum flexibility and practice-based learning programs. It views experiential and disciplinary knowledge systems as unbounded and contestable working towards a negotiated and flexible curriculum. Radical RPL approaches would often generate qualitative marginalized knowledge through interviews, focus group discussions, collages, narratives, life histories, dialogue and artistic forms of self-expression like music and dance (ibid).

## CONVERSATION

**QUESTION 1 (Teacher):** How open are our own educational leaders to RPL practices? What about private corporations? Has RPL been known to them, especially those who have ties with schools?

**Author's response:** In my own experience as a lecturer and resource person on prior learning, I found that the concept, especially our policies and programs on RPL, are not yet known to most people. It's sad because we have been implementing these practices for a long time now and yet not so many are aware about them. One time my husband, who is a Human Resource Practitioner, was telling me their dilemma about a certain employee who was due for promotion to a top leadership position because of his sterling performance. He was hired under the old management and at that time, the company was not keen about college diplomas. They were more concerned with the person's capacity to do the work. That was 20 years ago. Now with the new management and probably due to trends on standardization and credentialization, the company requires a college degree for the said position. I suggested that the employee should try to apply for a degree through ETEEAP. He did and after a year of assessment and attending some classes, the employee received a degree and was promoted to a leadership position.

**QUESTION 2 (Teacher):** Although the Department of Education curricula mentioned using the children's schema as a springboard for learning, most of the contents are still translated western/Eurocentric knowledge. As regards assessment in RPL, it has to be localized not only because of the differences in languages but also due to the differences in values and local knowledge found in local communities.

**Author's response:** Yes, I agree. You are referring to the lower case rpl. which considers the child's prior knowledge as the starting point for instruction. Yes, any teacher should consider what his pupils already know which is usually expressed through the local language. The child is not a

blank slate because he has at least five years of learning from his family and community. About the upper case RPL and indigenous language and knowledge, as I mentioned earlier, South African scholars are suggesting that such knowledge might not be packaged in a written codified text couched in academic language but through indigenous art forms. It can also be embodied in a person. However, I still have to see how it can be operationalised. Usually the tendency is to examine these knowledge forms using the academic perspective as the starting point. As argued by radical RPL models, local knowledge should be recognized and valorised as it is. Maybe one way to do it is to create a certificate or diploma course called Indigenous Arts for exemplary village musicians or craftsmen/women or a certificate on Indigenous Leadership for village chiefs or elders like the ‘mambunong’ in some areas in Benguet who perform both healing and leadership functions. It can also be awarded to exemplary ‘bodong’ practitioners in Kalinga.

**QUESTION 3 (Graduate Student):** As was mentioned in one of the slides, it is ideal that RPL involves not only recognition but a “process of development” as well. What then are specific examples of suggested staff development practices that may enhance/further one’s growth with his/her acknowledged prior learning?

**Author’s response:** Some institutions provide a series of workshops and an RPL coach for each learner. Through participation in workshops and guidance from a coach, the learner is able to develop his portfolio for assessment. Maybe something like this can be adopted in an organization that wishes to include RPL as part of staff development. These workshops can include generative activities and prompts to enable the person to recognize what he actually knows and to determine gaps that he can work on. TESDA posts its training regulations along with a specific set of competencies for every qualification. A staff member who wishes to receive a National Certificate in Bookkeeping, for example, can examine the required competencies with the help of a coach (his supervisor or HRD specialist) and identify what he/she knows and what he/she

lacks. The HRD department can provide learning opportunities like internship or mentoring relationships so that the employee will acquire all the competencies and be able to apply for TESDA's RPL program called Philippine TVET Qualification and Certification System (PTQCS). I think companies should revisit their own in-house training so that the programs they offer will potentially earn higher education credits. TESDA Dual Training System allows joint efforts between HEI and an accredited company can provide a model for the HRD program. This is also useful for planning for the development of 'para-teachers' volunteers helping in community-based literacy programs. The short term training that they receive can be converted to college credits so that they can finish a degree in Education and take the licensure exam for teachers.

**QUESTION 5 (UPOU Staff):** What would be the pros and cons of RPL practices to the students of an open university like UPOU?

**Author's response:** For the student, RPL when applied at admission level will enable her/him to skip courses and learn according to her/his level. This would save time and money. UP provides Advance Placement Examination (APE) for certain courses in Math/Science and Language for its freshman students. Usually students coming from science high schools would take the tests and would easily pass them. If such mechanism is not available, students are forced to endure sitting in a class listening to something that they already know. Learning should be something challenging and motivating, especially if we want to produce lifelong learners. Albert Einstein had to skip classes because he was studying more complex math and physics on his own. He was marked absent in class, but he was actually learning. Unfortunately, his absences and poor grades denied him the opportunity to take a post in the university after his graduation. If universities like UPOU implement RPL opportunities, then it can attract non-traditional students, especially those who have been working for years in various industries. These students can share the wealth of knowledge they have gained from actual practice and can enrich and contextualize the course content.

## **POSTSCRIPT AND REFLECTION**

RPL as a separate program is initially seen as an unproblematic measure that addresses adult learning concerns. It is a means to save time and resources since a person does not need to relearn something that he already knows. It also departs from a deficit view of education that views the diploma as the only evidence of learning. It assumes that “every place is a learning place and every person is a learner.” Such asset-based perspective boosts the learner’s confidence, affirming his ability as a lifelong learner and motivates him to identify and address the learning gaps. RPL would also open opportunities to seek better jobs. However, when RPL is theorized from the perspective of political economy and social justice, we begin to see contradictions.

To revisit Recognition of Prior Learning as a conceptual and a practice domain, I examined cases of RPL programs as practiced by Workers College at Durban, South Africa, and the known ETEEAP leader in the Philippines – the Manuel S. Enverga University Foundation (MSEUF). I also sat down with some RPL authors (whose works I cited earlier) from South Africa and Australia during an international conference on workplace learning in Singapore. Insights from their presentations and our discussion have been added to this paper.

### **Case Study 1: The Workers College At Durban, South Africa**

One interesting means of instituting RPL in the post-apartheid period in Africa is the establishment of Workers College. One example is the Workers College at Durban, Province of KwaZulu-Natal, South Africa. (<http://www.workerscollege.org.za/>). The institutional brochure that can be downloaded from their website includes a paragraph on RPL. It reads:

The Participants on the programmes of the College come with a variety of knowledge, experience, skills all borne out of personal and organisational struggle. To this end the College

gives Recognition to the concept of Prior Learning (RPL) which is defined as follows: recognition of people's individual and collective experiences, beliefs, knowledge base, values, practices, culture; create an environment where such recognition is allowed to prevail; allow such experiential knowledge to engage critically with conventional knowledge on equal footing; inculcate a sense of self-respect, self-esteem, self-reliance, and collectivism; moving towards finding solutions using our prior learning and conventional learning and seeking alternatives. The Workers' College, in adopting the concept and approach to RPL, is committed to including the principles and practices of RPL into its education programmes, especially the diplomas.

The Workers College was originally a part of the University of Natal, Durban (now the University of Kwa Zulu Natal [UKZN]), but it became independent and became a separate institution in 1991. The College was established to address the unique learning dynamics and to recognize the knowledge and experiences of workers from trade unions and community-based organizations. Usually these workers attend a short training without any form of assessment, and with little or no continuity or follow-up.

The Workers College offers four one-year diplomas equivalent to a level five National Qualifications Framework (NQF) qualification. These are: Labour Studies Diploma (LSD), Labour Economics Diploma (LED); Political & Social Development Diploma (PSDD), and Gender & Labour Studies Diploma (GLSD). Once a student completes at least one diploma program, the learner can pursue a degree program - Industrial Working Life Programme (IWLP) - a joint effort of the University of KwaZulu-Natal (UKZN) and the Workers' College. RPL is applied at the pre-entry stage where the activist's experience is prioritized, within the diploma programs (the learner's knowledge and experiences engage into a mutual dialogue with conceptual academic knowledge) and at the end of the program when learners are provided access to a higher education degree. Boffel et al.

(2013) describe how prior learning is an essential part of the educational experience:

The educational philosophy of the College is to begin with learners' struggle knowledge, to reflect on it, validate it through peer engagement, and link experiential knowledge to radical political theories of social change, as well as to the codified knowledge base of academia. In this process, new knowledge is generated with which the College aims to build an alternative knowledge base that can interact with, and enrich formal disciplinary knowledge bases, giving them greater relevance for College learners.

Pedagogical methods include role-plays and simulations of actual work and community environments, sharing of own stories and struggles using any medium or form of expression, case studies of actual experiences like strikes and campaigns, and analysis of policies and practices of actual community based organizations. The students found their experience in the Workers College as friendly, non-threatening and encouraging. The facilitators and administrators become co-equals. They also appreciate the non-discriminatory environment. Challenges include the use of text-based tools and the nature of assessment like assignments and examination. In this context, RPL is not seen merely as a means to seek credit but for emancipatory purposes.

### **Case Study 2: Manuel S. Enverga University Foundation, ETEEAP Champion**

Napoleon Imperial, one of the top officials of the CHED, has been an advocate of RPL and alternative modes of education. He led in drafting the policies on ALS and the ETEEAP. He would often cite the RPL initiatives of the Manuel Enverga University Foundation (MSEUF), calling it as the ETEEAP Champion.

CHED defines ETEEAP as “a system for recognizing and accrediting skills and giving equivalency to competencies acquired from relevant work or experience outside the formal education system.” The program is being implemented through deputized HEIs that award the appropriate college degrees to students who meet the requirements. In AY 2013-2014, there were 94 deputized HEIs that implemented the ETEEAP with 76 programs offered at the undergraduate level (CHED, 2016).

Given such strong recommendation from Mr. Imperial, I, along with Jamsie Joy Perez from the UPOU, travelled to Lucena City to interview Dr. Belinda Villenas, the Vice President for Academics of MSEUF. She is also the head of CHED’s ETEEAP Technical Panel. Dr. Villenas narrated their journey in establishing ETEEAP in their area, their initiatives to put in place the standards procedure, their impact to their graduates and lessons learned along the way. She also brought us around the campus to survey their ETEEAP facilities and showed us the theses produced by their graduates.

### ***Beginnings***

When the university officials of MSEUF received a copy of the ETEEAP Executive Order which was signed in 1999, the first thing they did was to sell the idea of RPL to their faculty members. Initially, there was resistance because of what Dr. Villenas described as the tendency of university professors to be “turfist.” But at the same time, from their own experiences, they felt that the policy was addressing a real concern among their graduates. Many of them reported that they could not enjoy the full economic benefits of their work because they lacked the required diploma. For example, they graduate with a three-year technical course like “Civil Technology” or “Industrial Technology”, but they are doing quite successfully the tasks of an engineer. Many of them are Overseas Foreign Workers (OFW) and they reported that they performed better than their co-workers from other Asian countries but cannot receive the same benefits because they lack a bachelor’s degree.

Since CHED did not provide them with any operations manual to implement ETEEAP, MSEUF in 2000 made their own manual along with the corresponding learning package, and a set of supporting processes. The operations manual they made was later adopted by CHED. Dr. Villenas had opportunities to travel abroad for learning and benchmarking with an educational program for an Appalachian community in the United States and the Learning City of South Korea.

Though the ETEEAP Policy allows for RPL for postgraduate degrees, MSEUF decided to offer undergraduate level courses only. They are open to the possibility of offering master's degree level programs in the future. The policy states that an applicant must be at least 25 years old and has been working for five years. He will apply for a course that is related to the nature of his work. Usually, an applicant will go to the CHED ETEEAP office for initial screening and he will be directed to a particular university in the region.

### **Processes**

A prospective applicant in MSEUF will have to go through the following steps:

1. Fill up an initial application form and attach pertinent supporting documents (certified by the company or organization involved).
2. The ETEEAP office will assess the application form and the documents against the pre-qualification accreditation criteria. If he qualifies, the applicant will fill out a more elaborate application form from CHED.
3. The ETEEAP office will give equivalent points for every accomplishment, training attended.

4. If the applicant qualifies, he takes a General Education test and a Professional Assessment in the discipline he is applying for.
5. A panel (registrar, ETEEAP office director, dean of the program, external assessors from the industry) will be convened to assess the level of competency based on the TOR, certificates of non formal education programs attended, skills demonstration, workplace visit (interview HR, supervisor, co-workers).
6. If the applicant qualifies, he will take the enrichment courses (based on the gaps) which include monthly face-to-face meetings for one year. The first semester would include a General Education Refresher Course and the second semester would be specialized courses according to the specific degree the student is applying for. In case the student will travel overseas for training or for a business meeting, the schedule of classes will be adjusted to suit the student's own work load or the student can continue the program through printed or online modules.

An ETEEAP student will pay the amount of 28,000 pesos for the first semester. The amount includes registration, assessment services (application, registration, portfolio documentation, verification and advising) and a flat rate tuition. The same student will pay 26,000 pesos for the second semester. The total fee can be paid in four installments. Filipino students based overseas will pay a bit more for the same services plus the cost for the teacher's use of internet and technology - 32,520 pesos for the first semester and 31,000 pesos for the second semester.

ETEEAP learners are placed together in exclusive enrichment classes. They learn together with their peers who are mostly mature adults and have similar work-related concerns. MSEUF opens its library for the weekend enrichment classes. It also makes its dormitory available to the weekend sojourners. Though online facilities would make the program attractive to

foreign students, the ETEEAP policy limits its services to Filipino citizens only.

I interviewed one ETEEAP graduate of MSEUF, Mr. Melo Acuna, a known leader in media - a Correspondent at China Radio International, the Station Manager of Radio Veritas, and now the Catholic Bishops' Conference of the Philippines (CBCP) Online Radio Director. He began his college education at MSEUF but was interrupted when he responded to a career-related opportunity. When his wife began to pursue her Ph.D. studies, he thought of going back to MSEUF to complete his college degree through the ETEEAP option. Though he was already a seasoned media practitioner, he found the classes enriching. He enjoyed the experience of travelling with his wife to Lucena to attend the once-a-month enrichment classes. Later, he joined the ETEEAP Technical Panel and became a poster boy of ETEEAP.

### ***Highly Experienced Mature Adult Learners***

The ETEEAP applicants that come to MSEUF are mostly from the Export Processing Zones around the CALABARZON area. There are also many from national and local government offices stationed in the region. There are periods when they have many learners from the Philippine National Police (PNP). Applicants who come to MSEUF have on the average eight years of work experience (the ETEEAP policy requires only five years). There was one municipal counselor who came to apply for ETEEAP. He had 28 years of experience and he could recite from memory the Local Government Code.

One concern of Dr. Villenas is the possibility that the learners would be more knowledgeable than their teachers. And so what she does is to assign faculty members who have a strong industry practice and can confidently handle a class of mature adult learners. At the same time, however, the manner of teaching/learning should be collaborative in nature. The teacher does not have to be all to his students but must also see him/

herself as a co-learner, which is a fundamental principle of Andragogy or adult teaching/learning. The students in the class are urged to share their knowledge and experience with their classmates and teachers. Actually the content of the ETEEAP Learning Package comes from the students themselves. When a Learning Package is being evaluated, students are asked to share their input. It is interesting to note that though most of the students are mature and experienced, they would appear less confident when compared to the regular student or graduate, even when they pass the board exam. Dr. Villenas would often give a pep talk to let them realize their worth. “I tell them, ‘you are going to stand at the same level with regular graduates. Compared with the regular students who had only 450 hours of on-the-job training, you are far better.’”

ETEEAP graduates are provided with a pre-board examination evaluation. If they are deemed ready to take the test, they are encouraged to take the board examination. There are 78 board passers among the ETEEAP graduates in the area of Professional Education, Criminology, and Engineering. Passing the board exam will be an affirmation that they are at par with the regular graduates. However, some do not take the board examination anymore because they need to leave immediately to work overseas. Besides, passing the local licensure exam is not a requirement in their overseas assignment. We are the only country that is “licensure crazy.”

Indeed, Dr. Villenas is keen on removing the unequal treatment between regular and ETEEAP graduates. She recommended removing the note “finished under ETEEAP” in their diploma.

### ***Maintaining Quality***

MSEUF has installed standard operating procedures. Knowing the proliferation of fake documents, the admission office does background checks to verify the authenticity of documents and veracity of information submitted by ETEEAP applicants. Member of the assessment panel

conduct actual work site visits and interview the Human Resource officers, the immediate supervisor and the co-workers of the ETEEAP applicant. In some cases, they even visit past employers. They make sure that thesis requirements should be complied with. We were brought to the room where the theses of the students were shelved. We also viewed one video documentary of the ETEEAP program made by one graduate, a known media person.

There is this observation that the ETEEAP programs run by other deputized HEIs do not have the necessary control and thus give the impression that these HEIs have become diploma mills. They make the students pay but they do not provide a learning enrichment program. Dr. Villenas deplored the fact that for a long time there was no strong quality assurance and deputized HEIs were virtually left on their own. The second batch of ETEEAP Technical Panel of CHED has been conducting visits to address this concern. They are running a nationwide training program and they are providing a sample operations manual developed by MSEUF. The deputized HEI can enrich it based on their own vision, mission, goals and any charter they have adopted. The panel is planning to issue a memo imposing a moratorium on issuing permits until quality assurance measures are installed. What Dr. Villenas found to be reprehensible is how some HEIs are charging exorbitant fees. ETEEAP is meant to address educational access for the poor and underprivileged learners.

Challenges in implementing ETEEAP include the extremely busy schedule and mobile work arrangement of learners. There is also the tendency to take short cuts and undermine the whole RPL process.

### **15 Years of ETEEAP: Some lessons learned**

The ETEEAP program in MSEUF has indeed become known as an exemplar in RPL. The ETEEAP program of MSEUF is being promoted through their own website. They also found that the ones who are actively promoting the program are ETEEAP alumni. Since it started in the year 2000, MSEUF

has provided second chance schooling and conferment of a bachelor's degree to 2,000 learners. Right now the ETEEAP is granting a second degree especially to government employees whose bachelor's degree is not related to their present position. Some PNP personnel, for example, cannot be promoted to a higher rank unless they complete a BS Criminology degree.

Championing and developing ETEEAP for the Philippine setting for the past 15 years have generated some lessons and valuable insights, according to Dr. Belinda Villenas. One insight is that education in the Philippines cannot just be delivered through the traditional pathways. There should be a radical paradigm shift to make education accessible and relevant. She said that they learned a lot from their own learners. Alumni can actually enrich the curriculum offered in the universities.

### **Conferencing with the RPL Scholars**

It was in the 9th International Conference on Researching on Workplace Learning held in December 2015 (see <http://rwl2015.com>) that I met some scholars and authors whose works I had read and cited in my original presentation. The conference on workplace learning featured at least seven papers that presented RPL as their main construct and a few more cited RPL as a subtopic. The studies on RPL come mostly from South Africa, Denmark, and Australia.

### ***The European RPL Policy***

The presenters from the European Union (EU) countries mentioned the recommendation to all EU members to put in place a system of validating non-formal and informal learning by 2018. Olesen (2015) explained that the whole system involves two components. One is an “all-embracing qualification frameworks, which allow comparison across national systems and between qualifications obtained through formal education and non-formal/informal activities.” This means, for example,

that learning obtained through a certain formal course of study in higher education would have a standard equivalent with learning obtained from the workplace and some other non formal and informal learning experiences. The other component involves processes of recognition and validation of prior learning/competence assessment that correspond to the all-embracing qualification framework.

The policy recommendation regarding the establishment of validation of prior learning by 2018 was issued in 2012. Leth (2015) described the move as a means for EU “to regain competitiveness in the global economy.” The policy paper mentioned as its basis the acknowledgement of greater interest for lifelong learning, especially among the “socio-economically disadvantaged or the low-qualified.”

One paragraph reads:

“At a time when the European Union is confronted with a serious economic crisis which has caused a surge in unemployment, especially among young people, and in the context of an ageing population, the validation of relevant knowledge, skills and competences has an even more valuable contribution to make in improving the functioning of the labour market, in promoting mobility and in enhancing competitiveness and economic growth “(Council of EU, 2012).

The policy also identified the key stakeholders that can facilitate the RPL processes along with special population who are to benefit from the program.

“Employer organisations, individual employers, trade unions, chambers of industry, commerce and skilled crafts, national entities involved in the process of recognising professional qualifications and in assessing and certifying learning outcomes, employment services, youth organisations, youth workers, education and training providers, as well as civil society organisations.

...individuals who are unemployed or at risk of unemployment have the opportunity, in accordance with national legislation and specificities, to undergo a 'skills audit' aimed at identifying their knowledge, skills and competences within a reasonable period of time, ideally within six months of an identified need" (ibid).

Leth (2015) related that in Denmark, RPL made changes in the admission requirements in higher education such that students without formal upper secondary education can be accepted on the basis of RPL. These students, usually in their 20's to mid 40's, have been called "non-traditional learners." I thought that this initiative is quite radical and can unsettle our long unquestioned belief that a high school diploma is an absolute requirement for college admission.

### ***Pre-design Issues***

Another paper that addressed RPL in the context of social justice was about the RPL practices among various sectors in a northern territory in Australia occupied by indigenous communities. The setting is marked by inadequate educational services, high turnover of teachers, lessening support for indigenous communities and the imperative to promote indigenous knowledge, pedagogies, and cultural practices. The RPL initiative concerned two occupational cases with school leaders/teachers and practitioners who are teaching adult language literacy and numeracy (LLN) skills across vocational training, workplace and community sites. The RPL program radically shifted from the norm where students are seen to do the groundwork of going 'cup in hand' to beg for recognition for their learning. Instead, the issue of pre-design was embedded in the whole process. This means that various sectors had to engage in collaborative planning prior to course structure (Shore, Fry, Sushames & Frawley, 2015).

## **A More Nuanced Approach to RPL**

Scholars from South Africa like Linda Cooper and Judy Harris presented results of their ongoing study on RPL practices in South Africa. Cooper reiterated what she had written in the past that RPL in South Africa is “a political discourse of transformation, to redress past injustices and ensure effective access to learning for those who were excluded by the policies and practices of apartheid.” It was also about accreditation and lifelong learning, to make visible and certifiable knowledge and skills that are acquired in contexts outside formal schooling. It is also about integrated National Qualifications Framework (NQF).

Seen as a form of redress and social justice, South Africa began its RPL program with much enthusiasm. After 10 years, they found that too little was happening and no upward scaling of RPL efforts was taking place. They realized that the task of popularizing RPL was more complex than what was anticipated. They asked if it was a matter of political will or some form of epistemological constraints. To answer their queries, they conducted a research to examine the feasibility of RPL across various disciplines (one research site was the Workers College.) They generally hypothesized that the nature of knowledge in a particular discipline would determine its openness to RPL. A previous study shows that RPL is frequently more common and more successful at a postgraduate level because the curricular focus is on contextualized knowledge and skills that are linked more closely to the point of application than in the case of a bachelor’s degree.

Harris provided several dimensions of knowledge against which they analyzed the nature of a particular discipline. These include horizontal discourse that is context-specific and related to everyday life and work. The vertical discourse is the codified, formal discourse of institutions. There is also the notion of weak and strong boundaries which refers to the degree that a particular knowledge is insulated from other knowledge domains. The distance of a particular knowledge system to its foundational disciplines

and to its point of application is another dimension. The study on various disciplines revealed that there is high RPL feasibility for disciplines that are based on contextual knowledge like Journalism and Tourism, medium feasibility for Social Work and Business and low feasibility for Nursing and Sciences. Other factors that affect RPL feasibility include the presence of RPL champions, conservativeness of faculty members, and openness of professional and regulatory bodies. Previously, Cooper and Harris (2013) mentioned about pedagogic agency as one mediating factor.

Harris admitted that what she wrote previously about the Radical models was a bit simplistic and now she would instead recommend a more nuanced approach based on a thorough analysis of the structure of a particular knowledge domain and contextual factors like the presence of RPL champions, openness and pedagogic agency.

When the issue about access versus credit was raised, Cooper mentioned that based on their studies on RPL in South Africa, they thought that it is more recommendable to use RPL for credit purposes rather than for access. It means that it is better and would provide more possibilities for a student to seek admission first and later use RPL for transfer of credits rather than depend on RPL as a means to gain access into a particular program. Another issue that I raised during the conference was how to work out and make operational the recognition of informal and indiegnous knowledge in the program. Linda Cooper suggested that these forms of knowledge can be accredited as equivalent to elective courses.

## **Conclusions**

The RPL programs disrupt a number of assumptions and practices that have been considered as given or the norm. Since education is a right, it means that other forms of education (not just formal) should be recognized and legitimated. However, I agree with Cooper and Harris that a more nuanced approach is needed. This implies the need for research to determine what courses are more “ETEEAP-able.” CHED’s boasts that

it has provided a degree to almost 10,000 students since 1999. However, we do not have any record how many applied and did not qualify. Basic Education's equivalency tests like PEPT and A&E are benefiting only a fraction of out-of-school youth and adults. One reason for the poor output is the limitation of assessment tools to paper and pencil tests (Arzadon & Nato, 2015). A more authentic, formative forms and localized forms of assessment should be considered. Schools divisions should be trusted to formulate their own RPL and equivalency programs. Vocational and work-based learning experiences should be included as avenue for learning and assessment.

The new Ladderized Education Policy seems to be promising in integrating basic, middle level and higher education, providing flexible, smooth, and alternative pathways to obtain higher qualifications. The implementing agencies and private educational institutions involved in the ladderized education scheme should think beyond the "school box" and consider bolder possibilities to make the scheme flexible, affirming and responsive to the realities of the marginalized learners.



## CHAPTER 5

### A Sub-discourse on **Multiple Entries and Exits and Open Curricula**

Cesar Z. Luna

#### **CONTEXT**

Let us begin by defining terms. An educational program is said to have multiple entries if it allows the learner to enter a program at any time and does not require the learner to begin with foundational courses before proceeding to higher-level courses. On the other hand, if a learner may exit the program at several points and earn a certificate corresponding to the set of courses completed, the program contains multiple exits. An open curriculum allows the learner to select courses to take, in effect encouraging the learner to design his or her own program in part or in whole.

This presentation aims to persuade the academics among the audience, particularly the program chairs, to adopt applicable concepts of multiple entries, multiple exits and open curricula into your programs. I single out program chairs because it is your duty to evaluate and revise your program every three years. Any adoption of these concepts will start with you. I believe that thoughtful incorporation of multiple entries, multiple exits and open curricula into your programs will increase their flexibility to cater to the specific needs of professional learners.

In order to illustrate my arguments, I will refer to two programs that I am involved with, namely, the Master of Environment and Natural Resources Management (MENRM) Program and the Diploma in and Master of Land Valuation and Management (D/MLVM) Program. I was Program Chair of the MENRM from 2007 to 2010. In 2009-2010, my co-faculty members and I did a thorough revision of the MENRM Program. Currently, I serve as the Program Chair of the D/MLVM Program, a relatively new program that my colleagues and I proposed in 2008-2009.

## NARRATIVE

Let us start with multiple entries which we can think of in terms of a continuum (Figure 1). At one extreme, we have the case in which learners enter a program formally and follow a prescribed sequence of courses. This is the status quo for most of our programs in the UP Open University (UPOU). Thus, all learners begin with the same set of courses, which may have the characteristic course titles of “Introduction to ...”. Next along the continuum, we have learners who take non-degree courses without applying for admission into the program. Again, learners are only allowed to take introductory courses. If they have a positive experience with the first one or two courses (they may take a maximum of two courses with a non-degree status), they then apply for admission into the program, and the courses that they took as non-degree courses are then given credit. Because the introductory courses that they took are prerequisite courses, they will be allowed to take the next higher-level courses in the curriculum when they formally enter the program. So far there is nothing new here; this is not uncommon in the UPOU.

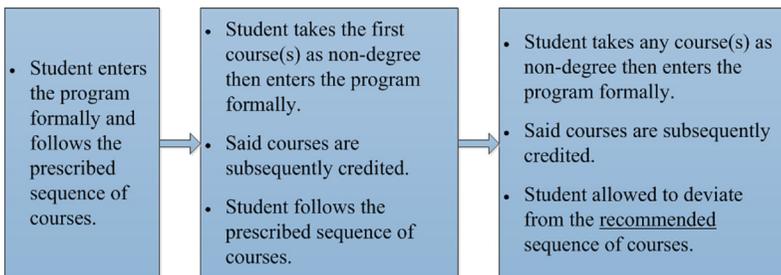


Figure 1. The multiple entry continuum.

My proposal is that we go further along this continuum—that is, we allow learners to begin a program by taking the higher-level courses first if they so wish. They may then take the lower-level courses later, to gain depth in their understanding of the higher-level courses. Thus, I am proposing that we relax prerequisites or do away with them altogether. We can retain our

present curricula with their recommended sequence of courses. However, the sequence of courses will not be prescribed but will serve as a mere recommendation – a guide for the uninitiated.

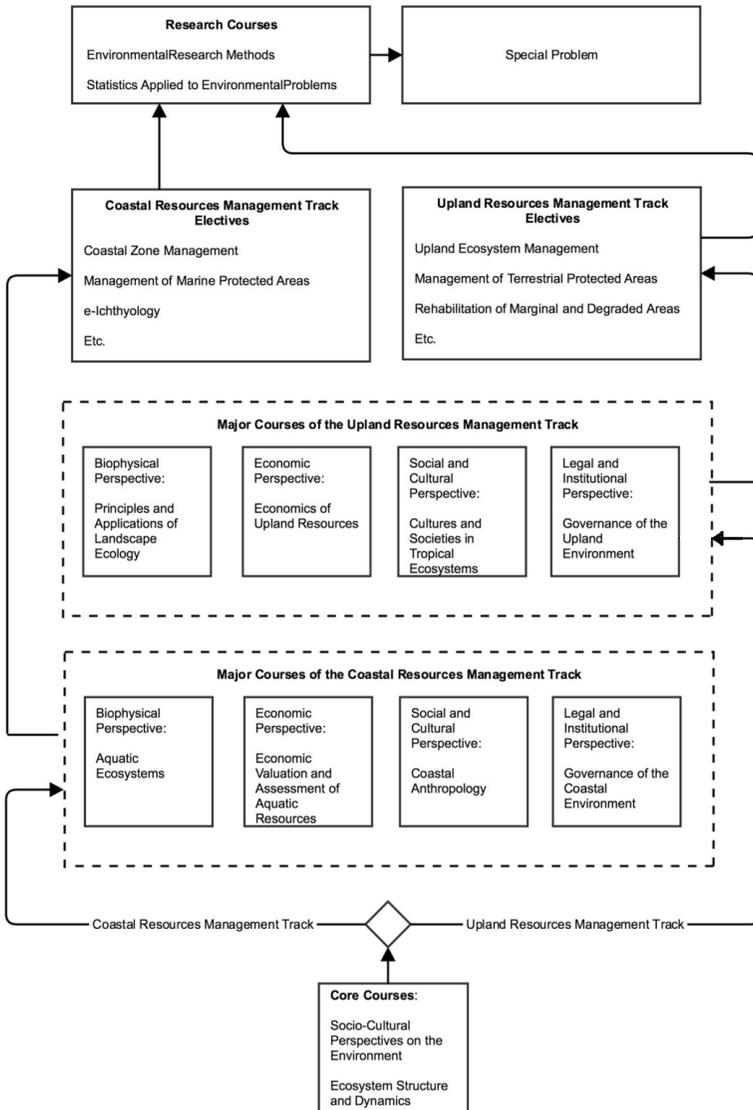


Figure 2. Structure of the MENRM Program.

Why would anyone want to begin with higher-level courses? This would be like watching a movie backwards, beginning at the ending. To see how this might be desirable for some learners, let us examine the MENRM Program (Figure 2). In this program, learners begin with two core courses, after which they are asked to choose between the Upland and the Coastal Management Track. The core courses provide the background for the major courses in either track. The major courses equip the learner with the biophysical, economic, anthropological and institutional perspectives of upland or coastal management. The idea is that, when learners study real-world environmental problems in the resource management courses, they will have the ability to draw from multiple perspectives and thus analyze issues holistically.

If we look at the resource management courses, we will note that some of these coincide with initiatives that are widely applied by government agencies and non-government organizations. Examples include courses such as coastal zone management and management of marine protected areas. There are ongoing projects or units in government agencies with such names. There is a demand for such courses from practitioners, who would want to study and apply these courses in their work immediately. They should be encouraged to do so within the MENRM Program. These courses should be marketed to entice practitioners to enter the program.

Beyond individual courses, the MENRM Program should consider marketing clusters of courses that center around a theme. A learner who completes a set of courses could be awarded a certificate. Examples are shown in Table 1. Thus, the Coastal Management Certificate Program could be aimed at people who are currently implementing or contemplating the execution of coastal resources management programs. Likewise, the Fisheries Management Program would cater to those managing fisheries, whether as projects or as continuing work in a government agency.

If we examine the D/MLVM Program (Figure 3), we will note similar possibilities of marketing higher-level individual courses. In Figure 3, the

Table 1. Certificate programs that could be proposed within the MENRM Program.

<b>Coastal Management Certificate Program</b>	
<i>Course Title</i>	<i>Description</i>
Aquatic Ecosystems	Physical, chemical, biological characteristics, and dynamics of aquatic ecosystems
Coastal Zone Management	Components, utilization and management of the coastal zone
Management of Marine Protected Areas	Processes and techniques in the management of marine protected areas
<b>Fisheries Management Certificate Program</b>	
<i>Course Title</i>	<i>Description</i>
e-Ichthyology	Biology of fishes
Aquatic Resources Management	Utilization, conservation and management of living aquatic resource systems with emphasis on fisheries management
Advanced Aquatic Resources Management	Fish population dynamics and stock assessment

boxes with solid lines show the program as it currently exists while the boxes with broken lines indicate courses that are being considered for proposal. At present, admitted students are asked to take the courses sequentially from the lowest numbered (LVM 201 – Concepts and Processes of Land Valuation) to the highest numbered (LVM 300 – Thesis). Yet there are higher-level courses that could encourage valuers to explore the program. If marketed to practitioners, the Advanced Valuation course would attract many because of its focus on the income approach, which is the least understood among the three major approaches in real property valuation. Similarly, not many valuers can competently appraise agricultural properties since this requires considerable understanding of

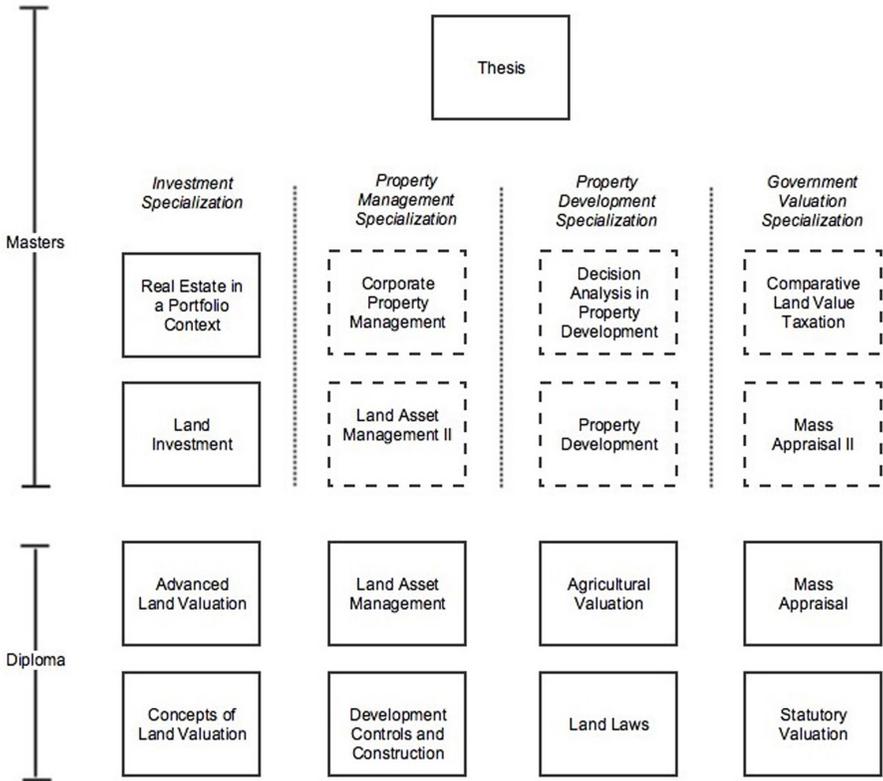


Figure 3. Structure of the D/MLVM Program.

agricultural productivity. Thus, the Agricultural Valuation course could be the entry point for practitioners who have a need to learn how to value agricultural property. The D/MLVM can also market clusters of courses. One cluster, which could be called the Real Estate Investment Program, could consist of three courses listed in Table 2. Figure 3 indicates other courses that are being considered for development, which are indicated by boxes with broken lines. If these courses are added to the D/MLVM Program, the program will span the major subfields within the field of real property studies. Arguably, the major subfields of real property studies are: (i) real estate investment, (ii) real property management, (iii) real property development, and (iv) government valuation. Thus, in its present form, the D/MLVM Program does not allow its learners to specialize in a

subfield other than real estate investment. Development of the additional courses in Figure 3 would give learners the option to specialize in three other subfields. In addition, three other certificate programs could be offered, which are listed in Table 3.

Table 2. A possible Real Estate Investment Certificate Program within the D/MLVM Program.

<b>Course Title</b>	<b>Description</b>
Advanced Valuation	Principles of valuation of complex properties and concepts of property value, market analysis, valuation of investment properties, development properties, specialized properties, and non-market based properties
Land Investment	Introduction to the land investment process
Real Estate in a Portfolio Context	Analysis, development and management of real estate portfolios

Table 3. Other certificate programs that could be offered if additional courses are developed

<b>Certificate Program</b>	<b>Constituent Courses</b>
Real Property Management	Land Asset Management Land Asset Management II Corporate Property Management
Real Property Development	Development Controls and Construction Property Development Decision Analysis in Property Development
Government Valuation	Mass Appraisal Mass Appraisal II Comparative Land Value Taxation

Having multiple entries requires that we relax — or completely do away with — prerequisites. We need to re-examine the idea of prerequisites. Because of our experience, those of us who were science majors as undergraduates tend not to question prerequisites, especially with regard to mathematics and the physical sciences. One needs to study algebra before calculus, and general chemistry before analytical chemistry or organic chemistry. The calculus series makes perfect sense; it is unimaginable that someone could take it out of sequence and survive. Analogous situations in the social sciences and the languages probably exist. One must go through English I before studying creative writing, I presume.

Yet it is my observation that we tend to go overboard with prerequisites and to apply them mechanically with little thought on whether they are truly warranted. We can see this even in the biological sciences. Take the example of ecology. Its typical prerequisites are general botany and/or zoology, and additionally, in some cases, courses in taxonomy. Yet, we must ask, without those prerequisites, will a learner be incapable of understanding ecosystem principles? In the MENRM Program, the answer to this question is apparently “no.” Ecology is a first course in the MENRM Program, which admits students with baccalaureate degrees in any field. Thus, we must insist on a prerequisite only when a higher-level course cannot be understood without a background on the latter. Such is the case, for example, with the calculus series where one should first study single-variable calculus before taking on multi-variable calculus. But if a course is merely advantageous but not absolutely necessary as a background to another course, then we should recommend—but not require—that the background course be taken before the higher-level course. We need to distinguish between the “required” and the “nice-to-have.” We have to be particularly aware of this in graduate programs, where our students are adult learners.

More than relaxing prerequisites, I would like us to consider the fundamental way in which we approach learning. Figure 4 depicts what I regard as conventional learning and its alternative. Conventional learning

is what all of us have been exposed to. We study background or basic courses, and then eventually we integrate what we learned to examine something more complex. Essentially, we move from basic to complex. Yet I submit to you that the reverse path is just valid: we can learn by beginning with the complex and then moving to the more basic.

I first heard about this alternative way of learning in the nineties when I had a conversation with the Head of the School of Environmental Engineering at Griffith University in Australia. He said that his school ought to experiment with the alternative approach by, for example, having their students begin by studying a coastal area with all its complexities. This would give them a context within which to look at specific phenomena in the coastal area, such as the chemistry of its waters and the forces governing waves and currents. Thus, courses in water chemistry and physical oceanography would come later, but these would be studied within a context. The context would make concepts more accessible and relatable. Such would be the advantage of this approach.

In this presentation, however, my purpose is not to argue for a wholesale adoption of the alternative approach in Figure 4. Rather, I brought up the idea to prime your minds for what I regard as an extreme proposal. So far we have considered attracting students by allowing them to enrol in higher-level courses or in certificate programs consisting of higher-level courses. Now I would like us to consider an extreme point in our multiple entry continuums, which is allowing a student to begin a program by working on his or her thesis. I purposely omitted this extreme point in Figure 1 to avoid its premature rejection, but it should be the rightmost point. As we all know, the thesis course is normally considered the capstone course of a program. Why would anyone want to start a program with a thesis? Does such a person exist?

A student might want to start working on a thesis immediately because of a presently existing (i.e., not permanent) opportunity to collect data or temporary access to data. In environmental projects that I have been

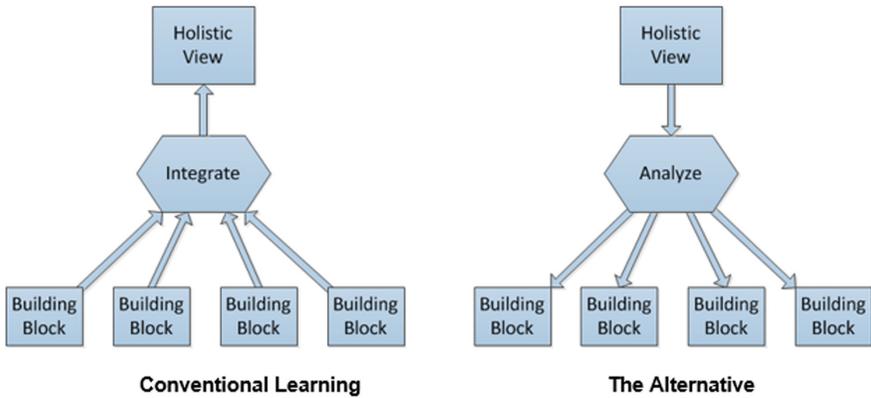


Figure 4. Conventional learning versus the alternative.

involved with, when we have staff that are concurrently enrolled in a graduate program, we encourage the staff to see if parts of the research project can be incorporated into the staff's thesis. This is because someone who is working on a thesis will collect data carefully. It does not take much to motivate a staff member who sees the research project as his or her thesis. There are many research project leaders who are aware of this and are inclined to hire thesis students because of their self-motivation. Thus, graduate students may want to work on their thesis immediately if their work presents them with an opportunity to collect or use data for their thesis.

In the D/MLVM Program, the person who developed the courses on real estate investment has no graduate degree but possesses something that is perhaps more valuable – 26 years of experience in valuation and analysis of investments in real estate. I imagine that if she were to enrol in the D/MLVM Program, she could begin with her thesis immediately, perhaps on best practices in analyzing real estate investments.

You might ask, why would anyone with 26 years of experience in valuation want to enrol in the D/MLVM Program? Assuming that such a person is enticed by the opportunity to contribute to the body of knowledge through

his or her thesis, what could this person gain by enrolling in the rest of the courses in the program? My answer is that, because the D/MLVM Program's breadth of scope and depth of treatment of topics, this person will encounter many things that will be new to him or her, despite many years in the school of hard knocks. My colleague, whom I gave as an example, has become specialized in certain techniques or particular aspects of the discipline as she has progressed through her career. Thus, she knows some things extremely well — indeed, she is an expert in them — but she has a rather vague knowledge of the other areas in the field. And I dare say that even in her area of expertise, she could still learn from us if she enrolls in our program. As teachers of professionals, we see this happening all the time. Our students practice professionally what we teach, and yet when they encounter our courseware, they always learn something new. This is because our courseware is a distillation of many readings that we carefully evaluate, including concepts and practices from other countries. So no matter how much experience a person has, he or she can still learn from a structured course. Such is the power of formal education. The example I gave in real estate valuation is that of one person. Yet in the realm of real estate valuation in the Philippines, this person's situation is not unique. The advent of formal education programs on real estate valuation in our country is a recent phenomenon, being an offshoot of the Real Estate Services Act of 2009. Thus, most appraisers are self-taught and have acquired their knowledge and skills on the job. I believe that among our corps of veteran appraisers, there are those who can begin their studies with their thesis.

The foregoing are my thoughts on multiple entry. With regards to multiple exits, there is not much to say. At present, the MENRM and the D/MLVM Programs are ladderized programs in which students have the option to exit with a Diploma or to continue beyond the Diploma and aim for the Master's degree. There will be more exits if my proposals to develop certificate programs are adopted. Thus, students will have the choice to exit the program upon earning a certificate.

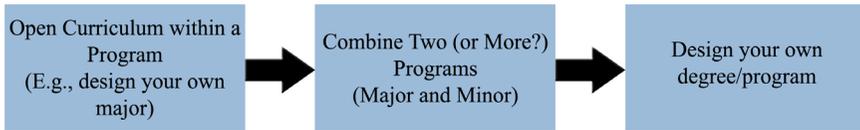


Figure 5. The open curriculum continuum.

With regard to the concept of open curriculum, I think of this again as a continuum, which I show in Figure 5. Thus, in the least open point along the continuum, we would allow a student to design a major or an area of concentration by a judicious selection of electives. Thus, this can be applied to a program with many electives such as the MENRM. Presently, openness via the freedom to choose electives is a feature of the MENRM Program within limits. One limitation is that the student is required to choose electives within his or her chosen track, which is either coastal or upland. Thus, those in the coastal track may not take electives from the upland track, and vice-versa. Yet there are a number of “ridge-to-reef” initiatives in the Philippines and abroad, in which environmental problems are traced from the uppermost extent of the watershed and followed down to the reefs in the coastal areas. In other words, there are good reasons to study the upland and coastal environments simultaneously since these two are interconnected. Thus, one small but not insignificant step that the MENRM Program could take is to do away with this restriction on electives. Of course, there should be guidance in the choice of electives as some loss in the benefits of specialization and coherence can be incurred if electives are chosen haphazardly.

In the next box along the continuum, which is the middle box in Figure 5, we would consider allowing the student to have a minor in another program. In other words, a student may take a set of related courses in another program, where such courses would constitute a minor. We can imagine, for example, a graduate of the Master of Public Management Program with a minor in Land Valuation or Environment and Natural

Resources Management. Other combinations of majors and minors are possible. In Figure 5, I placed a question mark after the words “or more” because I doubt that it is practical to combine more than two programs or to have more than one minor. Of course, I could be wrong.

Finally, under a full-blown open curriculum scheme, we would allow a learner to choose from the array of courses offered by the University and design his or her own program. There could be a framework to guide the program design of the learner. In a search I conducted, I found that this option is available in Brown University and in the Sloan School of Management of the Massachusetts Institute of Technology. Is this a feature that we might have in the UPOU? In my opinion, I cannot see this being instituted in the UPOU in the short term. This scheme is so far from what we have right now in the UPOU that I do not think it would profit anyone to mull over this.

Those are my thoughts regarding multiple entry, multiple exits and open curriculum.

## CONVERSATION

**Jean Saludadez:** The open curriculum from my point of view is a good design, but I would like to know if you have encountered literature that describes students' perspectives on open curriculum. In our program, while we faculty members want to adopt certain aspects of open curriculum, with regard to our students, it is a different story. You might be surprised, but our students really want to be guided and to be told what to do. When you present them a list of courses to choose from, they ask for your guidance and all but ask you to make the choices for them. So my question to you is, have you encountered literature that looks at open curriculum from the perspective of students?

**Cesar Luna:** I have not encountered research specifically on open curriculum from the perspective of students—whether they view it as advantageous or disadvantageous. The closest thing that I have found is testimonies from students in brochures and promotional material from Brown University. These are short statements from students and graduates proclaiming how wonderful it was to be able to design one's own curriculum. So that is what I found in my search. But I would like to respond to something that you touched on, which is whether open curriculum is likely to be welcomed by our students. I think the culture of the institution is a key factor that will determine the acceptance of this concept. Brown University has been allowing their students to design their own curricula even before the 1900s, and so the concept of open curriculum is deeply entrenched in their culture. In our case, I am not sure if this concept will take off in the UPOU, where our students have to be told each semester what courses to take.

**Melinda Bandalaria:** We have a different experience at the Faculty of Information and Communication Studies (FICS). In our Master of Development Communications Program, we allow our students to take as electives courses from various programs in the university. Yes, I agree that there are students who need to be held by the hand, but our experience

with our students is that many are willing to explore on their own the various courses offered by the UPOU. In fact, we even have students who want to cross-enrol in other constituent units in the UP System. But the problem is that our policies are not that open with regard to crediting courses taken outside the UPOU, and so that is another matter that we should look into. Also, I like the idea of having electives in one area or electives that are related, so that the electives taken together will comprise a minor. In Development Communication, we observe some students who take one elective in management, another in environment, and still another in education. You get the picture—there is no focus and no overall theme or purpose. I believe at one time we contemplated offering a program with a full-blown open curriculum. Our mental picture at the time was that of students shopping for courses in a supermarket, picking courses from the shelves and placing them in a shopping cart, according to their preference. We thought that such a program could be called the Master of Interdisciplinary Studies. Now in a program like that where the goal is to broadly survey various disciplines, a truly unqualified, open curriculum would be appropriate. But if we are considering our existing programs and how we might relax restrictions on what courses to take, I think I would regard my views as traditional in the sense that I would suggest that we tread carefully. We should be careful that we do not produce students who will not have a deep grasp of the discipline for which we will confer upon them a degree.

**Inocencio Buot, Jr.:** I actually think that the FICS is more liberal than the Faculty of Management of Development Studies (FMDS) in terms of allowing their students to take electives outside of their faculty. In the case of the FMDS, the electives in our programs consist of courses offered only by the programs of the FMDS. In fact, in the MENRM Program, the electives allowed are courses within the MENRM Program. Perhaps we can learn from FICS and allow our students to take courses from the full array of courses offered by the university. This would allow our students to have a broader perspective. We will look into this. We will be discussing this in one of our meetings.

**Cesar Luna:** One thing that I observed about open curriculum programs in the internet is that they are always guided by objectives. There is always a framework or at least a distinct field within which a student may design his or her own curriculum. A student may not study just anything under the sun. And this is something we would expect, because a degree should have value, and value comes from a certain amount of specialization. We will always have this tension between specialization and aiming for a broad perspective. Even in the example of the MENRM Program that I gave in my presentation, in which I suggested that maybe we should allow those in the coastal track to take courses in the upland track, and vice-versa, I put that on the table so that it can be discussed. Also, I identified a specific instance where this would be warranted, which is when a student wishes to look into the ridge-to-reef concept. So, although it might have appeared that I was calling for the dissolution of the two tracks, I was merely presenting one side of the coin. But we should not forget that there are good reasons for having distinct coastal and upland tracks. Coastal managers and researchers on the coastal environment form a distinct community. We attend the same meetings and conferences; we interact in projects, and so on. Everyone seems to know everyone. The coastal subfield is truly distinct, in both content and participants. Acceptance as a member in this community requires a certain depth of knowledge, at least implicitly. Likewise, an analogous situation exists for the upland sub-field. So, we should be reminded that when we aim to broaden the learner's perspective, there are trade-offs. We will give up some benefits of specialization.

**Inocencio Buot, Jr.:** Maybe we can modify the way FICS is offering electives. Maybe there should be some restrictions in the electives that students may take. For example, if a student's minor is in development communication, then the student should take only development communication electives. If the minor is in management, then only management electives should be taken.

**Patricia Arinto:** This relates to Dr. Jean Saludadez's question about students' level of maturity. We're all pushing for freedom of choice, but can all learners make a real choice? I see that some of us are already thinking about the policies that need to be changed, but that might be putting the cart before the horse. Of course, if we all agree that this is something we should pursue, then we can change what needs to be changed. A new scheme would require new structures. I would like to know what those structures are, because it is easy to say that we want this kind of result but how do we make sure that it happens?

**Grace Alfonso:** Before we look into structures, perhaps we need to re-examine more fundamental questions, such as what is the main point of a master's degree? What is the main point of a doctoral degree? If we treat our graduate programs as a venue for creating new knowledge, then we are saying that our students and our faculty are really co-creators of text. Now starting one's program with the thesis does not necessarily mean completing the entire thesis before moving on with the rest of the program, does it?

**Patricia Arinto:** One just needs to start with a research topic and it will guide the choice of courses.

**Grace Alfonso:** Exactly. We can have another path in which—imagine this—you already know what research you want to do, and you declare what your thesis will be. So you will then configure your studies to support your research. The idea there is to have a learning process that is equivalent to the way we really learn things in a non-formal way. When something piques our interest, we google it and we read about it and stuff related to it, don't we? We start with a question and then obtain information—and perhaps even skills—to answer our question. So this would be like merging the way we really learn and the way we come out with new knowledge. We will provide a venue in which your learning can be guided and where you can have a thicker discourse because you are part of a community. And in this way your thesis can increase in substance and depth. So I think this is

doable, although this will require work on policies. But this is a way to help ensure that your thesis is your contribution to your discipline. And this is really what we want our master's and doctoral students to do—to add to the academic text and add to the expertise.

**Ricardo Bagarinao:** I think these are good ideas, especially the idea of beginning with a thesis. But I would like to add that we have a diversity of students. There are students who could really start the thesis at the beginning of the program, but there are some who cannot. So, if we make declaring a thesis topic a requirement for admission, there are students who will be left out because they cannot comply with this requirement. I believe we should also appreciate certain benefits of conventional learning. Some students, need to take courses first and as they do, they learn about what interests them and what area they should do their research on. So what I would like to propose is, maybe we can give our students different options. For those who can start on their thesis at the beginning of the program, we will allow them to do that. On the other hand, for those who need inputs to have an idea of what research they should do, we will let them take courses first.

**Grace Alfonso:** I think that it is important to have courses on how to do research or how to make a thesis at the beginning of a program, for those who will start working on their thesis at the start of their program.

## **POSTSCRIPT AND REFLECTION**

Among the ideas in the presentation, two items elicited the most reaction from the participants in the conversation. First, there was the latitude to be given to students when they choose electives. This was ostensibly discussed as a particular feature of open curriculum, but we note that the essence of open curriculum — the idea that a learner would design his or her own curriculum, with all the attendant problems and advantages — was largely ignored. People talked about freedom to choose electives as practiced in their existing programs, with no one considering how a learner might completely reconfigure any one of these programs to suit the learner's needs. Thus, this became an occasion to discuss the range from which a student may be allowed to select electives. There seemed to be a consensus that some restriction on the variety of electives is desirable so that the electives taken by a student would together comprise a minor. The second item that spurred the most discussion was the idea of starting on one's thesis at the beginning of the program. Regarding this idea, Dr. Bagarinao seemed to have synthesized the recommendations. He suggested that students be given the choice to follow the thesis-first scheme or the conventional curriculum. I fully agree with his recommendation, and I believe that the UPOU in particular has the flexibility to offer its students this choice.

I am somewhat surprised that the idea of marketing clusters of courses was ignored. In the coastal subfield of environment and natural resources management, I can recognize distinct groups of practitioners. There are those who regard themselves as coastal resources managers, who tend to think in terms of stocks. Distinct from them are the fisheries managers, who tend to think in terms of flows. These two groups investigate different aspects of the same environment, using different tools and coming up with different recommendations. They also tend to work in different agencies. Likewise, in real estate valuation and management, the government assessors, who value properties en masse for taxation, are set apart from private valuers, who essentially value individual properties. Among private

valuers, there are many who routinely use commonly applied methods, and a much smaller group who are well-versed in the methods of finance and are inclined towards investment issues. And then there are the property managers, whose work hardly involves valuation, if at all. Perhaps the idea of clusters of courses did not resonate with my colleagues because they work in fields where the distinctions among practitioners are not as stark.

My last reflection concerns a minor point. It was minor during the conversation, but it is perhaps important to online students. I am referring to the exchange about students having to be told what courses to take. How often have we faculty members, especially the program chairs, wondered aloud why some students have to be told each semester what courses to take, despite their access to what we regard as a straightforward curriculum? Recently, I have come to realize that I have been looking at this situation the wrong way. Firstly, I realized that such students comprise the minority. More importantly, I used to compare these students who need help with myself, when I was an undergraduate. As an undergraduate, I never consulted a faculty adviser regarding what courses to enrol in. I did not even know that such a person existed. I perhaps read the curriculum once or twice, and that was enough to give myself direction. That is my recollection of my undergraduate self many decades ago. So as a program chair, I used to wonder why my graduate students could not be as self-directed as I was when I was an undergraduate. But then I realized that I had something my online students do not have. I was constantly in the company of friends who were in the same program. We always talked about the courses that we had taken, were taking and were going to take. It was a normal part of our conversations. In effect, we had our curriculum constantly in front of us. I realized that I did not possess an ability that my students do not share. I have since disabused myself of this unwarranted feeling of superiority.





## CHAPTER 6

A Sub-discourse on  
**An Exploration of Open Curriculum in the  
Context of Social Transformation**

Marie-Sol P. Hidalgo

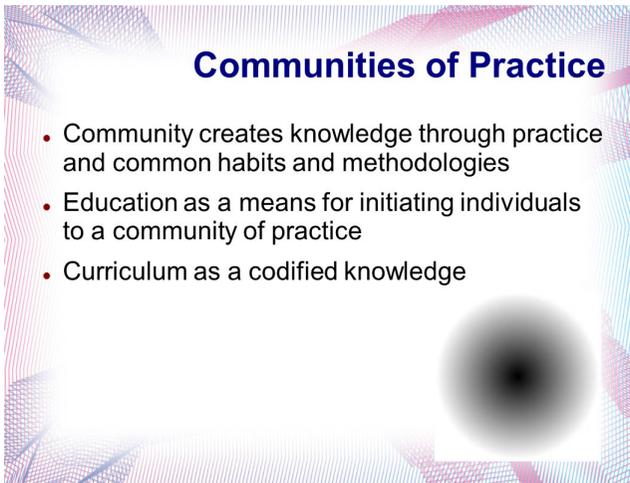
### **CONTEXT**

There is an ongoing discussion of how the UP Open University (UPOU) can strive for greater openness in its academic functions. One such function is in the design, institution, and implementation of curricula. In this paper, I will look into the kinds of open curricula currently in practice.

The context being explored is how UPOU can harness the values of Universitas, that is, of quality and openness, for social transformation. This is a puzzle in the sense that, academics, as communities of practice, tend to be both gatekeepers and thus, quite conservative, but at the same time, explorers and researchers, and thus mavericks. This paper looks into the idea of the curriculum as a codified form of knowledge for communities of practice. In what ways can openness be welcome in such communities of practice? I argue that the peripheries, and intersections of peripheries, are the places for such kinds of innovations.

## NARRATIVE

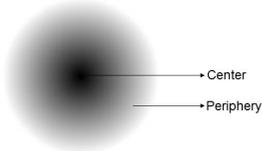
This paper is entitled *An Exploration of Open Curriculum in the Context of Social Transformation*. Let's start with the idea that a curriculum is actually a codified way of presenting knowledge and norms created by individuals in communities of practice. These communities of practice innovate new ways of doing and thinking, such as processes and technologies, for their convenience. They share a common knowledge on their unique expert perspectives. This is actually what the academe codifies into a curriculum, and so a curriculum is actually a way, a means of initiating individuals into communities of practice.



So maybe I can look a bit into communities of practice and explain or give light to certain questions that we have been thinking about. So if you look at the concept of initiating students into communities of practice, we can visualize the community of practice as a circle that has a center and a periphery. Maybe we can think of a student, as he or she is being trained and practices within the field: the student moves from the periphery towards the center. In the center we find the expert groups which really are very active in creating knowledge, and also very active in creating and initiating education within the communities.

## Communities of Practice

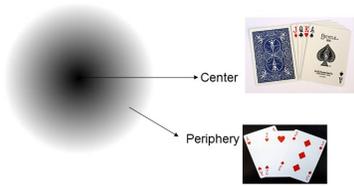
- What is quality?
- At what levels can a student enter and exit?



For example, in the Science community, communities of practice such as those that exist in the National Institutes of Health (NIH) grow within the Health Sciences. These are really well-placed and well-funded. They have the capacity to attract highly specialized people, and they come together to form the knowledge which is then codified into the curriculum which is then taught to the community. Meanwhile, in periphery zone you have people who just practice or apply whatever paradigm that center has created so going towards the periphery you can still have a lot of activity, but more of the application type, rather than the ones in the center, who are breaking the barriers of the current state of knowledge of the field.

## Communities of Practice

- The Solitaire Mysteries



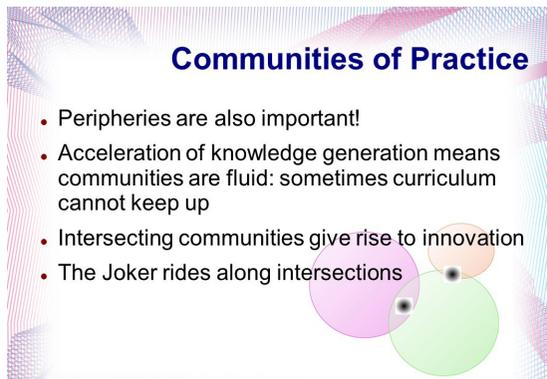
We can see that, we can liken it to a deck of cards wherein every individual has a certain “value”. We can think of the center as constituting the face cards -‘jack’, ‘queen’ ‘king’, and ‘ace’ - and the rest are those in the periphery. And as you go farther from the center towards the periphery, you are lessening in value. If we turn to academe, we have a student who enters with a low value and as he/she undergoes training, he/she is growing higher and higher in value so maybe we can also visualize here the idea of multiple entries and exits. Take a student who enters as a three and exits as a seven, or enters as a one then exits as a 9 or 10. Basically we can look at it this way: The student can enter different levels of the spectrum, and if it is flexible, then the student also has a choice at which point he/she exits the spectrum of the community.

I think that it is the center that actively creates new knowledge, but actually the peripheries are also important. How are the peripheries important? We have pictured a community of practice as a radiant sphere where the center is a center of creation and going outwards the activity is more of applications. But actually these communities of practice are very fluid, and as knowledge grows at higher and higher rates, the community also grows at faster and faster rates. They are like amoeba in that they are always growing and reaching out to new avenues and reacting to new stimuli. If we see these communities as fluid groups, then the growth of new knowledge and new avenues will always outstrip the current state of the curriculum. Sometimes the curriculum is not just codified but rather crystallized, and therefore it would be very difficult to change its form and content. I think that if we are looking for openness we are looking at a curriculum that can move fluidly, in a manner of speaking.

Now let us turn to look at peripheries for it is there where communities can intersect. The intersection of these communities can give rise to innovation. There is innovation in the center, but also in the peripheries, especially at the intersections between communities, even without the oversight of the people in the center. At the center, there are already high degrees of specialization, which can be an asset and a constricting factor. At the

intersections, one may have the privilege of being prospective because you are able to see that you can create new knowledge, you can create and actually start a new community of practice in these intersections. We can train people towards specialization to come closer to the center of knowledge of the field. On the other hand, we can train them to become 'jokers'. These 'jokers' can take any role, or any part. And then we can imagine the 'joker' riding along these intersections.

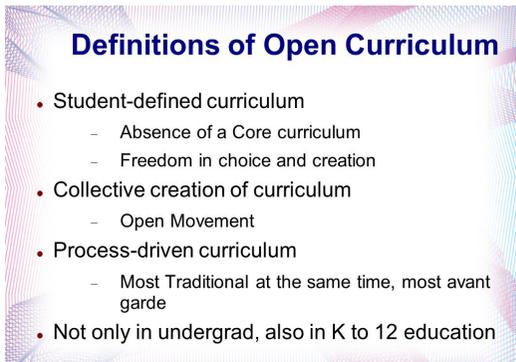
There are also ideas in educational philosophy that could relate to open curriculum development. From what I see it appears to me that the main questions of educational philosophies are: "what knowledge is valuable to be passed on to the next generation?", "who dictates this knowledge?", "what is the perception of teaching and learning process?", and "how do we know if we have succeeded?" or "what are the measures of our success?". If you look at it this way you can see that a curriculum will follow a certain path. There is the conventional or conservative way and there's the progressive then there's the radical path. So the question here is how open are we really? Do we have to lay down a certain philosophy of education to be able to see a sense of openness that is more appropriate for us?



From what I'm seeing there are three definitions of an open curriculum and these definitions are really dependent on the institution that practices it. The move towards change in educational philosophy and educational thought is the driver of change towards openness in the curriculum.

So here are the three definitions of an open curriculum: the first is the student defines the curriculum; the second is a collective creation of a curriculum or an open movement, and the third is a process-driven curriculum.

The first type of open curriculum is one that is open in terms of content and structure. This kind of curriculum is in use of some Liberal Arts colleges in the US. This curriculum is “open” because of the absence of a “core”

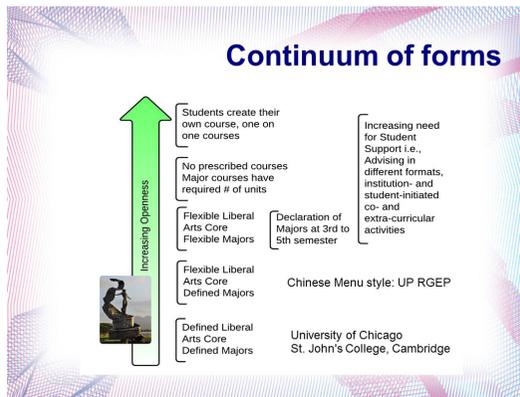


curriculum or a number of courses required for the student to graduate. If we look at this type of openness, we can say that this type of curriculum relies on the capability of the student to direct his/her own learning. This kind of curriculum is based on an educational philosophy that allows the student the freedom to define his/her own curriculum, and regard the faculty as “teachers of students rather than experts in a specialized body of knowledge” (Alpert, 1980).

In a Teagle Foundation study involving eight such colleges using the grounded-theory methodology to look into the commonalities of the colleges using this kind of curriculum, it was found that the main shared elements were not the curricula nor the institutional mechanisms, rather the strongest similarities were in terms of the underlying values and assumptions about education that these colleges hold. The Teagle study thus defined open curricula as ultimately being “a culture of student choice bounded by advising”, less bound by structure and more bound by

particular educational philosophies. (Teagle Foundation, 2006).

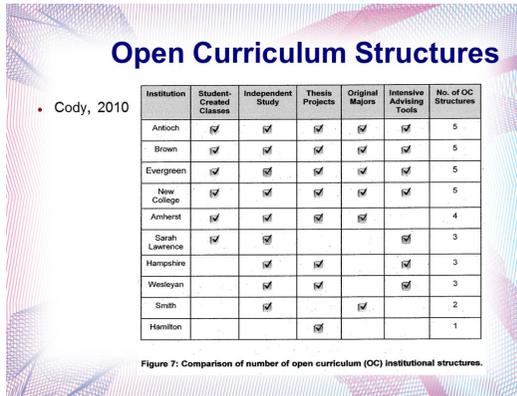
From this kind of very open curriculum, we can look at other less open and more structured curricula, which still leave the student with a moderate amount of choice. In this figure, we see that there are a number of forms from the less open to the most open; in fact, we can look at them as a continuum of forms.



Here we can situate our own practice with our Associate in Arts (AA) program, our Revitalized General Education Program (RGEP) for undergraduate programs in the less open part of the continuum. Our undergrad major courses are defined, even the manner of what to study and when to study, and the outputs of the courses are prescribed. We can also look into the International Baccalaureate curriculum wherein the students have a choice of courses, but these courses are graded into levels, and there is a limit to the choice of the students. In these kinds of open curricula, we have a sort of “distribution requirement”, wherein courses are not prescribed but the distribution of kinds of courses is prescribed. Some have likened this to a Chinese Menu, where you get a choice of one dumpling, one noodle, one soup, one meat viand, and so on.

In a recent study by Cody (2010), we find that there are different structures and timelines for choice in colleges which have open curricula. If we align

our undergraduate courses there, then what we have are only two open curricula structures, namely the thesis/special problems course, and student advising.



Student-designed curricula upwards on the more open scale have interesting features. Some colleges allow a student to design his/her own tracks for which the student has to apply to the appropriate office within a given amount of time (i.e., some schools require majors by the 3rd semester, others by the 3rd year). In some colleges, a student can choose when to enrol which course. They also have a choice on what kind of grades they want to get (marks or pass/fail), giving them the option to fail or not. They also have the choice to create their own courses and dictate their own assessments.

**Some notes...**

- Some have SD tracks which are by application
  - Student is expected to substitute more specialized courses for regular courses
  - Individualized learning plans through advising
- Choice between Pass/Fail or Marks
  - "Freedom to fail"
- Student-created courses (extend freedom to choose to freedom to create)

*If we consider this kind of curriculum with the first few slides on communities of practice, then we can say that this kind of curriculum allows students to choose their own specializations: find their own intersections of communities, and thus to act as “jokers.”*

The next kind of openness is in terms of open creation of the curriculum. This kind of curriculum is influenced by the open movement, alongside open educational resources (OER) and open courseware and open source communities. This kind of curriculum is created by teams of volunteers who write curricula. In other words, these volunteers do not have to be part of the academia in order to have a say in the curriculum. Practitioners who have a lot of expertise in the field but do not have, say, research credentials like academics, can be part of curriculum development. Stakeholders can easily take this issue up because it is important to society or the environment, and their voices can be part of the curriculum development process. So this kind of crowd-sourced curriculum has the strength of having many voices, much representation, and much involvement.

## Open creation of Curriculum

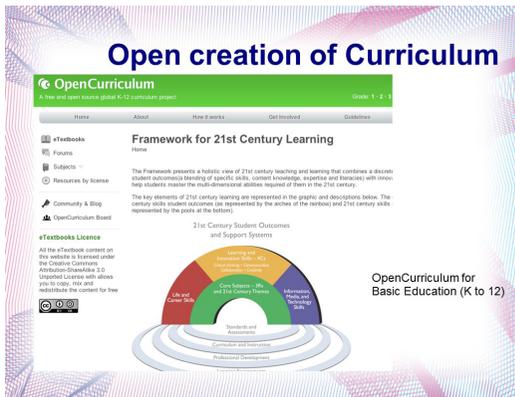
<p><b>Open curriculum</b> 114</p> <p><b>Active</b></p> <ul style="list-style-type: none"> <li>Process for selecting 2nd installment of prototype courses</li> <li>List of nominations for 2nd installment of prototype courses</li> </ul> <p><b>Completed</b></p> <ul style="list-style-type: none"> <li>Activities for selecting 2012 prototype: Brainstorm on criteria for course contributions   Process for selecting initial courses for 2012 prototype   Review criteria for selection of 2012 prototype   List of nominations for 2012 prototype   Rough consensus poll for 2012 prototype   Proposed decision for 2012 Prototype</li> </ul>	<p><b>Open credential services</b></p> <p><b>Active</b></p> <ul style="list-style-type: none"> <li>Brainstorm of summative assessment issues</li> </ul> <p><b>Open community service</b></p> <p><b>Active</b></p> <p><b>Open business models</b></p> <p><b>Active</b></p> <ul style="list-style-type: none"> <li>OERU logo</li> <li>Project OERU herald 20-13</li> </ul>
<p><b>Open design and development</b> 114</p> <p><b>Active</b></p> <ul style="list-style-type: none"> <li>OERU 2012 Prototype development node</li> <li>Developing an OERU course style guide</li> <li>Review of representative sample of materials</li> </ul> <p><b>Completed</b></p> <ul style="list-style-type: none"> <li>Capacity development LearningCenters workshop</li> <li>Learning design Consultation   Planning courseware, standardization</li> <li>Review of course guide example</li> <li>Pilot: Nominations for sub-components of OERU course</li> </ul>	<p><b>Open ICT infrastructure</b></p> <p><b>Active</b></p> <ul style="list-style-type: none"> <li>OERU Privacy and Terms of Service Policy</li> <li>Inventory of LMSs and testing WE content integration</li> </ul>
<p><b>Open pedagogy</b> 114</p>	

OER University WikiEducation page

On the downside, many education experts say that curriculum development is driven by educational philosophy. And if there are too many voices, coming from different perspectives and philosophical viewpoints, different values and needs, it becomes very difficult to manage. If we go back to the previous slide on curriculum being the answer to the question of why

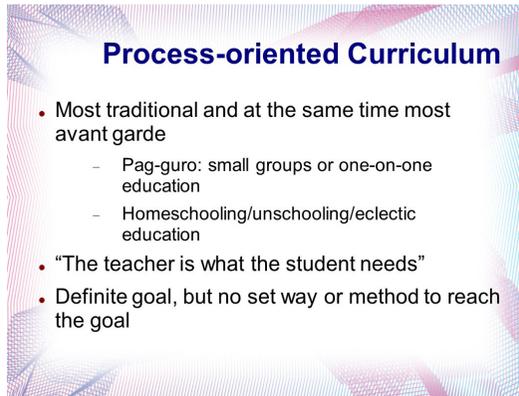
and for whom education is, then it can be very difficult to have all these volunteers in the same page. Nonetheless, there is a beauty in being part of this kind of curriculum development. One can engage as individuals or as institutions. They are at this stage of still figuring this out.

As an example, we have the OER University. This virtual university uses all open-source materials and is using sites like Drupal Open Curriculum, and Open Curriculum. Textbooks are created wiki-style or uploaded by writers as OERs. You can see from here that even design, pedagogy, assessments, and credentials are openly discussed as with Business Models. I wonder what the effect of this kind of transparency is for the universities, the students, and the faculty. The next figure is another example, this Open Curriculum which is for K-12 Education. Take note here that the organization highlights its holistic approach to education and the need for 21st century skills, 21st century assessments. In other words, it sees the openness as a means for the curriculum to catch up with the fast pace of change that the 21st century lifestyles and work environments are experiencing. However, there is still the core curriculum in the middle of everything. Some things are not really negotiable.



*When we look at this kind of curricula vis-à-vis the first few slides on communities of practice, we can say that these curricula are in effect the codification of an expanded community of practice, whereby not only the academics circumscribe the content and focus of the curriculum,*

but rather the community that includes industry practitioners, industry/education stakeholders, and parents, among others.

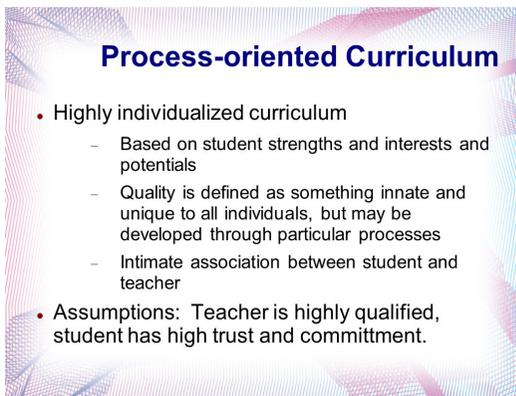


In this last kind of openness, we have the process-oriented curriculum. I used the term process-oriented because such a curriculum incorporates orally transmitted knowledge. For example, we have the traditional kinds such as apprenticeships in many practical trades, or pag-guro or mastery of self/spiritual knowledge undergone by the *Tausug murids*. This can also be the model of some types of home schooling families who subscribe to the unschooling or eclectic education. This kind of curriculum again is largely driven by philosophical considerations and are thus structured. In this kind of curriculum, there is no definite succession of content; rather, there is an intimate relationship between teacher and student, such that it is said that “the teacher is what the student needs.” There is no definite curriculum, but there are definite goals or outcomes for each stage or phase of teaching.

For the curriculum of *Pag-Tuhan*, the student’s goal is simple: self-knowledge. Knowledge of the instinctual self with its base needs and desires, graduating into knowledge of the blaming or accusing self, and finally knowledge of the peaceful self. Since the knowledge is inward rather than outward, the teacher needs to be a knowing master and the student an open book. The teacher offers learning opportunities and knowledge that is appropriate to the student, at this stage of his or her

development. The student, on the other hand, transfers from teacher to teacher, taking advantage of the best learning experiences and the most appropriate knowledge that each teacher can offer.

The curriculum takes into consideration the strengths and weaknesses of each student, the student's interests and potentials. Maximizing all available resources, including current conflicts or challenges, the teacher strategizes the learning process in such a way as to allow or push the student into experiencing situations that make learning, in the form of realizations, possible. The philosophical stance is that each student has an innate ability to succeed, and that each student constructs his/her own version of success. There is no one endpoint that says the student is successful or not. There is only experience, and the realization from it. Of course for this to happen, there needs to be implicit and high trust, respect, and regard for the teacher. And the student needs to have a high level of commitment. This is a very active type of learning. Because the curricula is very fluid and the learning and assessments are internal rather than external, the students and the learning environment do not have the benefit of benchmarking. There is no basis for comparison with others, even with the closest of classmates. However, there are very definite positive effects of learning. These effects are what pushes the learning forward.



**Process-oriented Curriculum**

- Highly individualized curriculum
  - Based on student strengths and interests and potentials
  - Quality is defined as something innate and unique to all individuals, but may be developed through particular processes
  - Intimate association between student and teacher
- Assumptions: Teacher is highly qualified, student has high trust and commitment.

*In terms of the earlier figures in communities of practice, we can look at this kind of open curriculum as either training for face cards (as in the example of Pag-tuhan) or training Jokers (in unschooling/eclectic schooling).*

I am reminded of the grand idea presented by our Chancellor: the *universitas ethos*, being one that values quality and openness towards social transformation. Openness is a philosophical stance that brings with it new ways of doing and knowing and valuing. However, there would necessarily be the attendant challenges to moving towards openness. It is said that “(t)rying to change a university is like trying to move a graveyard: you get very little internal support” (Taylor, USQ, 2001). Indeed, one of the functions of higher education is as gatekeepers to professions. Thus, there is a lot of boundary-keeping, a lot of turfing, and one of the ways this is done is through control of the curriculum.

In moving the university towards openness, I am reminded of Newton’s Laws of Motion. First is inertia, which, when applied to universities means that a university that is in motion will stay in motion, or a university that stays at rest will stay at rest, unless an external force acts upon it. I think the UPOU, as a university, has never really ceased moving with the times, and the open movement, as a force, is already in place. Next, we have the relationship between mass and acceleration. The larger the university, the harder it is to move, let alone to move with speed. We are glad that UPOU is not very big, thus it is easier for us to pick up a good pace. Last, we know that each action begets an equal and opposite reaction.

Would we, as an institution, become beset by backlash if we embark into opening our curriculum? I think that we have the benefit of sharing our university with the rest of the UP System by way of introducing affiliate faculty of different UP units to new ways of teaching and we have been doing this for quite some time. Backlash is more difficult if one solid force

meets a brick wall. But if one applies small amounts of force, then the barrier may, in fact, instead of a brick wall, become receptive to our ideals and ideas. Then our force may help break the inertia of other universities!

## CONVERSATION

**Jean Saludadez:** I think it's easier to move a graveyard, than to change a university. My question: Is there a particular discipline where the open curriculum is practiced in Brown University? Or does it apply to all disciplines in Brown University?

**Patricia Arinto:** The whole curriculum is really a Liberal Arts curriculum and it applies to that. To what extent can we apply any or all of the ideas that have been shared by Sol?

**Finaflor Taylan:** If there is a minimum curriculum under the standards that CHED is trying to develop, then this curriculum will be institutionalized and become static as this will be followed by all schools offering the program. Once institutionalized, doesn't an open curriculum become static, in the sense that its openness does not depend on the needs of the students?

**Author's response:** I think that's the usual practice - i.e., that universities determine the curriculum. But if you look at the second concept of the open curriculum, this refers to the openly created curriculum, in which different perspectives from volunteers, who are not usually a part of curriculum development, are considered. A crowd-sourced curriculum requires the active participation of these volunteers. My thinking is that universities are more successful when they see the value of that. Maybe they just need institutional mechanisms to go forward and to sustain it.

**Patricia Arinto:** You started by pointing out how curricula can come about – i.e. that a curriculum is developed by a community of practice (CoP). While that is supposed to be a liberating metaphor, it is at the same time difficult. A closer look at that concept shows why it is difficult to adopt a completely open curriculum – i.e. a curriculum is a community effort and communities draw boundaries. The reason you can say you're a community is because you have boundaries and there are outsiders to this community. I think that what really happens when you accept

students into the university is socialization, or learning to become part of the group. Applying the idea of the CoP in the university, you begin with legitimate peripheral participation, you are an apprentice, you are assigned to a master or a mentor. And then as you develop skills and you become more skilled, you are assigned more difficult activities. And then you finally become a full-fledged member of the CoP.

The presentation also underscores the importance of the relationship between the faculty and the student. The more open your curriculum, the more you really need student support. The more open you are, the the more flexible you have to be and the more you need to provide on demand individualized student support.

**Author's response:** Actually, if we want to do that, then we can institute the proper mechanisms for it.

**Patricia Arinto:** Amherst College, Brown University, and St John's can do it because they are conventional universities and they don't have massive enrolments. My question is, to what extent can an open university adopt open curricula?

**Author's response:** There are certain mechanisms that we cannot put into place right now but maybe in the future we can do so. An example, recognition of prior learning. We can develop a way of operationalizing that. I think we can also create mechanisms for flexible curriculums. It's really a matter of defining what we want out of the students, what we want out of the teaching process, and the more we define these, more easy it is for us to institutionalize it to provide support for that kind of outcome.

**Ricardo Bagarinao:** If we're going to pursue openness in this university, then I would like to pose this question: Is it the role of the university to respond to society's needs or is it a responsibility of the university to create the need?

**Author's response:** It is the role of the university to train people who can create knowledge. We don't need society to demand this knowledge creation. Research outputs are usually not immediate needs that have to serve society immediately. If the university relies solely on the demands of the community, then I don't think we can train people all the way to knowledge creation. So in a way the university has something to contribute because we have to produce professionals who will then articulate the needs of society. That is something we have to think about.

**Cesar Luna:** My example would be the thrust of fisheries management. I don't want to convince people that you need to be managing your resources and you need to understand that there's a process. And I don't need to find a donor, that will support my advocacy. You need to go beyond that, you need advanced mass appraisal that needs to be linked that to the idea of taxation. So rather than just responding to their needs, I want to tell students what they actually need through a prescribed curriculum.

**Aurora Lacaste:** In my opinion we should do both, like doing both offense and defence. That is, we react and at the same time we propose and create new knowledge. We should be responsive to the needs of the learners, and at the same time to teach them the things they should actually learn whether they directly acknowledge it as a need or not. The university is perpetually moving between the center and the periphery. We're in fact at the intersection, trying to achieve the proper response to the situation and being the force to clarify objectives for the people since we're the ones who have more knowledge of the breadth of the field.

**Cesar Luna:** The other thing I observed was when we talk about openness, we refer to Brown University. But we, can be more open than Brown University if we consider student diversity. Our students are from all over and they would have more to offer.

**Patricia Arinto:** We're really not a typical open university in terms of size. As a small university we can offer customized student support. If you want to talk about models of openness we should look at the Open University of the United Kingdom and other mega-universities. What is the difference? When you are truly open, you have to have flexibility. Now, how do you have flexibility? When we say that we need to have a strong faculty-learner relationship, that is only possible if the faculty is not burdened with other things. When you think about scaffolding, there are two kinds – the fixed scaffold and the adaptive scaffold. Your fixed scaffolds are your automated systems while your adaptive scaffolds are always human. For example, the student can get enrollment advice using the system but the student also wants to consult with and talk to somebody. Right now our systems are not automated to be really responsive. We are constrained because we don't have the supporting structure.

**Grace Alfonso:** How do we give student support? How do we give advising online? We also have to look at, openness in terms of exits and entrances, or providing access to more students. I think putting place the exits and entrances is easier to do. What can we do at this point? If we have 5000 students, what support are we going to give?

**Patricia Arinto:** That's a good question but how do you get to 5,000?

**Melinda Bandalaria:** Let's talk about our admission figures, and our registration, are we seeing that? Even if we open admission, we haven't reached that level.

**Grace Alfonso:** I'm just saying that there are ways which the university can do something like advertising to the market and being proactive in gathering all the valedictorians and salutatorians of all the high schools in the country and having them take the UgAT. We can really move faster towards it if we want it.

**Roel Cantada:** I think it would be a slight modification of the curriculum. Actually, if we want the students to participate, they could. But with the current procedures that we have, instituting a program takes several years. We could unbundle what makes up a course, because afterwards it's merely a way of organizing the learning experience of the student. We make an assessment of the learning objectives, and if you don't want the learning objectives we can list competencies. Competencies can be satisfied by mixing and matching whole courses, learning objects, or learning resources. The students can shop for competencies instead of courses. When a number of competencies are satisfied, the student gets credit. The open curriculum is flexible in the way students can modify completion of competencies.

**Joane Serrano:** After listening to the discussion, I would like to go back to the question: are we ready for it? I've been in UPOU for such a long time and the way I see it, there are varying degrees of openness in different courses. So I would like to agree with what has been said - that it all boils down to how open should we be, and what are the conditions to be open. For example, are we ready to have a more intensive collaboration between the student and the faculty? Given our current situation, now we have to face the reality that this is impossible. For example, I handle a course with 30 students and it is possible for me to be with them always. But can I do the same with hundreds of students? So we go back to the system. Are we automated enough? Are we ready for the kind of openness that we really want?

**Alvie Alip:** When will we do this? When will we be ready? Going back to UPOU's mandate of widening access to quality education, our task is not just to widen but also to offer quality education. So I think that's a guiding principle that we can apply whether or not we open our curriculum.

**Patricia Arinto:** What I'm getting is that we're trying to arrive at one solution — it's difficult to get out of that mode of finding one solution for the problem — but if we all agree that the problem is complex, then we have to look at multiple solutions. There are programs that are more open than others. The Chancellor's point is that we can do a little bit of experimentation. In our current setup, one of the things that we might think about is operationalizing flexibility on a per program basis, not unilaterally, because the programs will have different answers to these questions.

Another issue to look into is that all programs now have prerequisites. Openness is not cost-effective when you have to pay the faculty even if there's only one student enrolled. We need to marry the concept of openness with the concept of flexibility.

**Grace Alfonso:** I think we took student support in context so that's why I went into numbers. There seems to be a "healthy" number within the UP System in terms of money coming in but in terms of an operation that we can exercise, our mandate of wideing access and ensuring quality and excellence of academics for which UP is well-known.

## POSTSCRIPT AND REFLECTION

Almost five years after the presentation of this exploration of open curricula, the topic of discussion is as germane and as exciting as it was in 2012. As a university we have begun to experiment on open curricula. UPOU has undertaken several experiments in the aspect of increasing student choice or self-determination in terms of course activities and assessments. In our undergraduate programs, we have (as reported) the RGEP which allows for student choice bounded by distribution requirements. However, the new General Education (GE) program following the K-12 Basic Education curriculum seems more prescriptive because the GE requirement has decreased. Also, we have put together the National Service Training Program (NSTP) as a non-credit course for undergraduate students. The curriculum is open to the extent that the student has a choice on what community service activities they intend to participate in for the duration of two semesters. From the initial three tracks, there are now nine tracks for the students to choose from. Finally, we have been experimenting on student-determined assessments within courses; I have made, as a standard in my courses, the appropriation of 60 percent of the credit derived from faculty-designed “core requirements” plus 40 percent of the credit derived from student-designed submissions. Students have the choice of the form of the projects (roundtable discussions, term papers, project proposals, video presentations, memes, etc.) as well as the manner in which they wish to prepare the projects (individual, in twos, or in groups; with classmates or with other members of the greater community). Students are generally actively involved in preparation and presentation of their projects, but for the sake of comprehensiveness of the assessments, the faculty-designed requirements have been retained.

In terms of institutions which are already implementing an open curriculum, the nine Liberal Arts colleges in the Cody report are still strong in their implementation. Meanwhile, the OER University had, in 2013, redefined itself as the OERu, reflecting its nature – with partnerships ranging from universities and colleges to provincial and city education boards,

civic service organizations, grant foundations, and NGOs -- “invoking the broader definition of university as a community of scholars sharing information freely, rather than denoting the title of a formal teaching institution.” (OERu, 2013). It has formally adopted the use of MOOCs and Badged Courses in its curriculum, and in 2014 has had its first graduate, a student of the Thompson Rivers University.

Could the UPOU curriculum be more open? The way we design our curricula is still quite conservative. Although in effect the UPOU way of teaching is already implicitly dependent on trusting the student that he/she will read and study on his/her own, prepare requirements and take online exams with integrity. There is still the need for the faculty to maintain control in terms of quality, in the way that we want to ensure that students obtain the most appropriate and most comprehensive resources, and are given the benefit of quality assessments and feedback. Also, if we look at curricula being the result of the accepted notions of communities of practice, then we can say that there really are aspects of the discourse that are non-negotiable; they simply have to be part of the curriculum. Thus, the limits to openness are mostly felt in terms of our need to assure quality, to adequately socialize our students into their communities of practice, and if we can confidently address this while encouraging student self-determination, then we can move forward in terms of opening our curriculum.



## CHAPTER 7

### A Sub-discourse on Pedagogical Models in Open and Distance e-Learning

Patricia B. Arinto  
Roel P. Cantada

#### **DE Course Models**

Patricia B. Arinto

#### **CONTEXT**

Underpinning this presentation of pedagogical models of distance education, and in particular the focus on self-paced learning as a complement to collaborative learning, is the idea that UPOU as an open university needs to “develop a strategic plan relating to the relative importance to the institution of... different types of learners” (Collis & van der Wende, 2002, p. 66) and “profile itself around several instructional alternatives and develop pedagogical models” (p. 72) that are grounded in the principles of open learning and distance education.

The presentation was made to the UPOU community at the 4th roundtable discussion on openness held on 5 December 2012 at the UPOU Oblation Hall.

## **NARRATIVE**

This presentation provides an overview of two general pedagogical models for open and distance e-learning (ODEL) contexts, namely, the self-paced learning model and the cohort-based learning model. It is hoped that in the discussion we can collaboratively explore permutations of these two models that might be relevant to the UPOU context.

In the self-paced learning model, which is also known as the independent study model, courses are designed for independent learning. Learners may begin a course at any time during the year, proceed at their own pace, and complete assignments and exams at any time and often in any sequence (Anderson, Annand & Wark, 2005). The course materials are self-instructional and tutoring is individualized and based on the needs of each learner. According to Anderson et al. (2005, p. 223), this mode of course delivery has “dominated thinking and research in distance education for many years.” It is based on the concept of learner autonomy which is at the centre of several distance education (DE) theories, including Wedemeyer’s theory of independent study (Garrison, 2000), Moore’s theory of transactional distance (Amundsen, 1993), and Holmberg’s theory of guided didactic conversation (1983). Learner autonomy is indispensable in learning at a distance and DE practitioners have focused on how to design courses to foster independent learning. The self-paced learning model also makes distance education more flexible as it enables students to enroll at any time rather than at fixed points in the academic year.

The cohort-based learning model, on the other hand, is designed for group learning. In this model, which is more familiar to us because this is the model we are implementing at UPOU, the students begin and end a course at the same time, according to the academic calendar set by the institution. Collaborative learning is fostered through group discussions and other activities where learners interact with each other. This can mitigate the loneliness of studying at a distance and help improve learner

motivation and retention.

The self-paced learning model and the cohort-based learning model can be compared in terms of the three forms of interaction that impact on transactional distance. In Moore's (1993) theory of transactional distance, which is widely considered to be one of the foundational theories in the field of distance education (DE), he posits that the physical separation of teachers and learners in DE gives rise to a transactional distance, which is "a psychological and communications space to be crossed, a space of potential misunderstanding between the inputs of instructor and those of the learner" (p. 22). Three variables determine the extent of transactional distance: dialogue, structure, and learner autonomy. Dialogue, or the interaction between teachers and learners, reduces transactional distance. Structure refers to course design elements that determine the responsiveness of an educational program to learners' needs. The more structured a program, the fewer are the opportunities for dialogue between teacher and learner, which results in high transactional distance. In such situations, learners need to exercise a high degree of autonomy, which refers to the learner's ability to control and manage his/her learning in a self-reliant way. Moore (p. 24) states: "There appears to be a relationship between dialogue, structure and learner autonomy, for the greater the structure and the lower the dialogue in a program the more autonomy the learner has to exercise." Moore (1989) also identified three forms of interaction in the teaching-learning situation: learner-content interaction, learner-teacher interaction, and learner-learner interaction. Table 1 shows a comparison of self-paced learning and cohort-based learning in terms of these three forms of interaction.

As shown in Table 1, while in self-paced learning it is learner-content interaction that is the highest and learner-learner interaction is the lowest, in cohort-based learning it is learner-learner interaction that is the highest and learner-content interaction may be low especially where the course content is presented not only through self-instructional resources but also more directly by the teacher during class activities (for example, syntheses of class discussions). The latter means that learner-teacher interaction in cohort-based learning can be at a high level especially

Table 1. Comparison of the two models by degree of interaction

<b>Interactions</b>	<b>Self-paced learning model</b>	<b>Cohort-based model</b>
learner-content	high	low to medium
learner-teacher	low to medium	medium to high
learner-learner	low	high

syntheses of class discussions). The learner-teacher interaction in cohort-based learning can be at a high level especially when the teacher needs to facilitate group activities aside from providing feedback on student work. In contrast, in self-paced learning it is possible for learner-teacher interaction to be limited to teacher feedback on the student's assignments (for example, when the student has a high degree of independence and requires little guidance from the teacher or tutor).

The self-paced learning and cohort-based learning models can also be compared in terms of Garrison, Anderson & Archer's (2000) community of inquiry (CoI) model, which defines the educational experience in higher education as involving the building of a community from three elements: social presence, teaching presence, and cognitive presence. Social presence refers to "the ability of learners to project themselves socially and emotionally and be perceived as 'real people' in mediated communication" (Garrison & Arbaugh, 2007, p. 159). This sense of their online identity as members of a community of learners enables students to engage in the social construction of meaning, which is the focus of cognitive presence, defined as "the extent to which learners are able to construct and confirm meaning through sustained reflection and discourse" (Garrison & Arbaugh, p. 161). Cognitive presence is considered to be essential to the development of critical thinking, which is widely accepted as the goal of higher education (Anderson & Garrison, 2003; Garrison, Anderson & Archer, 2000). Teaching presence is "the design, facilitation, and direction of cognitive and social presences for the purposes of realizing meaningful and educationally worthwhile learning outcomes" (Garrison & Arbaugh, p. 163). Table 2 summarizes how the

three types of presence in a community of inquiry are established in the self-paced and cohort-based learning models.

Table 2. Comparison of the two models in terms of the Col model

	<b>Self-paced learning model</b>	<b>Cohort-based model</b>
Teaching presence	established through course materials	established by the FIC mainly
Cognitive presence	demonstrated through course requirements	
Social presence	possible through use of blogs and other social media application	established through group discussion and other collaborative activities

I propose that, following the principle of openness and flexibility, UPOU adopt the self-paced learning model alongside the cohort-based model. From the point of view of learners, implementing both models will allow us to cater to different learning styles. We have learners who have difficulty following the group pace, as well as learners who are very independent and who do not participate in the discussion forums but who produce excellent assignments and perform very well in the final exam. On the other hand, we have learners with limited independent learning skills and who need group-based learning. So by implementing both models UPOU can cater to these differences among learners. More generally, the increasing diversity of distance learners coupled with the availability of various technologies suggest that UPOU should support several well articulated ODeL models, including hybrid approaches that would allow for flexible learning that balances to some extent, or at least takes into account, the sometimes conflicting interests of accessibility, instructional quality, and cost-effectiveness (Daniel et al., 2009; Kanuka & Brooks, 2010; Power & Gould-Morven, 2011).

There are several requirements for the implementation of the self-paced learning model. One is a pool of tutors to provide individualized tutoring. Tutors must be clearly distinguished from the FIC. The tutor's role is to provide guidance and support throughout the course, while the role of the FIC is to design the course and evaluate student learning at the end of the course. Also required is a Personal Learning Environment (PLE) rather than a learner management system (LMS). The PLE is organized and managed by the learner rather than by the teacher, and while it does not preclude interaction among learners, this is done through learner-driven networking as in the case of social networking sites like Facebook.

Implementing self-paced learning alongside a cohort-based learning model is in keeping with Anderson's (2008) model of online learning (Figure 1, below) which shows two approaches – collaborative learning in a community of inquiry, and independent learning. The collaborative approach uses synchronous and asynchronous modes of communication to enable dialogue, collaboration, and the social construction of meaning. The independent learning approach makes use of tools that enable learners to interact with, explore, and develop a deep understanding of content. The elements of content, teacher, and learner are present in both approaches. But as previously noted, the interactions among these elements that are foregrounded differ, with learner-learner interaction being more prominent in the collaborative learning approach and learner-content interaction being more dominant in the independent learning approach. Also, teacher-learner interaction appears to be more direct in the collaborative learning approach (i.e., teacher and learner are shown to interact directly in the community of inquiry), whereas it is mediated by content in the independent learning approach (i.e., the teacher provides structured learning resources that the student studies on his/her own). Learner-content interaction is also present in the collaborative learning approach in that the focus of the dialogue is the course content. Similarly, there is the possibility of learner-learner interaction in the independent learning approach through the learner's interaction with family members, colleagues in the workplace, and peers, including fellow learners in online

networks. According to Anderson (2008), teachers and course designers using his model of online learning need to decide which approach to take based on the nature of the learning that is prescribed by the curriculum, among others.

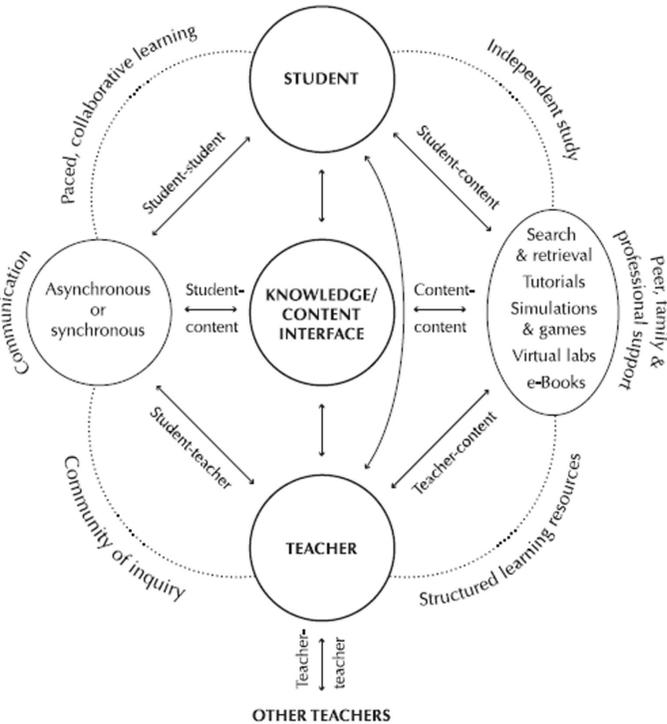


Figure 1. Anderson’s model of online learning  
 (Source: Anderson, 2008, p. 61)

The self-paced learning model is being implemented in some well-known open universities such as the Open University of the United Kingdom and Athabasca University. In the latter, all courses are offered in self-paced learning mode and only some courses are offered in the cohort-based learning mode. In the case of UPOU, we can decide which courses can be implemented using the self-paced learning mode, and how best to implement it.

## **MOOC Models**

Roel P. Cantada

### **CONTEXT**

Four years after the first MOOC (CCK08), when this narrative was delivered, the discussion of massive open online courses by educators around the world was reaching its peak. But the academic chatter in conferences and media was about a type of MOOC whose design is nothing like the original. The issues that concerned those who talk about these MOOCs centered on business models, sustainability, and monetization. Side-lined were the issues that centered on educational philosophy, pedagogy, and learner agency that dominated the first MOOC. What was supposed to be a model for realizing a philosophy of education had been co-opted by business-minded leaders in education as a vehicle for injecting new life to waning or failed projects that attempted to expand their operations online.

The media and some academics would ignore all MOOCs that preceded CS221: Introduction to Artificial Intelligence (2011). The massiveness of student registration in CS221 certainly dwarfed CCK08, but its network of nodes would be puny when overlaid on the network of the original CCK08 that stretches out over the Internet unbounded by a single software platform. For the expositor of this narrative, who was a participant of CCK08 and CS221, calling CS221 as the first MOOC was grating to the ear, so much so that it would spur him to “educate” the educated in the differentiation of different MOOCs and its brief history. To him there appeared to be a need to remind people of the original MOOC in order to warn them of the possible frustration and depression over the xMOOC bandwagon after a brief euphoria over its supposed promises of cure for all the ills of higher education. This is something that the original MOOC did not promise. At the time of this writing, depression is setting in as the xMOOC party begins to wind down, former advocates recant their prophecies, and financial donations for the project dry up.

This narrative was delivered to the UP Open University (UPOU) community in the 4th roundtable discussion on openness at the UPOU Oblation Hall on 5 December 2012. It is a small attempt to remind the community of the different designs of MOOCs and to the possibilities of its underlying and deeper principles for open and distance education. It has been edited for print and updated with more current information.

## NARRATIVE

I'll be talking about three models of Massive Open Online Courses (MOOC). The names of these MOOC models are new terms that have circulated around in the blogosphere. They are not terms that can be found in scholarly papers or agreed upon by MOOC researchers. These models are the cMOOC, the xMOOC, and the Mechanical MOOC (hereinafter mMOOC). The last is a new model proposed by a group of open e-learning providers namely Peer 2 Peer University, MIT OpenCourseWare, OpenStudy and Codecademy. The cMOOC is a connectivist massive open online course that is a networked learning environment that loosely connects any instructional material, educational software and person as nodes and agents of knowledge. The formation of learning paths and ego networks is self-driven by learners but curatorship by community experts is valued.

The technology focus of cMOOCs is on aggregators like gRSShopper. gRSShopper was created by Stephen Downes. Figure 1 shows a concept map of technologies used in the first MOOC in 2008 entitled *Connectivism and Connective Knowledge* course (CCK-08)(see also Downes, 2008). Offered by the University of Manitoba, you will find the OLDaily website that displays the harvested result of gRSShopper, the CCK-08 blog site, MOODLE LMS, Pageflake, and Second Life just to name a few. When you enrol in a cMOOC, like the *Openness in Education (oped12)* course offered by the Athabasca University and facilitated by George Siemens and Rory McGreal in 2012, you'll get an email of a newsletter generated by gRSShopper. Participants who want their published blogs, tweets, webpage or any online material included in the newsletter will tag their content with #opened12. What this aggregator does is to search the World Wide Web for the tag #opened12, and when it finds that tag the aggregator adds the link to the material in the newsletter. Then it automatically creates an email and sends it to all participants so that the participants know where to look for the new content contributed by other participants.

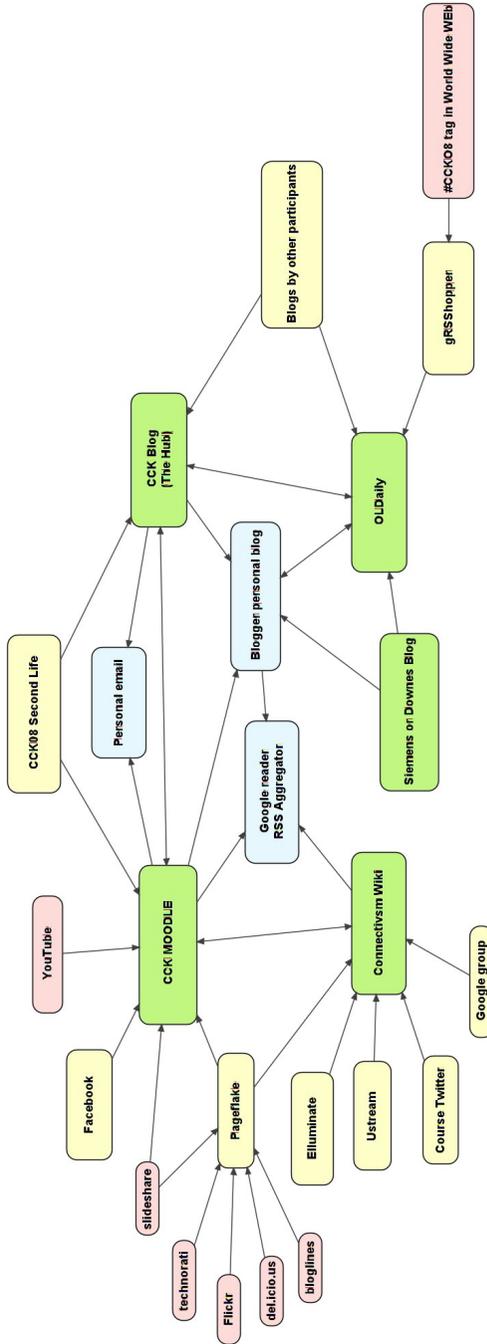


Figure 1. Technologies in my CCK-08 PLE

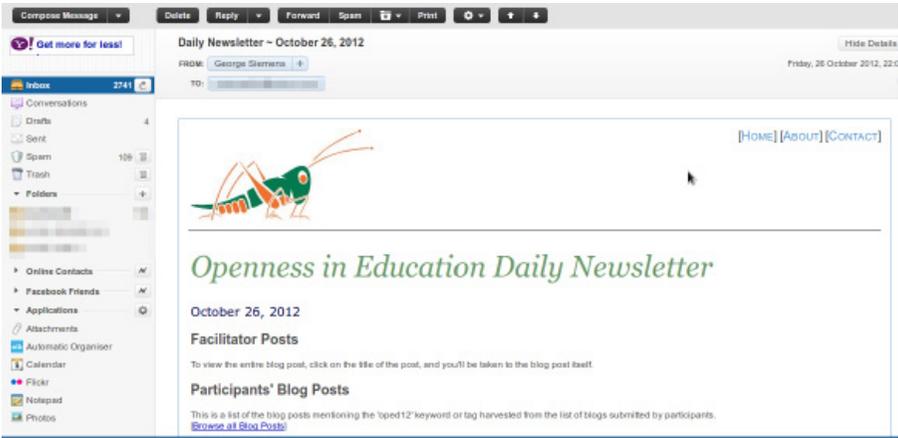


Figure 2. gRSShopper generated newsletter in OpEd12 cMOOC

You can imagine how different this is from an LMS-centered course. There is no need to prescribe one software application. There is no need to be registered in a password protected and walled site before one can participate. Learners can do their learning anywhere and submit their works in any virtual place. As long as it is tagged, it will be connected to a network of resources contributed by all participants of the course. It is this design that distinguishes cMOOCs from all other MOOCs.

## openness in education



Figure 3. OpEd12 course website

The Oped12 course does have a homepage of its own where it describes the course syllabus, schedule, and procedures for participation. And a participant is asked to register in the homepage, so that they can register their blog and other personal web sites related to the course. The underlying technology under the hood of this blog registration is RSS (Rich Site Summary). The blog publications if tagged are also added to the newsletter. Let me emphasize though that the homepage is not a prescribed gateway to the course. It may be a starting point, but it is still just another node in the entire oped12 network.

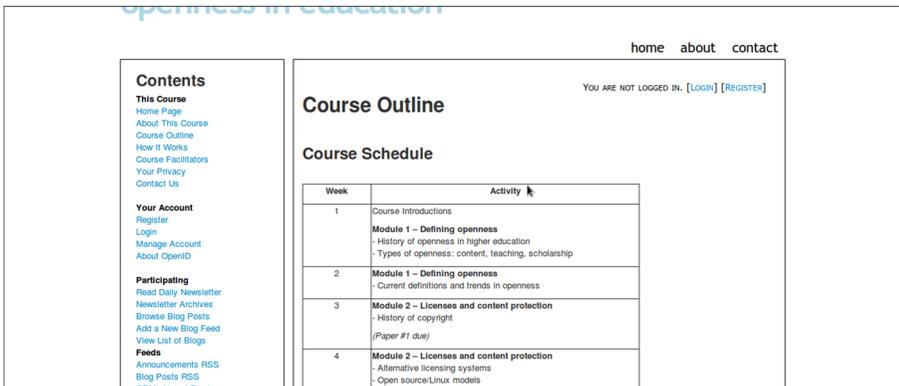


Figure 3. OpEd12 course website

Oped12 is actually a course in the Master of Distance Education program of Athabasca. Participants may opt for credit or just participate as non-credit learners. In most cMOOCs the difference between for-credit and non-credit participants is that for-credit students register with the university as students and pay appropriate fees, their submission is subject to assessment by the university, and they get access to some gated facilities reserved for university students. But the content is the same for both types of students. The course has an outline, and there’s a start date and an end date. It is a course whose design is familiar to anyone who had taken an e-learning course. What makes the outline different is that the details can be changed by negotiation among participants, and participants can spin-off other outlines whenever they want.

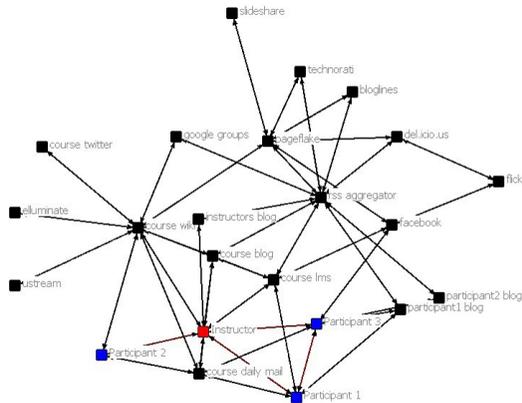


Figure 5. Hypothetical network of participants and content in CCK-08

To illustrate the networked nature of cMOOCs, let’s take the model network in Figure 5. This is a hypothetical model with at least four participants— one of which is an instructor-facilitator and three are learner-participants. All the black nodes refer to websites with particular tools that can be used in the course. This includes the instructor’s blog, course daily mail, Illuminate, Twitter, Slideshare, and so on.

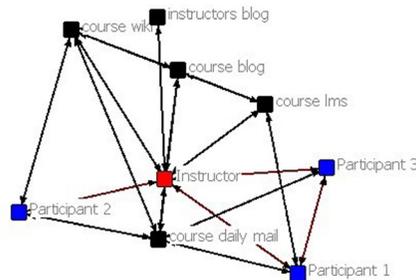


Figure 6. Ego network of the instructor/facilitator in a cMOOC

In a Personal Learning Environment (PLE) in a cMOOCs a participant will not see the entire network. From the facilitator’s perspective for instance in Figure 6, given a distance of one adjacent node, the instructor would be involved in the course wiki, blog, and LMS. In addition, the facilitator will directly communicate with and send a newsletter to the participants via email.

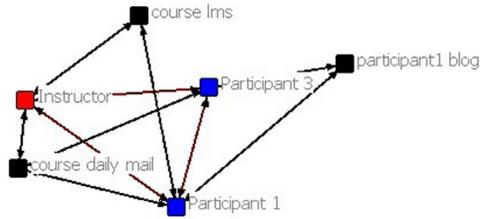


Figure 7. Participant 1's ego network in a cMOOC

Participant 1 may have a different ego-network that represents his/her PLE. Participant 1 may choose to rely on his personal blog, the course daily mail, and the course LMS for updates about the course and publication of his course work. On the other hand, Participant 2 may rely on the course blog, the course wiki and his relationship with the instructor as shown in Figure 8. But Participant 3 (see Figure 9) may rely on the course's daily mail, Facebook, and the blog of other participants. And Participant 3 will not only rely on the expertise of the facilitator but also on the expertise of his/her classmate Participant 1.

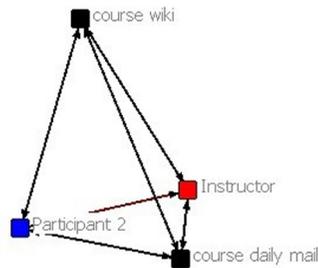


Figure 8: Participant 2's ego network in a cMOOC

Different participants have different centrality in the course network. Each cMOOC participant views the course network differently. The central node or as it is called in Alternate Reality Gaming, their rabbit hole, will be the first website they visit to find out what's going on in the entire cMOOC. Unfortunately, the network model is a static example. In reality

participants can always unlink, and they can always create new nodes. So the course network and each student's ego-network/PLE are dynamic. Therefore, in a cMOOC the contribution of the participants, especially if there's a lot of experts within the cMOOC, is very important because it is the experts who become the community leaders and curators. They are the ones who tell people which nodes in the network will be a good link, what paths would be productive even if it veers off the prescribed path in the course outline, and which participants to contact if one has queries. These network properties are the distinguishing features of a cMOOC. Let us now turn to xMOOCs.

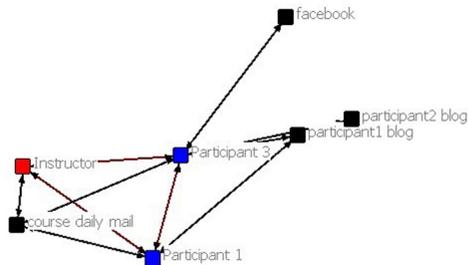


Figure 9. Participant 3's ego network in a cMOOC

What is an xMOOC? The "x" according to Stephen Downes (2013) means extended, in the sense of "MOOC as extension of something else". It is also referred to as AI- Stanford type MOOC (Rodriguez, 2012) based on the successful Introduction to Artificial Intelligence (AI-Class) course offered by Stanford University in 2011 (see course in Udacity at <https://www.udacity.com/course/intro-to-artificial-intelligence-cs271>). This course was a stand-alone experimental course that is the parent of xMOOC provider Udacity.

This model usually focuses on single learning space or an xMOOC software platform in a similar manner as an LMS but with emphasis on broadcasting video lectures. Examples of opensource xMOOC platform software includes Stanford University's Class2Go (see <https://github.com/Stanford-Online/class2go>) that has merged with the MIT's 'Open

edX' (see <https://open.edx.org/>) in 2013; and the Universidad Nacional Educacion a Distancia's OpenMOOC (see <http://openmooc.org/>).

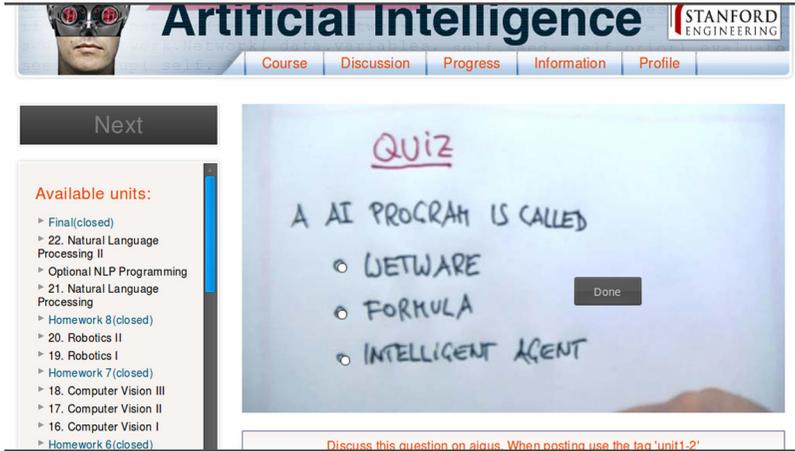


Figure 10: Screenshot of the AI-Class xMOOC

Source: <http://www.ai-class.com>

A participant in the xMOOC, like the AI-Class course, registers in a site that contains the course materials and submission bins. The course content is typically in a series of videos. In this course the videos were hosted in YouTube and embedded in the xMOOC platform. Then the platform overlay interactive quizzes over the video and allows branching by jumping back and forth in the video based on answers to quizzes. The answers are recorded and automatically marked, and then feedback is given in the form of progress bars for activities. Aside from embedded videos they also use existing online discussion forums either embedded or linked to the site. Note that using YouTube, Google Moderator (a feedback management service discontinued in 2015; see [https://en.wikipedia.org/wiki/Google\\_Moderator](https://en.wikipedia.org/wiki/Google_Moderator)), and Reddit (see <https://www.reddit.com/r/aiclass/>) reduced the resources needed to host the xMOOC platform site.

Figure 11: Screenshot of 6002.x xMOOC

The design is similar in the Circuits and Electronics (6002.x) course offered by MITx (now edX; see [https://courses.edx.org/courses/course-v1:MITx+6.002x\\_6x+1T2015/info](https://courses.edx.org/courses/course-v1:MITx+6.002x_6x+1T2015/info)) in 2012. MITx synchronized a transcript with the video. Coursera courses like the Social Network Analysis (SNA) course offered by the University of Michigan in 2012 have a similar design as well.

So the design of an xMOOC is very simple. There is one node and all participants see the same radial hub of resources, that is, they all enter the same rabbit hole. A participant cannot add or change course content; he/she can only submit assignments and participate in forums. For those teaching in an open and distance education institution there is nothing new with xMOOCs. It only appears novel to teachers in brick-and-mortar schools. While cMOOCs is based on the learning theory of connectivism, Marisa Ponti (2014) says that xMOOCs are based on behaviourist pedagogy. Let us now take a look at the next type of MOOC, the mMOOC.

The mechanical MOOC was proposed by the Peer 2 Peer University (P2PU) ([p2pu.org](http://p2pu.org)), MIT OpenCourseWare (MIT OCW) ([ocw.mit.edu](http://ocw.mit.edu)), Codecademy ([www.codecademy.com](http://www.codecademy.com)), and OpenStudy ([www.openstudy.com](http://www.openstudy.com)) using a predetermined set of learning spaces that are connected

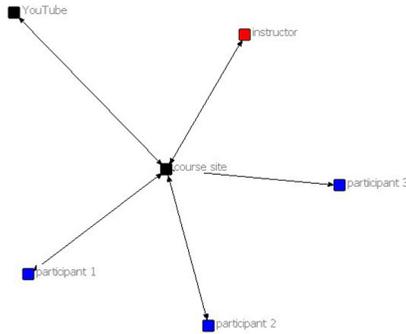


Figure 12. Hypothetical network of an xMOOC

by an e-mail scheduler that is run off the P2PU site. The fundamental distinguishing feature of an mMOOC that separates it from other types of MOOCs is that it has no instructor. Facilitation is done by a machine, hence the term mechanical. What the e-mail scheduler does is similar to what gRSShopper does for cMOOCs. But in cMOOCs, there is a facilitator. There is a person that annotates the newsletter that is sent by email. In an mMOOC the facilitation is automated.

The proponents said that cMOOCs do not have enough structure, and they wanted more structure for mMOOCs so they took an MIT OCW course outline for content, prescribed Codecademy as the virtual laboratory, and organised participants into study groups in OpenStudy for peer support, and used the e-mail scheduler to nudge participants through the course outline. Some of the technologies used in the mMOOC include P2PU's Lernanta, OpenStudy's SmartScore, and Codecademy's online Python programming environment, and its Badges. This is specific to a single example course of the model entitled 'A Gentle Introduction to Python' (see <http://mechanicalmooc.org/>) offered in 2012.

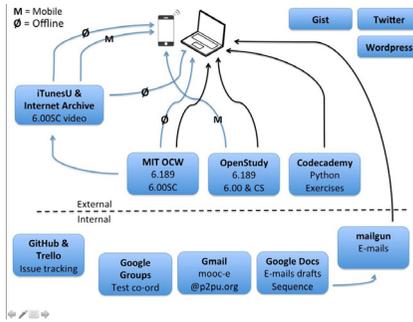


Figure 13: Map of mMOOC tools (MOOC-E, 2012b, licensed under <http://creativecommons.org/licenses/by3.0/>)

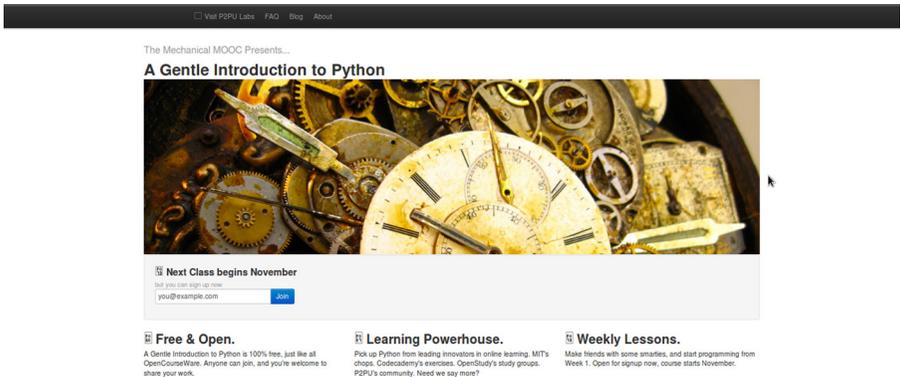


Figure 14: Screenshot of “A Gentle Introduction to Python” course website

After registering an email with the mMOOC site, the participants receive weekly email about the 8-week course. The email contains information about the week’s topic, readings from MIT OCW, relevant exercises from Codecademy, and instructions on how to seek help from peers in OpenStudy. The latter version of the course at <http://python.p2pu.org> is only six weeks, and has a simple outline of information, readings, exercises and a project with instructions delivered in a conversational tone from the MOOC-E robot character that represents the mechanical facilitator. Although there may be links to videos, one will not find the series of embedded videos found in an xMOOC.

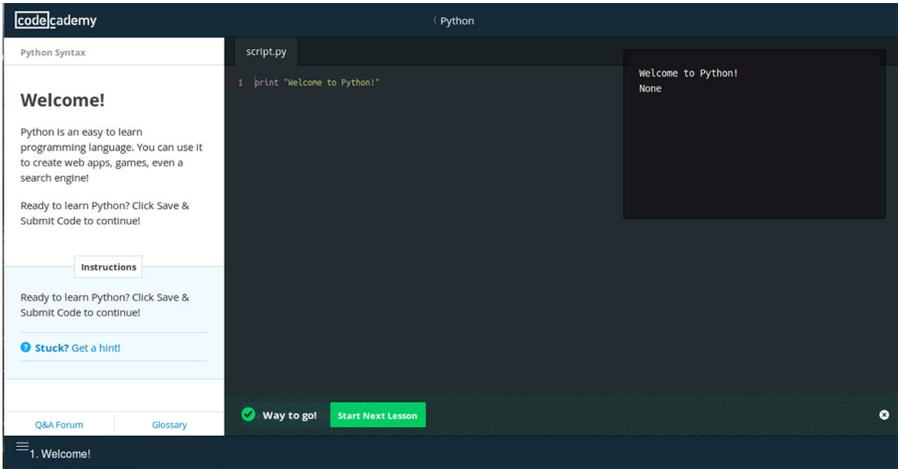


Figure 15: Screenshot of Codecademy Python exercise

The mMOOC liberally uses external motivation devices like points, progress bars, and badges in P2PU and Codecademy to encourage participants to help each other. OpenStudy uses an analytic with a metric with the attributes Teamwork, Problem Solving, and Engagement. The scores for each attribute is interpreted as levels that award titles like Hatchling, Rookie, Lifesaver, Teammate, Champion and Learner.

I represented an mMOOC model (Figure 16) as a complete network. From the vantage point of all participants they can see the same structure of the network from a distance of one. It is the P2PU's email scheduler that serves as a hub within this network. It is multi-platform unlike an xMOOC, and its network is smaller and more structured than a cMOOC. Like an xMOOC, the participants cannot change the MIT OCW content or the Codecademy exercises. Perhaps they can create alternative course networks within their study groups, but this is subject to further research.

I have briefly described the three models of MOOCs proposed as of 2012; perhaps there will be more in the future. How do the MOOCs compare in terms of enrolment and completion rates?

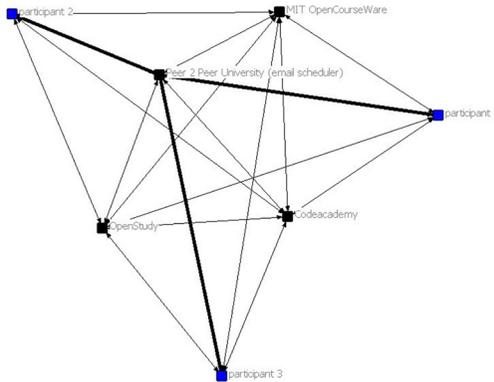


Figure 16. Hypothetical network of an mMOOC

Table 1 shows registration and certification statistics of selected MOOCs. The 2008 cMOOC CCK-08 had 2,300 registered students, but only 25 or 1.09 percent registered for credit. The 2011 xMOOC AI-Class had 160,000 registrants and 20,000 (12.5%) were certified. Interestingly, the AI-Class was offered as an online course and face-to-face class at the same time. Two hundred students enrolled on-campus for credit, but the number dropped to 30 a few weeks after when students transferred to the online version of the course (Rodriguez, 2012). In the MITx 600.2x course, 154,763 registered and 7,157 (4.62%) were certified. The mMOOC had 5,575 registrants and an estimated 336 (5.8%) to 560 (9.7%) who completed. “A Gentle Introduction to Python” course does not certify or grant credits. It can be considered a non-formal course.

The selected data appear to suggest that xMOOCs scale up larger than the other two and have higher completion rates. This is probably due to its design that looks similar to broadcast-based distance education courses. mMOOCs come second in scale, and it appears to be near the design of Intelligent Tutors. cMOOCs are smaller in scale but appear to be larger than face-to-face classes in lecture-hall or LMS-based courses in DE institutions. The cMOOCs design looks like virtual conferences rather than courses. These are just impressions from the selected data; further research is needed. Katy Jordan’s MOOC Completion Rates does

Table 1. Registration and certification statistics of selected MOOCs.

Year of 1st Offering	Provider	Unit	Course	Registered Participants	For-credit/certificate Participants	MOOC Type	Source
2008	University of Manitoba	Learning Technologies Centre and Extended Education	Connectivism and Connective Knowledge (CCK-08)	2,300	25 (1.09%) for credit	cMOOC	(Rodriguez, 2012; Downes, 2008)
2011	Stanford University	Standalone course (Now in Udacity)	CS221: Introduction to Artificial Intelligence	160,000	20,000 (12.5%) - certified	xMOOC	(Rodriguez, 2012)
2012	Massachusetts Institute of Technology	MITx (now edX)	Circuits and Electronics, 6.002x	154,763	7,157 (4.62%) certified	xMOOC	(Gee, 2012)
2012	Peer 2 Peer University, OpenStudy, Codecademy, and MIT OpenCourseWare		A Gentle Introduction to Python	5,775	No certification; non-formal. Estimated completion is 560 (9.7%) - 336 (5.8%)	mMOOC	(MOOC-E, 2013; Ponti, 2014)

not differentiate by types of MOOCs but it may be a starting point. Of 217 MOOCs from 2011-2015, the average enrolment is 25,318.56, and the completion rate (as defined in Jordan, 2015) is 1,922 (15.14%). Course completion rates are one of the barriers to MOOC model development identified by Phil Hill (2012). It is argued that we ought to look at the absolute number of completion rather than the rate. Even if the fallout rate is high, a single course's completion rate would be equivalent to more than one year's worth of completion in a face-to-face course.

The other barriers identified by Hill are credentialing, revenue models, and student authentication. With credentialing, badges or accreditation in MOOCs, even if you have the certificate, can you use it for employment purposes? Can you use it for credit in a university when even the university offering the MOOC will not recognize its own certificate for credit? This issue continues to be a subject for experimentation. Revenue models ask if MOOCs are sustainable. All the MOOC types need funds to host their sites. The xMOOCs spend millions to produce content and providers ask USD 200 for certificates. The mMOOC costs USD 4,000 (Kahn, n.d.) and it is free to participants. This is a question that continues to worry advocates as financial grants for projects dry up.

With the barrier of student authentication, advocates and critics are worried if the people who receive the certificate or credit are actually the people who answered the quizzes, did the projects, and so on. This is a typical assessment issue that is not unique to MOOCs. Distance education institutions have been wrestling with this issue for a long time. A commonly suggested solution is to administer proctored challenge exams to MOOC participants. We have yet to see if such a solution addresses the issue and how it will affect participation.

These barriers to MOOC development - credentialing, revenue models, and student authentication probably worry xMOOC providers more because of their for-profit orientation. The cMOOC and mMOOC participants who engage themselves in seeking self-improvement, and the educational institution that reuses the MOOC content and tools, but assesses locally, need not worry too much about these things. For some educators, issues like pedagogy, feedback, personalisation, self-assessment, and community are far more important than these barriers.

Why would educational institutions offer MOOCs? In particular why should a Philippine educational institution like UPOU offer it? What value do we find in MOOCs of all or different types? Bonk (2012) offered a number of reasons to offer MOOCs. I would sum up these reasons as:

1. Training and employment
2. Promotion or student recruitment
3. Academic program problem solution
4. Vehicle for advocacy and propaganda
5. Academic program development
6. Open Educational Resource production
7. Educational research

Some MOOCs are for training potential employees in competencies needed by businesses. The MOOC provider then provides facilities for matching high performing participants with businesses, and the businesses contribute funds to the MOOC. This strategy is one of the revenue models for xMOOCs.

MOOCs have been used to promote a higher education institution by displaying the superiority of their courses and their star professors. It is hoped that participants would be encouraged to enrol in the institution after participating in a MOOC. This also serves as an alternative admission test that shows actual learning capabilities of the potential student in courses of the program. This reason for offering MOOCs is related to MOOCs that are being sold to institutions as solutions for ailing academic programs. Programs with low enrolment may try MOOCs to test if there are enough students willing to enrol in an online version of the program. Or if there are too many dropouts in a program or some courses of the program, the MOOCs are being marketed as courses that could engage at-risk students. However, the results are mixed. And whenever the results are lower than face-to-face solutions, advocates are disappointed and even turn critics of MOOCs in general without considering if the problem lies with the design of the MOOC course itself. Distance education institutions already know that open and distance learning is not for everyone. It caters to specific students who need an anytime, anywhere education. The difference between xMOOCs and open and distance learning (ODL) students is that ODL institutions have a core enrolment of students committed to completing an entire program. This cannot be guaranteed with xMOOCs.

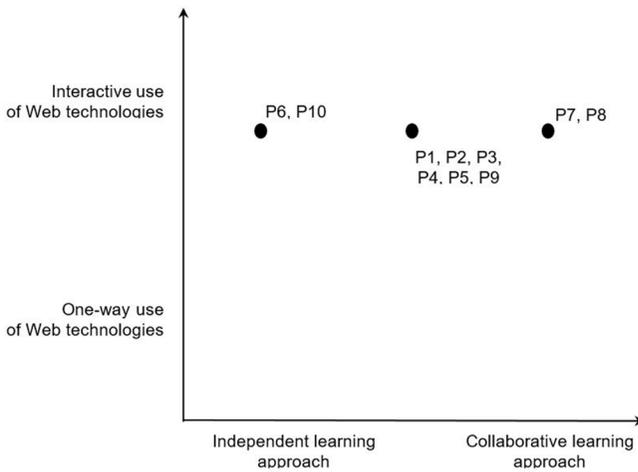
Other MOOCs are vehicles for advocacies and propagandas of civic groups, non-government organisations, and religious institutions just like any other media. Some MOOCs are established as persistent conferences for developing new linking sciences or interdisciplinary/multidisciplinary academic programs by experts from different fields. There are MOOCs designed to develop reusable open educational resources and serve as models of open distance learning courses in a particular topic. And

others are for testing theories of learning, pedagogies, instruction, and educational community building. Are certain types of MOOCs better at applying some of these reasons than other types?

This narrative briefly described three models of MOOCs and some of the differences in their design. It discussed the barriers to MOOC model development and the reasons for offering MOOCs. I am one of the few Asian participants of the first MOOCs, and I find it fascinating to see the viral adoption of MOOCs by ODL and brick-and-mortar educational institutions from 2008 to 2015. Who would have thought back then that this side discussion will be a global discourse in a relatively short span of time, particularly for education that is perceived to be very slow to adopt innovations? However, critics are saying that the MOOC innovation is a spent force that peaked in 2013 and educational institutions and their sponsors are already looking for the next big innovation. If this is true then it is more important now to reflect on the innovation and learn from its lessons. In reflecting one should not generalise MOOCs as being of only one design—that of the xMOOC. Educators should look at the different designs of MOOCs and the different underlying issues and principles that may still be relevant to the future of education.

## CONVERSATION

**Patricia Arinto:** Here is a graph from my study of course design practices in UPOU. On the vertical axis is the type of resource used — i.e. resources that lend themselves to one-way use only and resources that are interactive. On the horizontal axis the movement is from independent learning towards collaborative learning. I plotted the course design practice of 10 colleagues on this graph. You will notice that while everybody uses Web technologies, there is a difference in terms of whether they favour independent learning or collaborative learning. Two of our 10 colleagues are more inclined to the independent learning approach, two others are clearly for collaborative learning, but most — i.e. six colleagues — tend to balance both approaches.



UPOU faculty’s use of Web technologies in their online courses  
(Arinto, 2013)

So we are inclined to make use of both the independent and collaborative learning models. I would also say that we are predisposed to the MOOC. But as Roel has said, we need to be clear about why and how to go about implementing these models. The two propositions we should consider are (1) whether we should adapt open online courses, in addition to the

cohort-based model and self-paced model for our regular course offerings – these are different from an open online course because open means anyone – and (2) which courses we should open up.

My discussion of the self-paced and cohort-based models is framed within the idea that when a student registers for a program, he or she should have a choice between the self-paced model and the cohort-based model for completing the degree.

We have an experiment in MOOCs in the form of the DE Readiness Module, which everybody who applies for admission, at least in the Faculty of Education, is required to complete. It is not moderated, but it is very structured and it is also very short so it's impossible for the students to get lost. The module is designed to be offered as an open online course (OOC) – i.e. anybody can go in; it is not just for applicants to our programs. The link to the module should be put on the website or Facebook so anybody can take it.

**Grace Alfonso:** We can think about combining it with your MOOCs that can do some automated evaluation. Or we can start with OOCs so it will not be massive yet. And these courses can have a separate server – that is, it will not be part of MyPortal where our regular courses are because it will crash. So this will answer our need to meet our mandate of public service, right? And then, at the same time, you can also offer these OOCs for credit, following a business plan so that it can be sustained. There can be a combination of different approaches, and our UPOU MOOCs can be adjusted to what we need.

**Ricardo Bagarinao:** I think the university should think about going into this. OFWs in Japan were asking about whether we are offering a course on how to counsel OFWs there. They do not want a degree program; they just want to have the skill on how to counsel. I think that given our mode of instruction, we might be the leading institution in doing that.

**Primo Garcia:** In terms of market — because markets are very important in MOOCs — the Ivy League universities have been able to attract a large number of students simply because they are Ivy League universities. So a student from Sri Lanka who wants to get a diploma or at least a certificate from an Ivy League university, something that the student could display on the wall, may be motivated to complete the MOOC.

I enrolled in one MOOC but did not finish it. However, I learned a lot of things as well. The same thing was mentioned in Hong Kong where there is a high incidence of suicide among OFWs — that there is a need for Filipinos who are working with communities there to be equipped. So these courses are important. Not many people would be taking them, but these people do not have a lot of resources to invest in education. I am referring here to the likes of our Community Mental Health course. Or even Heritage Conservation, which is very important.

And then there are courses that are in demand among young people in the Philippines — i.e. anything connected to digital applications. It is the young people who are tech-savvy, so that is one market. Another market is in areas where UPOU is well-known, like e-learning, distance education, and use of educational technologies for teaching and learning. I think no one can question our expertise in these areas. We can also offer MOOCs in areas the Philippines is known for like Disaster Management, Arts and Culture, Filipino Arts and Culture or Filipiniana. Nobody can question our expertise in those. And Marine Science, specifically tropical marine science. We cannot compare ourselves with the Ivy League universities because they offer courses that are similar to the ones that are being offered in their undergraduate programs. Perhaps that is not the direction that we should pursue.

**Grace Alfonso:** I would just like to add to the comment of Dr. Bagarinao. There was this visiting professor who used Web-based videos and other Web-based technology for therapy for suicide and for battered women. Perhaps that is what we need. And we have a Master's program in Social

Work so we can also address those needs using our courses.

**Patricia Arinto:** Since we need to start one step at a time, we can target one course per Faculty — i.e., one open online course for FMDS, one for FICS, and one for FED. We also need to think about the technology requirement because it cannot be our MOODLE platform. It needs to be something else, so we need to do our work there. The reason why we need to start with only three at the most is that we need to do these open online courses extremely well because so much is at stake. The reputation of the university is at stake. And so is the reputation of ODeL. In the same way that so much can be gained from this strategy, so much can also be lost if you do not do it properly.

**Primo Garcia:** Expectations are very important. How should we handle students' expectations, even when talking about the different models? When our students come to our courses, they have already been socialized into what education is all about and how they are supposed to learn. I have noticed that sometimes a sub-culture is already formed. For instance, with the MDE students, if you design a course that is slightly self-paced, meaning those with specific instructions, and you allow them to proceed with their own studies, they can survive. But in other courses, like Management, the students expect their teachers to be there facilitating the discussion because they have this idea that Management is supposed to be collaborative. So even in MOOCs, there are expectations. They might be thinking that we handle our courses in a very open, unstructured way and along the way, some people might form a bad idea about ODeL. Take entrepreneurship, for instance. We have to be very careful about offering it as a MOOC because students who complete the course will be investing a lot of resources after they finish the course, thinking that what they've done in the course is what they will apply in real life. And if they fail, they might blame the University for their failure. So we have to be very careful.

**Patricia Arinto:** Once we adapt different models, we have to be careful about tagging courses. For example, Athabasca University indicates two delivery modes – individual study and group study. Each delivery mode is described and courses are listed under each mode. Student support is very important and it is part of the management of expectations – i.e. learner relationship management. Learner relationships bog down when we are unable to provide the basic services learners are entitled to, regardless of the mode of study. It is not enough that you tell them that this is the way you will do it. If I enrol in an open online course, if I leave the course happy, then I am encouraged to enrol. And then I enrol formally in a degree program because of my experience in the open online course. Even if the mode of delivery is different, I should be able to see that I get quality service and so I will adjust. It is really our QA, the quality of service, that is very important.

**Grace Alfonso:** In the MOOCs offered by Ivy League universities and other prominent universities in the US, like the Stanford University course with 160,000 enrollees, it is the tutors rather than the university who sign the certificate. In other words, it is like a project. So what I am saying is you can also look at it that way – it is a service and at the same time you experiment, you explore. But the reputation of the university should not be dragged down. When you are experimenting, you should be doing your research on it, just like when Berkeley became famous for cloud computing because it was such a big research for them.

**Patricia Arinto:** It is as if they are doing a beta test.

**Grace Alfonso:** Yes. So what I'm saying is there are many approaches and also many plus factors that will come in. The negative is a possibility, but if expectations are very clear and you tell them in a really transparent manner that this is what we are doing and so on, then I think the mistakes will be minimized.

**Primo Garcia:** I was not able to finish the MOOC I enrolled in but I feel that I got something out of it because the materials were well made. So even if I was dissatisfied with the way the discussions were going because it was anything goes, I appreciated the fact that the materials were of high quality, I could download the materials, and I gained something at the end of the day. They also used the peer-to-peer monitoring of plagiarism that Roel raised earlier. I received an email saying that I should report any incidence of plagiarism to the teacher. They had emails like these.

**Patricia Arinto:** Your experience can be explained by Anderson's (2003) Equivalency Theorem which states that you can offset the lack or the poor quality of one or two of the three forms of interaction — learner-learner, learner-teacher, and learner-content interaction — if at least one form of interaction is at a high level. He says: "Deep and meaningful formal learning is supported as long as one of the three forms of interaction is at a high level. The other two may be offered at minimal levels, or even eliminated, without degrading the educational experience. High levels of more than one of these three modes will likely provide a more satisfying educational experience, though these experiences may not be as cost or time effective as less interactive learning sequences" (Anderson, 2003). For example, if you have a high level of teacher-learner interaction, that is not cost effective and the economies of scale will be low. It has to be high learner-content interaction for the MOOC, and maybe high learner-learner interaction. The quality of the learner-learner interaction is uncertain but there are technologies that will allow you to do that.

**Roel Cantada:** May I respond? One of the things that I have been trying to communicate not only here but also during the conference that we had in Japan is that we should not allow ourselves to limit our discussion to xMOOCs. It is in the xMOOCs, which are underpinned by behaviorist learning theory, that you will find low teacher-learner interaction. But in cMOOCs, the facilitators are actually highly engaged.

**Patricia Arinto:** The form of engagement seems to be different as well.

**Roel Cantada:** The facilitators engage in the instruction and discussion like in a conference. But the engagement stops at the assessment stage because they provide assessment services only to those who pay, for obvious reasons. Therefore, it is possible to have high engagement. You participate in the network of the course and become part of a community just like in a social network. But this is in a cMOOC. With regard to branding, this is important in xMOOCs but not in cMOOCs. In cMOOCs it is about the topic, it is about the discussion. It is in the xMOOCs where there is a low level of learner-teacher interaction and high learner-content interaction. I would like to ask people to please distinguish between the types of MOOCs because there are MOOC models other than xMOOCs.

[In hindsight may I add that my concept of reaching economies of scale for xMOOCs and cMOOCs are different from each other. For xMOOCs large scale enrolment is achieved with a one-to-many or broadcast approach similar to lecture-hall face-to-face courses. In cMOOCs, scaling is achieved through what we call rhizomatic growth like when a patch of grass will eventually spread to an entire field, or how viral videos increase their audience through word of mouth. The MOOC discourse for instance is just a side discussion in the first MOOC CCK-08, but it has spread, grown, and at times become distorted across time and space. It has become a global phenomenon in six years, and even this narrative is a branch of the original discussion in 2008. There were probably only 2,300 people who knew about it in 2008, but now millions know. The original proposal for a MOOC is that it be persistent like a Massively Multiplayer Online Role-Playing Game (MMORPG) where the game does not stop. People can leave and come back again to the course and pick up where they left off even after many years where former novices become mentors for the new generation of participants. This is how cMOOCs grow in scale.

**Patricia Arinto:** So one part of my sentence is true of the cMOOC and the other part is true of the xMOOC. I would like to show you the DE Readiness Module. Some of you have seen it but many haven't. This system uses self-registration. Applicants are sent instructions on how to enrol in the module. Everything that they're supposed to do is already here. The first topic is: "What is distance education?" They are supposed to read a short article and then take a five-item multiple-choice quiz on what they read. Because the quiz is automatically marked, they can check their scores. They are allowed two attempts. For most of them, their scores are very low in the first attempt — they get scores like 1, 0, and 2 — and they get upset and they take it again. I know they are upset because of their replies to the feedback questions at the end of the module. There are three questions: "Which part of the module did you find easy to do and why?" "Which part of the module did you find difficult or challenging and why?" And "how do you feel about becoming an online distant education student after going through this module?" They have to submit their replies to these questions in the form of a document to be posted in an assignment bin.

So in the first part of the module they read and they take a quiz. In the second part they watch a video. This is a video about Alex and Lisa talking about their experience as DE students. I think this is about 5 or 6 minutes. And then they join a forum. The forum has only two questions and they can choose between the two and they are told to post a reply that is not more than 150 words. The first question is: "What are your personal motivations for wanting to enrol in this distance mode? How do you think will it help or hinder you from completing the program?" Their motivations can have an impact on their persistence. The second question is: "What do you think are the challenges aside from those mentioned by Lisa and Alex?" The ones with high potential for self-learning are those who know how to read and comprehend and really engage with the way you have formulated the question. The others get sort of lost. Anyway, so those are the two threads and then they reply. In their replies you will see what their motivations are and why they want to study in distance mode. And some of the stories are really heart-wrenching — girls who got pregnant early, kids who have to

work because they were poor and they have to stop schooling, people who became disenchanted during their college years or who became bored and dropped out but now they're getting married or they have a son and they want to be a good model. There are so many stories that you can do a whole analysis of this whole thing.

The last portion is an online learning readiness survey which we borrowed from the University of Colorado and Buffalo State University. And then they give feedback on the module.

The entire module, which you can complete in one sitting, takes you through everything you have to do as a student: you have to read; you have to take a quiz; you have to watch a video; you have to join a forum; you have to submit an assignment using the assignment bin. So the module sort of shows them already what it is like to study in distance mode. They learn about DE not just from talking about it, but from the process they go through. Because it is not very different from our course, when they enter our courses, they are prepared.

Also, the course is not moderated and nobody facilitates the discussion. That is why it is highly structured. You can have a self-paced or independent study model if it is highly structured. Otherwise, it will not work because you will be pestered by students with all of their questions. They will ask what will they do now, what they will do next, where would they submit it, and when is this due — if you do not have clear instructions. In this module you have a lot of instructions. One of the things students say in their feedback is that what is supposed to be done it is very clear and they have a better idea of what they are going into.

**Primo Garcia:** This is also related to the extent to which the students are diverse in terms of their interest and backgrounds. Our students have different professional and disciplinary backgrounds and interests. So a structured format would be just fine. My interpretation of the cMOOCs mentioned by Roel is that it is particularly applicable to special interest

groups. Even before they join the online course they are already embedded in the discourse and they have already developed their own way of doing things, of interpreting things. And some of them might have been part of discussion groups before, like those techies who form communities. That is the sense that I got from reading about Connectivism. I don't understand it fully but my initial take is that it is an educational philosophy as well as a social theory. It assumes that knowledge is distributed in modes and systems that are akin to the power and knowledge structure discussed by Michel Foucault in social theory.

**Grace Alfonso:** Actually the DE Readiness module is a possible OOC, right? At the same time, it is such a great promotional material and it can be the start of a screening process. Even if they are not yet considering UP Open University, they will now know what distance education is all about. What we need is an educational culture that appreciates another way of learning. And that culture is already in front of them. At the same time, it has a good design, it is not intimidating at all. So you can have friendly courses like this that can be for public service. At the same time you can tap into projects or partnerships that look at helping out in a community of practice. There is potential for engaging in public-private partnerships because it is also a need, an answer to a particular law. It is another way of using these models and coming up with our answer to the demand for MOOCs that is not contrived because it is normal for us to seek it.

**Ricardo Bagarinao:** I think this has the most potential to be adopted by the university. We have the facilities to develop this kind of course. It is just a matter of strategizing to be able to implement it. For example, perhaps we can request the visiting professors to develop this kind of course.

## **POSTSCRIPT AND REFLECTION**

The conversation revolved around whether UPOU should offer open online courses which are not necessarily massive but which follow the principles of MOOC design and delivery. It was suggested that UPOU offer open online courses for public service and in areas that the University is known for. The discussants emphasized the need to assure the quality of courses, and noted that there are many ways of designing MOOCs and various models that would fit the particular needs of the students of the university.

The DE Readiness Module was discussed as an example of an open online course that is self-paced and designed for independent study. The module is designed to give individuals seeking admission to UPOU programs a hands-on introduction to online distance education. It has no facilitator and is highly structured. However, the module is short, and it is uncertain whether the same approach can be applied to a longer course where keeping learners engaged and motivating them to complete the course would be a concern. This is an issue that MOOC models without facilitators are trying to address.

As a postscript to this roundtable discussion of pedagogical models for ODeL held in 2012, UPOU joined the MOOC bandwagon in 2013 and it has since offered a number of MOOCs in mobile applications development, business process management and e-service management, local governance, and child rights protection, in collaboration with industry partners, development organizations, and government agencies. In addition, the DE Readiness Module has been supplemented with open online bridge courses in College Math, College English, and Online Learning Skills. Also, in 2017 the independent learning delivery mode is being piloted initially for UPOU degree programs with small enrolments.





## CHAPTER 8

### A Sub-discourse on Sustainable OER Issues and Prospects

Primo G. Garcia  
Joane V. Serrano  
Alvie Simonette Q. Alip

#### **CONTEXT**

As early as 2011, the UPOU has been conducting discussions on open and educational resources (OER) within and outside its circle. Critical reflections and multidisciplinary perspectives were raised on what will be the role of the university in creating, utilizing, and promoting OER given the established views and mindsets on copyrights and intellectual property rights in knowledge production.

Globally, OER have been widely shared, and used, but there are scarce contributions from the academics from developing countries as most OER were produced by the West. It is in this note that the Philippine universities and other institutions involved in knowledge production should be prompted to create their own materials and make their own mark in education resource production and sharing. As part of the National University and a pioneer in the Philippines in open and distance learning, advocating the use of open educational resources is a good opportunity for UPOU to make learning within the reach of more people.

This narrative is an offshoot of the presentation during the 6th Round Table Discussion on “The Openness of the Open University” with sub-theme on “Open Educational Resources” held on 12 March 2013 at the UPOU. It attempts to draw lessons from the experiences of Vibal Foundation, Inc. in OER, and identify the challenges UPOU is facing in light of its metamorphosis from merely OER users to OER creators. This is a serious endeavor for UPOU, needing careful institutional thought and purposeful action, while fulfilling its mandate of widening access to quality education.

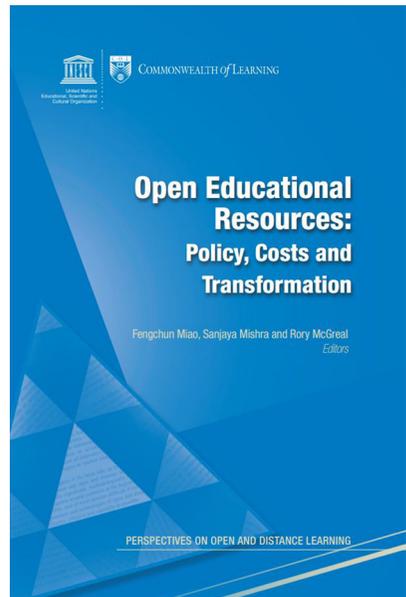
## NARRATIVE

### OER Definition

The Organisation for Economic Co-operation and Development (2007) defined open educational resources (OER) as “digitized materials offered freely and openly for educators, students and self-learners to use and reuse for teaching, learning and research”. OER can be legally and freely copied, used, adapted and re-shared. Any educational materials that are in the public domain or introduced with an open license are also classified as OER.

### OER in the Philippines

Just like in other developing countries, open educational resources are not very popular in the academic setting in the Philippines. In most discussions on OER, the question asked is always about how can it be sustained considering that users will not pay for the production and distribution of resources and materials produced. Dholakia (2006) defines sustainability in terms of long term viability and stability OER.



This narrative draws upon the case study that the authors have done on Vibal Foundation’s open knowledge initiatives. Vibal Foundation was chosen for a case study in the book “Open Educational Resources: An Asian Perspective” published in 2013 by the Commonwealth of Learning because of the Foundation’s pioneering efforts as a publishing company to advocate for free and open repositories of knowledge. Based on the

case analysis, implications for UPOU on sustainable production and use of OER are also discussed.

In discussing sustainability, it is important to answer first the questions, why do we really need OER, and why is it desirable in the first place? OER communities have argued that OER increase value of resources and afford authors to be cited more frequently hence increasing impact (Open Citation Project, 2005). Willinsky (2010) pointed out that open access allows the content of journals to be globally visible, enabling it to show in Google Scholar search pages together with more popular work on same topic. Downes (2007) noted that authors conducting inquiries on OER look at the inefficiency of commercial distribution. Kansa and Ashley (2005) in Downes (2007) argue that the value of research data increases ten times with openness considering that statistics reveal that only 27 percent of research papers are published while only five (5) percent of research papers are shared.

Advocates further argue that various stakeholders of OER benefit from OER; for authors, OER enable access to the widest possible audience; for readers, OER enable access to an entire body of literature; for publishers, OER guarantee the widest dissemination of the articles they publish; for the funding agency, OER obtain the highest impact for its investments; and for universities, like UPOU, they obtain increased visibility in their scholarship.

### **The Case of Vibal Foundation**

One of the leading advocates of OER in the country is the Vibal Foundation, Inc. (VFI), which was established in 2007 as a non-stock, non-profit organization by the Vibal Publishing House, Inc. (VPHI), a major player in the Philippine educational publishing industry. To achieve its vision of creating “free and open repositories of learning - the Philippine knowledge space - on the Internet” (Vibal Foundation, 2012), VFI partnered with government agencies (e.g., the Department of Education), and non-

governmental institutions (e.g., the CK-12 Foundation). Based on Downes' (2007) funding models, this can be classified under the partnerships and exchanges model, which, according to Downes, "perhaps not thought of as a funding or financing model" but "nonetheless play an important role, or potential role, in the development of OER networks."

Built on the idea of free and open knowledge as instrument of change, VFI created and pioneered several OER initiatives, which are briefly discussed below.

**OER in the Philippines:  
The Case of Vibal Foundation**

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**OER Initiatives**



[www.filipiniana.net](http://www.filipiniana.net)

**Filipiniana.net**  
a digital library and  
institutional  
repository

UP OPEN UNIVERSITY 

*Filipiniana.net* is an online digital library and institutional repository of books, documents and non-textual materials about Philippine studies that can be freely accessed by anyone.

*WikiPilipinas* is a free online free-content encyclopedia on the Philippines. It includes materials not only on history, but also illustrations, maps, books, and anything else about the Philippines. Since it is free, anyone can access these materials.

The *Philippine Online Chronicles* (POC) is a media network and news aggregator. Unlike the typical online news page, the news in POC is

not straightforwardly presented, and contributors can include their perceptions and opinion about the news article. *e-Turo* is a free e-learning portal. The aim of Vibal Foundation is to make these learning materials, which cover English, Math, Science, and Social Studies, available for basic education teachers.

## OER in the Philippines: The Case of Vibal Foundation

### OER Initiatives



WikiPilipinas

an online, free content encyclopedia on the Philippines

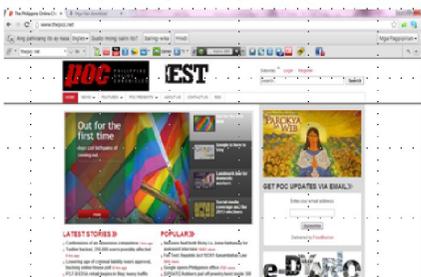
[www.wikipilipinas.org](http://www.wikipilipinas.org)

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## OER in the Philippines: The Case of Vibal Foundation

### OER Initiatives



The Philippine Online Chronicles

a media network and news aggregator

[www.thepoc.net](http://www.thepoc.net)

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## OER in the Philippines: The Case of Vibal Foundation

### OER Initiatives



e-Turo  
a free e-learning  
portal

[www.e-turo.org](http://www.e-turo.org)

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## OER in the Philippines: The Case of Vibal Foundation

### Cost & Usage

OER Initiative/ Project	No. of Hits (1 Jan. 2011 to 10 Oct. 2011)	2011 Budget (PhP)	Delivery Cost Per User
Filipiniana.net	500,000	1.8 million	3.60 pesos
WikiPilipinas	17,000,000	2 million	0.12 cents
The Philippine Online Chronicles	1,000,000	2.8 million	0.35 cents
e-Turo	250,000	1 million	0.25 cents

Source: Vibal Foundation at a Glance print brochure (2012)

UP OPEN UNIVERSITY 

In terms of cost and usage, the January to October 2011 usage data revealed that WikiPilipinas had the most number of hits at 17,000,000, and with the lowest delivery cost of only PHP (Philippine peso) 0.12 per user. This was followed by POC with 1,000,000 hits and delivery cost of PHP0.35 per user; 500,000 hits for Filipiniana.net at PHP3.60 per user, which has the highest delivery cost; and 250,000 hits for eTuro, the lowest among the Vibal initiatives at PHP.25 per user. To benefit a larger number of teachers and students, there is a need for Vibal to promote the use of e-Turo more.

The lessons the authors learned from the case of the Vibal Foundation can be summed up into three: (1) niching, (2) combination of what is free and what is saleable, and (3) sustainability.

### ***Niching***

This simply means doing what one is good at. The Vibal Foundation's mantra of "Open books, Open Minds" tie with their education and literacy programs; acclaimed books on Filipiniana, art, and history by writers and scholars; and innovations in digital publishing. Since the Vibal Publishing House cater to publishing, the core focus of establishing Vibal Foundation is still publishing but with a different business model. While the Publishing House sells books, the Vibal Foundation offers free and open repositories for learning. Vibal has positioned itself in such a way that it is the only institution that provides open knowledge at the moment in terms of the area of publishing. It has positioned itself to meet the unmet demands or gaps of the knowledge sector here in the Philippines. And, up to now, these gaps are still being ignored by knowledge supplier or providers. In the case study, Vibal has strategized itself by, providing or sharing knowledge about the Philippine culture and other resources that will help the Filipinos directly.

### ***Combination of what is free and what is saleable***

The flagship program of Vibal Foundation is "open knowledge" which goes with its vision to create open and free repositories, meaning it's costless and open for all. In addition, the Foundation is able to launch "Vibe," a free e-bookstore and app that is downloadable free on PCs, Macs, and tablets. Through "Vibe," the Foundation can also produce books that can be sold in the market. They said, that e-commercial books may cost 20 percent less than the printed version. Vibal Foundation has established itself in terms of providing free, online learning repositories but at the same time it has also developed applications which are being sold in the market.

## ***Sustainability***

In order to sustain the vision of the organization, Vibal Foundation partnered with other institutions to make it sustainable. They have partnerships with government agencies (e.g., Department of Education, Department of Health). They also partnered with NGOs (e.g., CK, 12 Org Foundation) and private institutions. Moreover, the Foundation's exposure to digital technologies has been crucial in bringing the publishing house to the digital publications market. Since the Foundation was exposed to digitizing the materials and making them public, the publishing house also had the opportunity to serve the digital publications market.

## ***Implications for UPOU***

An examination of the previous case yielded the following implications for UPOU:

### ***Rationale for pursuing OER***

The university needs to reflect on its motivation for getting into OER, as this would define its scope of involvement in this area. As an institution of open and distance learning, UPOU is expected to provide wider access to quality education. OER is a good opportunity for the university to make learning within the reach of more people. At the institutional level, the sharing of OER provides universities the opportunity to increase their institutional profile. Based on the experiences of other universities, sharing resources with others enabled more people to get to know about their academic programs, leading to increased enrolment. Since OER are offered for free, more people can get to read and use them. This increases the profile of the authors and brings them more opportunities to network with their peers. As it is, the production of OERs has been dominated by the West. Getting into OER gives the university the opportunity to provide the Filipino people the perspectives and approaches in the field of various areas and make these contributions more accessible to more people. As part of the

national university, UPOU is expected to help upgrade the quality of higher education in the country through the provision of well-designed and freely accessible educational resources.

### ***Acceptability of OER in the UPOU and the larger community***

Just like any community, members of the university have different perspectives on OER and its role in education. Not everybody in the open and distance learning community in the world supports OER. Some open universities are heavily invested in licensed materials and they benefit a lot from these. The university needs to define its framework for OER not only in terms of its mission but also the larger UP framework on intellectual property rights.

Going beyond the university, we need to examine how the larger academic community values both the production and consumption of OER. The Philippine higher education sector is unique in the region since it is highly dominated by private interest. Majority of the universities and colleges in the country are privately owned and that would have implications on the production and usage of OER as well.

### ***University resources that can be openly shared***

The capacity of the university to get into OER depends largely on the availability of educational resources that can be shared openly. For one, UPOU had developed numerous modules for all the courses it has been offering. The university can start sharing some or parts of the existing modules, with permission from the original authors. In addition to the modules, the university has also created other learning objects (e.g., video lectures) that are used in both its formal and non-formal courses. However, many of these materials (e.g. video recordings of symposiums and seminars) would still require editing before they can be shared publicly.

### ***Human resources for OER production***

Another important factor in OER creation is the availability of a critical mass of active and engaged users and producers. In terms of production, the university needs to identify who among its academic staff members are capable and willing to create OER. As a university which draws its teaching staff from multiple campuses, UPOU will have to think of mechanisms to encourage both its regular, affiliate, and adjunct faculty members in OER development. In addition, UPOU also needs to understand the motivation people would have in developing OER as this would influence their level of involvement in it. The university would also have to consider its content expertise when it comes to deciding what OER to produce. There is a wide range of OER available on the web and much of it has been produced in the West. The university needs to identify the areas or topics where the demand is most felt and where it can contribute the most in terms of provision of local perspective or insight. Since most of OER is digital, the university also needs to assess the readiness of the OER creators in presenting their ideas in digital formats.

### ***OER user requirements***

In the consumption side, there is a need to identify the potential users of OER in the country and the kinds of OER they require. The university has to understand the similarities and differences between and among the OER needs and preferences of teachers, students and other learners. Each sector would have its own needs and requirements and the university may be required to prioritize the groups of learners it may want to focus on.

### ***Funding***

Since the production of OER entail cost, the issue of funding remains relevant. Here are some OER funding models (Downes, 2006) that the university can consider:

*Institutional model.* The university can start its OER initiative by shouldering the initial expenses. Most of the materials it currently has on the UPOU networks were university-funded.

*Membership model.* UPOU may decide to join a consortium of organization involved in OER and simply pay an annual subscription fee to be able to access an OER service.

*Donation model.* UPOU can seek donations from the wider community to fund its OER initiatives.

*Conversion model.* UPOU gives its resources away for free and then converts the consumer of the freebie to a paying customer, as what other institutions have already done. A good example of this is Vibal Publishing, which, after creating a reputation as open knowledge provider, is now able to use this advantage to sell ebooks to schools.

*Contributor-pay model.* Commonly used in open access journals, this model would require users to pay a fee for maintaining the contribution, and later UPOU subsequently makes the contribution available for free.

*Sponsorship model.* There is a possibility of selling advertisements or sponsorships to institutions to fund the production of certain resources.

### **OER Repository**

The university also needs to determine the platform through which it shall disseminate its OER. At present, the university makes all its video materials available through the UPOU Networks. Regardless of the platform it decides to use, UPOU needs to define the kinds of OER that can and will be included in the platform and the process for approval for the inclusion of materials. UPOU should decide if external users can upload resources on to the platform or if they can amend the resources. Does it have to be approved first? Can users amend the resources? Are we going

to give it for free? To all? Or what about the private institutions? Can they also make use of our OER for free?

### **OER Culture**

There is a need to create an OER culture and that requires redefinition of the role of the academic staff as public intellectual in the digital environment. This has implications on the way we define extension, community engagement, and even research. UPOU may have to implement incentives to encourage its staff to make the resources they create openly accessible. Public service will have to be redefined to include production and sharing of OER. When it comes to research right now, the impact of publications is still limited to number of citations in peer-reviewed journals. In this OER era, would citations in social media be included as part of academic outputs?

UPOU also needs to establish the appropriate structure. We need to match the strengths of the UPOU and the needs of the external environment. We need to forge partnerships because this is something that cannot be done alone as shown by the experiences of other universities even in the case of Vibal. And then, we need to define our OER model and framework in terms of content, staffing, technical, and funding. And we need to pilot-test it and evaluate and continually enhance it. Some of the existing models exist in other universities. We need to create our own and the challenge is, what would be that, what would be the framework and model for UPOU?

## CONVERSATION

After the authors' presentations on the case, an open forum ensued. The following are the themes that emerged from the conversation on OER among the participants of the workshop:

### **OER is sharing learning resources in multimedia formats**

**Patricia Arinto:** The discussion so far has something to do with the development of visual materials. But OER encompass instructional materials in all media formats, including text. So we can begin with opening up the text materials that we already have.

Also, we do a lot of remixing in the sense that we put together a course package consisting of different learning resources. OER-based practice is also if I can take something you did and change it and then relicense it. Looking into licensing is crucial.

### **Media format of OER influences extent of sharing and reusability**

**Patricia Arinto:** When we make material available in PDF, that's already an issue. You can't do anything with PDF except reproduce it as is. You can't cut up the text and produce a new text. So that's the other thing — we need to figure out our position with regard to opening up, putting our materials online, and not charging instructional materials fees. If we can make this important first step, then we can think about the next levels, including licensing as Prime has pointed out.

**Primo Garcia:** I think there is really a need to discuss the level of openness that we like to pursue. Because this is an implication on the materials that we are trying to produce and in what way are we going to create them. If we want the materials, reusable, re-mixable and all these, then we have to think of ways that the users will be able

to disaggregate them and use them for the context they want and purpose for which they'll be using it. The packaging of the materials, they're quite difficult to disaggregate, and it would look good for other people, but for some of the users, it's quite difficult to use. We have to think of the policy framework and these resources make sense in the context of a learning situation. That is why we cannot separate the issue of OER with the issue of MOOCs. So when we open our resources we open them also side by side with the learning situation.

### **OER creation is collaborative**

**Dinah Nadera:** So in addition to Ms. Pat, a clear cut of examples that we are able to produce are there are classes that are being recorded, or we receive several requests for recording... When they request, we need post production instructions from the faculty so we in MC would know what to do. So if you think you have an old material that you think can be used, all you need to do is give post production requirements so we can edit them properly and then it's already something that you can contribute.

### **OER covers both production and usage**

**Patricia Arinto:** OER refer to resources. Aside from that we have to look at the more general context of open practice. How open are we? I mean it's one thing to produce OER. But what do you actually do to make it available to others? That's part of practice, right? How you use it is part of practice, too. The pedagogical side is part of practice. You say you're putting them all out on the network. And then what?

**Primo Garcia:** And the OER don't stop with the production; it also goes to usage. That is why license is a very important issue. We might be surprised the way the users would use it. It will come to a point that it will not be used as an educational material. The material you made was already made for artistic expression. It is valued and labeled for a

value you may not agree with. So you need to be aware, all of us need to be aware of the many implications. If we just post everything on the web, hoping people would use it, it doesn't necessarily follow.

### **OER can be an individual initiative**

**Jean Saludades:** I am thinking, we are users, we are not sharers of OER so I was reflecting with myself for the most part. So I was asking myself why is there a need for institutional position or policy for me to share what I've been using in my courses or even in my research that is somehow related to what the Chancellor has shared that we can do that individually. We don't really have to wait for the university to make a stand whether we are for, I'm sure we are in support or supporting OER or whether a policy or official announcement that we can make our OER materials. I don't know if we need to wait for that institutional pronouncement.

**Grace Alfonso:** From what you do as a professor, as a researcher, you can turn your printed texts, your research papers to something that you may want to think about it, you might want to share with everyone for free, even if you're looking at it for publication later on. Whatever you have, you can have it out there already as long as with correct citations.

### **OER initiatives require institutional involvement**

**Patricia Arinto:** The university has IPR rules. The courseware Sheila developed for the Nursing Practicum course is open access because all IDRC-funded materials are open. But the licensing of UPOU-developed materials is something else. OASIS has to go that extra step and apply a relevant Creative Commons (CC) license for them to become OER. There are different CC licenses and it is necessary to figure out which one should be applied. In the case of our OER-based course materials, there is a need to check which CC license is carried

by the OER that is integrated into the material to determine which CC license can be applied to the material as a whole.

**Sheila Bonito:** Actually for me, I would rather that there is an institutional guideline for OER. Even though we are already sharing our work, I think we will still benefit if we have some direction to guide us on what course packages to develop for OER. Also as an institution we will be more strategic and then we can address all the other issues that OER will open. Because we don't stop there, actually when we start producing OER we will have more issues that we have to face. And so if we don't plan for those policies and guidelines, we might have more problems because we're opening up literally to the world so I really think we have to think about it. We'll try to discuss some more what policies will be needed.

**Primo Garcia:** So to create a brand, so people would go to UPOU repository because they're going to find something there that they need, that they cannot find from MIT, from other sites. We cannot identify that brand unless we discuss what are our policy framework and position. What makes it from other OER initiatives.

As an institutional initiative, universities can draw upon their institutional strengths as shown in the following:

**Primo Garcia:** How do we put these resources in massive online courses so that people would be able to use their source as well. At least from the perspective of Open U, if one of our purposes in OER is to increase our institutional profile, that is also one of the goals that we can achieve through MOOCs. But I think it would increase our institutional profile if we make resources that we ourselves produce and we share.

The easiest part I think is the first level. Look at what we have and then decide how to share them or up to what extent are we going to share them. That's what others have been doing, MIT, even Vibal, the most successful side of is WikiPilipinas and that's basically an adoption of Filipino content of Wikipedia. Because they saw an opportunity. From Wikipedia, they linked the content to WikiPilipinas. So they started with what they have and what they could do. And I think we have a lot of resources already. We've been producing a lot and we have to decide how we're going to share them and up to what extent. And from there, after doing that and identify what are the focus areas that we could focus our energies on. The discussion on MOOCs I think also have an implication on what areas we should focus on. What are the needs of country that we need to cater to. The funding will even come from the needs of the country, on the plans of the national government, on the trends in the international arena. Funding also goes with that and secondly, we also have to identify. There are some areas that I think it's quite difficult to find funding for we need to offer this simply because we need to. Like for example, anything about Filipino perspective, Filipino culture. Sometimes they have funding, for other situations none, but, this is part of our mandate.

**Joane Serrano:** ...That's why we shared the lessons we learned from Vibal Foundation because they were able to strategically work together, the publishing and the foundation in combining and strengthening both their conditions. By combining what is saleable and what is free, so I think that's one model which we can reflect on here in UPOU. And of course the model which Sheila used is a very good model which we can adapt. You can look for funding institutions which will be willing to sponsor our OER initiatives.

## **POSTSCRIPT AND REFLECTION**

Several years after this roundtable discussion was held, UPOU has already developed a policy paper to provide a framework for the development and consumption of OER in the university. Much of the original open educational resources produced in recent years have been developed as part of the creation and delivery of massive open online courses (MOOCs). Most of these initiatives were funded by other institutions. The availability of funding facilities shows that other sectors in society find value in OER, particularly in the context of online courses. The university's experience with MOOCs has shown the potential of OERs as a learning resource when they are used in accessible online courses.

These OER, mostly in video formats, are made accessible in the UPOU Networks (<http://upounetworks.net>) - the web-based OER repository created by the university. Much of their use, however, have been in the context of the MOOCs and/or formal courses that the learners take.

The experience of Vibal has illustrated that OER are best disseminated in accessible platforms. Vibal has shared a wide range of resources drawn from other sources. The news items it has aggregated and wiki articles have been extensively used by the public. The company is now an active player in the distribution on interactive e-books for basic education. It was able to parlay its experience in open knowledge initiatives to commercial applications.

Similarly, UPOU was able to take advantage of its reputation in open and distance e-learning in securing the support of various international, national, and local organizations in developing MOOCs, which require the creation of OER. Organizations like the Asian Development Bank, UNICEF, and Philippine Long Distance Telephone Company have lent support to the university's MOOCs initiatives, which involved the production and dissemination of OER in various formats. Recently, the university has produced stand-alone OER (e.g., videos on technology-enable learning,

general education, etc.) that can be used in a wide array of learning contexts. In addition, UPOU was also able to draw upon the Academic Program Improvement (API) funds provided by the UP System to allow UPOU faculty members to develop OER for their individual courses. These experiences indicate that institutional support (e.g., funding and incentives) is needed to jumpstart the production of OER, but the rate of participation among academics in OER production and sharing has largely remained an individual choice. If educational institutions would like to maximize the participation of its staff members in OER production and sharing, they would have to consider instituting some mechanisms (e.g., incentives, inclusion in performance appraisal) to elicit people's involvement.

For OER to flourish beyond UPOU though, universities and other educational institutions in the country must be more involved in its creation and consumption. As knowledge producers, universities are in the best position to promote its cause. Universities, the government, and the private sector must collaborate to create a culture of using OER for open and lifelong learning. For this to materialize, universities need to take the lead by looking at OER beyond their economic value or cost savings, but also their important role in promoting active learning and addressing issues of equity in education.







## CHAPTER 9

### A Sub-discourse on Virtual Clinical Experience Courseware: Opening Access

Sheila R. Bonito

#### **CONTEXT**

Distance education in nursing faces certain challenges, especially since it requires personal qualities and technical skills considered to be learned mostly through face-to-face interaction (Chaffin & Maddux, 2004). Students need to learn competencies in new learning methods, computer-assisted learning and technology in education (Bonnel, et al., 2005; Cooper, et al., 2004). Realizing the need to give nursing students more support in learning content and technology, a multimedia courseware in nursing was developed from 2010-2012, putting together resources that will enrich the clinical experience of students in a distance-learning environment. It also aimed to provide opportunities for nursing students to maximize the learning potentials during clinical practicum by empowering them through new learning methods, computer-assisted learning and education technologies. This project supports Herrington's and Oliver's (2000) assertion that computer-based representations do provide a powerful and acceptable vehicle for the critical characteristics of the traditional apprenticeship and cited many researchers reporting that the computer can provide an alternative to the real-life setting. With funding from the International Development Research Centre (IDRC),

this multimedia courseware, “Virtual Clinical Experience in Nursing,” was developed as an OER and became part of the regional project, “Openness and Quality in Asian Distance Education”.

This paper was presented during the 6th Round Table Discussion called “The Openness of the Open University” with a special focus on “Open Educational Resources” held on 12 March 2013 at the UP Open University (UPOU). The goal of the discussion was to thresh out the issues surrounding the development and implementation of Open Educational Resources (OER). The concept of OER at UPOU was fairly new and the process of developing a multimedia courseware and offering it as an OER even more so.

The narrative explains the rationale for the development of the courseware and describes its features and steps in the development of content, discusses the evaluation of the use of the courseware and the implications of opening access through OER. Then the conversation that followed the presentation discussed issues on OER, dissected open access, and envisioned ways forward.

## **NARRATIVE**

### **The Virtual Clinical Experience Courseware in Nursing**

The project started in 2010 when the nursing program of UPOU answered IDRC's call for project proposals demonstrating openness and quality in distance education in Asia. We proposed developing a courseware to show how multimedia and distance education technologies can provide access to and quality in distance education in nursing. It was envisioned to be developed as OER and to be a good example of the use of distance education technologies in nursing.

### **Rationale for the development of the courseware**

The goal of the Virtual Clinical Experience (VCE) courseware is to support the students before, during and after their clinical practicum. It aims to prepare the students for the actual clinical practicum by:

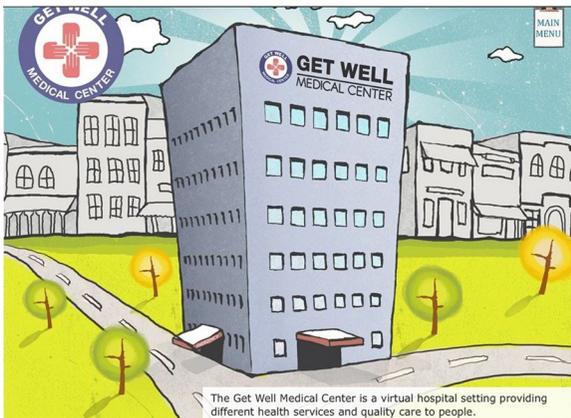
1. Orienting them to the objectives and tasks of the practicum;
2. Providing examples of patient conditions in the hospital setting; and
3. Reviewing concepts needed in the clinical practicum.

The courseware was not meant to replace the actual clinical practicum, but for the students to build up their confidence in preparation for the clinical practicum – to be oriented to the setting, to know what to expect when they actually get to the clinical practicum site, and to anticipate the tasks that would be required of them. It was also a way of standardizing the practice in terms of mentoring students in the clinical practicum, which is one of the main challenges in the nursing program through distance education.

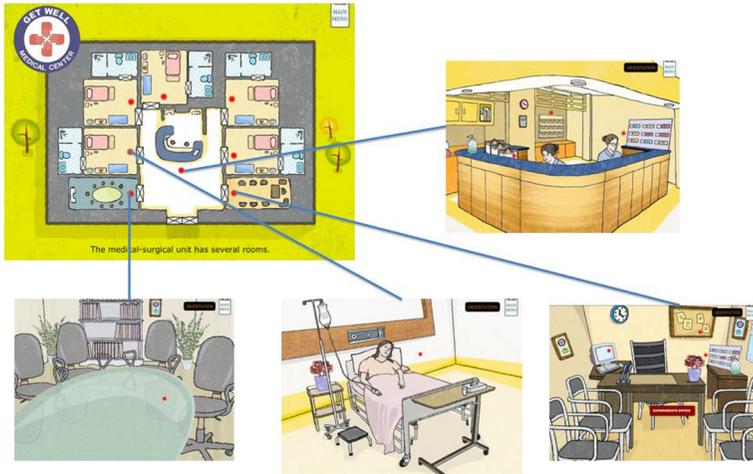
## Features of the courseware

The courseware tried to incorporate many of the elements needed for teaching and learning in the clinical practicum. We made sure that what the students will be shown in the courseware is what they will see in the actual setting. So, a virtual hospital named “Get Well Medical Center” was created, obviously a fictitious one.

“The Get Well Medical Center is a virtual hospital center providing different health services and quality care to people. You will be working in the medical-surgical floor, which is the busiest area in the hospital. The medical-surgical unit has several rooms. Familiarize yourself with the site by clicking on several objects in the area...” (Excerpt from the video introduction)



The courseware has a site map where the virtual hospital has a floor plan and orientation to the different rooms in the hospital. The rooms include: a nurses’ station, a conference room, a supervisor’s room and the patients’ rooms. The rooms were designed after a real hospital. The physical layout was inspired by the layout of rooms at the Philippine General Hospital, which is the training hospital of the University of the Philippines Open University. This is to familiarize students who are coming from different parts of the country and sometimes from abroad to the physical setting as



they proceed to their clinical practicum at this training hospital. The virtual environment shows a snapshot of the room and the equipment/ facilities that are usually in the specific rooms. The students are guided where to go by a “navigation trail” that outlines the tasks needed to be done by students during the clinical practicum. There are “blinking red buttons” scattered around the rooms signaling to students that there are tasks in the room by clicking on these buttons. For example, there is a blinking red button in the patient’s room indicating that the students should conduct nursing history, physical examination and health education.

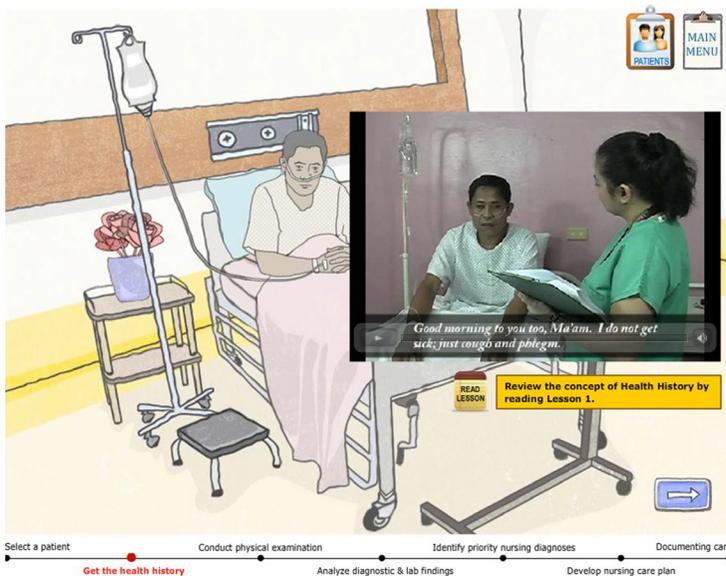
To illustrate better the sequence of tasks to be done by students, a navigation trail is shown which marks where the student is in the performance of the tasks. The sequence of tasks follows the nursing process, which includes the following:

1. Obtaining a complete, accurate and appropriate health history;
2. Performing systematic physical examination;
3. Analyzing assessment findings to derive nursing diagnoses;
4. Formulating a therapeutic nursing care plan;
5. Implementing the nursing care plan; and
6. Evaluating the nursing care plan.

Other elements in the courseware include: video clips, lessons (reading materials) and downloadable templates or forms. The videos feature faculty and staff of the University of the Philippines Manila College of Nursing showing how health and nursing history and physical examination of patients are done. The lessons contain the learning activities that students can try to check in their understanding of the topics covered in the courseware.

### Development of content

The development of the content for the courseware involved several people: content experts, instructional designer, multimedia specialist, graphics artist, teacher and students. The content experts selected the topics that should be part of the courseware. The instructional designer helped the content experts formulate the learning objectives, learning activities and methods for evaluating the learning outcomes. The multimedia specialist worked closely with the instructional designer to envision how the multimedia elements could be used to guide learning. The graphics artist rendered the visual representation of the multimedia elements and



thematic background for the courseware. The teacher and students were involved in the pilot testing of the courseware. It was important for these people to discuss first the requirements of the clinical practicum and to agree on how they should be rendered in the courseware.

The steps in the development of the content of the courseware can be summarized as follows:

1. Determining the objectives of the courseware
2. Identifying the topics for the content
3. Developing the storyboard
4. Designing the learning activities
5. Identifying the multimedia elements
6. Gathering materials for the courseware
7. Developing materials for the courseware

### ***Determining the objectives of the courseware***

It is important that the objectives of the courseware were clear from the start. These were anchored on the objectives of the clinical practicum:

“After going through the clinical practicum, students will be able to:

1. Review principles and concepts in health history,
2. Review principles and concepts in physical examination,
3. Identify nursing diagnoses from data gathered from health history and physical examination,
4. Develop a comprehensive nursing care plan, and
5. Demonstrate skills, knowledge and attitude in the care of clients, specifically in providing self-care assistance, critical care nursing, medication administration, pain management, patient education, rehabilitation and psychosocial care.”

### ***Identifying the topics for the content***

The content was organized around five case studies featuring common patient conditions encountered in adult care setting in the hospital, specifically: chronic heart failure, stroke, breast cancer, chronic obstructive pulmonary disease, and dementia. The topics for the lessons were selected based on what is needed by the students to be able to achieve the learning outcomes of the clinical practicum. These topics were supplemented with teaching and learning activities as well as learning support materials. Teaching and learning activities involve formulation and implementation of a nursing care plan and organizing a learning portfolio that provides evidence about the clinical practicum experience. Learning support materials include additional resources, feedback mechanisms to formative evaluation and templates for case studies, performance checklist, and personal journal. Chunking of the topics was very important to make the courseware manageable.

### ***Developing the storyboard***

The storyboard is the thread that binds the materials in the courseware. It tells the story of how the user is going to navigate the courseware. The visual cues like the site map and the blinking red buttons guide the user to the flow of the content. In the development of the storyboard, it was essential to identify which content should be navigated in linear fashion and which content does not have to be. The nursing process was used as a framework for sequencing the tasks. This also helped guide deciding the flow of the storyboard. The storyboard made it more fun for students to go through the courseware.

### ***Designing the learning activities***

To encourage the students to interact well with the courseware and at the same time test their understanding of the content, learning activities were designed and incorporated into the course material. Some learning

activities just require students to read a document and then answer some quick questions. There are other activities in the courseware such as following external links to find out more about related topics such as diagnostic tests, laboratory tests and drug studies needed for the care of the patient.

### ***Identifying the multimedia elements***

The multimedia elements needed for the courseware were identified after the learning objectives were formulated, the topics were selected and incorporated into the storyboard, and the learning activities were designed. For example, it was deemed important to have videos to demonstrate how certain skills are to be performed, such as taking a health history of a patient and conducting physical examination. Sketches of rooms in the hospital were needed to serve as background for the activities needed in the courseware. Photos of certain things were also needed to illustrate equipment, facilities, things needed in the clinical practicum for the courseware. Simple animations were also designed to improve navigation of the courseware and make the multimedia elements more interesting and engaging.

### ***Gathering materials for the courseware***

Initially, a review of existing OER on clinical practicum in nursing was done. Some of these OER were incorporated into the courseware, such as additional reading materials for the lessons. Certain elements of the courseware had to be developed since most of the materials in the Internet are either copyrighted or not applicable in the country's setting.

### ***Developing materials for the courseware***

Developing materials for the courseware was really difficult for the reason that one needed to involve many players in the development process. It took two years to develop the content and render them into multimedia

courseware.

In terms of developing the materials for the courseware, several steps were followed:

1. Designing the graphics elements
2. Developing multimedia elements
3. Putting together the multimedia elements
4. Post-production

Designing the graphics elements included deciding on the user interface of the courseware, the background design as well as the navigation elements. Developing the multimedia elements included producing the videos and chunking them into shorter clips, and making the animations for improved navigation and increased interactivity in the courseware. Putting together the multimedia elements into the courseware involved organizing the materials into subtopics in the courseware and embedding the video clips, interactive buttons, and active links to resources. Post-production entailed making sure that the parts are assembled neatly in the courseware, that they do work, and that these elements are seen in harmony with each other.

Putting together a distance education course is not a simple process, especially when complex learning is involved. Complex learning aims at the integration of knowledge, skills, and attitudes; the coordination of qualitatively different constituent skills; and the transfer of what is learned to daily life or work settings (Van Merriënboer, Kirschner, and Kester 2003). The clinical nursing practicum requires complex learning since this is the time for integrating and applying concepts learned. Given the many tasks and information that the student needs to learn in the courseware, it was important to ensure optimization of cognitive load in the design. To address this, the Cognitive Load Theory (Paas, Renkl, & Sweller 2003) was used in putting together the courseware to ensure that student users will (1) manage tasks more effectively, (2) reduce the time

spent on unnecessary steps in understanding concepts, and (3) focus on learning and demonstrating competencies needed by the course.

### **Evaluation of the courseware**

The courseware was pilot-tested in one of the courses in nursing that require clinical practicum. The objectives of the evaluation were: (1) to determine the usefulness of the courseware in terms of ease of use (navigation), attractiveness of design, functionality, and efficiency; and (2) to describe what makes the courseware useful to students.

Students enrolled in a major nursing course were asked to answer survey questions based on the Usefulness Model, a 35-item test on the usefulness of the courseware. Students were asked to rate the courseware from 1 (least) to 5 (most) in terms of: ease of navigation, attractiveness of design, functionality, and efficiency. There was also an open-ended question asking students, “What makes a courseware usable, functional, efficient?”

Results showed that in terms of usefulness of the courseware, its functionality was rated highest at 4.43, followed by attractiveness of design at 4.11, then efficiency (4.00) and lastly ease of navigation at 3.88. Since the rating for the ease of navigation of the courseware was the lowest, there was a need to improve the navigation elements. Navigation trails and arrows were added to the courseware and an overview of the course (outline) was also added.

<b>Usefulness of courseware</b>	<b>Mean (SD)</b>
Ease of navigation	3.88 (0.14)
Attractiveness of design	4.11 (0.13)
Functionality	4.43 (0.09)
Efficiency	4.00 (0.02)

<b>Student's reasons for usefulness of courseware</b>
Guides and illustrates what to do during the clinical practicum
Provides information about the scope and processes of the practicum
Details the process of assessing the patient, reviewing laboratory and diagnostic tests, and preparing drug studies
Stimulates critical thinking and decision-making
Improves interaction with patients

It was also interesting to find out what the students were thinking and feeling when they were using the courseware and whether it was at all useful to them. Many of the students stated that the reason for the usefulness of the courseware was that it guided them and illustrated to them what to do actually in the clinical practicum before they even go to the setting. It provided information about the scope and the processes of the practicum. It detailed the process of assessing the patient, reviewing laboratory diagnostic test, and preparing their studies. It stimulated critical thinking and decision-making, and it improved their interaction with the patients.

<b>Students' reasons for satisfaction with the courseware:</b>
Real-life case scenarios
Complete and rich information about the cases
Various multimedia formats used (flash animations, videos, interactive texts)
Authentic learning activities and resources

Students' satisfaction with the courseware was based mostly on the real life case scenarios used in the courseware. They were given case scenarios taken from actual patients whose personal details were concealed, but actual conditions, interventions, nursing care needed were shown. All these contributed to an authentic learning experience.

The complete and rich information about the cases gave them an example of what they should be expecting when they are in the hospital setting for their actual clinical practicum. They were also satisfied with the use of various multimedia formats and with the authentic learning activities and resources.

### **Opening access through OER**

Here are some questions for discussion about opening access through OER. These are the questions that we (the courseware developers) have been asking ourselves, and, which, I think, we (as a community of teachers and researchers at UPOU) have to discuss some more.

- Why package the courseware as OER?
- What are the steps for packaging the courseware as OER?
- How to document the use of the courseware as OER?
- What to expect in opening access to VCE?

### ***Why package this courseware as an OER?***

The courseware was meant to showcase the use of distance education technologies in nursing. By making the courseware an OER, it is hoped that many nursing schools would benefit from its use. The courseware can help nurse educators mentor students in the clinical practicum. The courseware can help students anticipate what is going to happen in the clinical practicum. The courseware can be unpacked and its various elements used as needed. The need for innovative teaching and learning strategies is imperative in the changing landscape of nursing education. The use of ICT in teaching and learning in nursing schools has the potential implication of widening access to quality materials in nursing which are both relevant to the local context and at the same time at par with global standards.

### ***What are the steps for packaging the courseware as OER?***

Making the courseware an OER means considering what type of license should be adopted to open access to the material. This also means reviewing the intellectual property rights policies of the University. Is this the beginning for the University to produce OER, either print or multimedia materials? Considering the cost of the development of the courseware, how can the University sustain the development of multimedia materials?

### ***How to document the use of the courseware as OER?***

Should we document how this courseware as an OER is going to be used? What can we learn from this? How can we document the use of the courseware as an OER? These are some of the questions that merit some reflection. It is possible that nursing schools which will be interested in using the courseware could be asked to conduct an evaluation of the courseware. Ideas for future projects may come from these evaluations. The courseware has already been presented in two conferences. The first presentation was during the Asian Association of Open Universities Conference in 2011 in Wawasan Open University, Penang, Malaysia (Bonito, 2011). The paper highlighted the use of Cognitive Load Theory in the development of the courseware. The courseware was again presented during the Philippine Nurses Association Annual Convention in 2012, this time showing how the courseware could help mentor students and improve the conduct of clinical practicum (Bonito, 2012).

### ***What to expect in opening access to the courseware?***

When I was asked to present again the courseware in this RTD, I did not hesitate to say yes to an opportunity to discuss the future of developing multimedia courseware (and other materials) as OER. This is a direction that the University might consider given that we have the means and the potential capacity to develop print and multimedia course materials.

## CONVERSATION

**Larry Cruz:** What is the cost of developing the courseware?

**Author's response:** The cost could be broken down into honoraria of personnel and the MOOE in the development of the content and technology used in the courseware. The personnel involved in the courseware are composed of the content experts (subject matter experts), instructional designer, multimedia specialist, and project assistants. The honoraria rates were based on the rates we give at UPOU. The other major costs are from the development of the video materials, which include payment for talents for the narration and acting in the scenes and costs of filming on location. The budget for the videos was Php 65,000 each. This is relatively cheap since the filming was done at the UP College of Nursing and talents were also some of their faculty and staff members as well as from the UP Open University. They were actually happy to be part of the courseware and were just given tokens of appreciation for their parts. So I think that is also in the spirit of OER. We do not want to produce expensive coursewares, but make it is a learning experience for everybody.

**What is the stand of UPOU on OER and MOOCs? (Grace Alfonso):** Maybe we can now think about what our university stands for, to guide us along on how we should look at OERs. What does it mean being an Open University? We are to help provide greater access to having quality education. We are reaching around 3000 students every year. Hopefully we can reach more. We are around to be able to encourage other academics (who are connected with UP) to help us out in doing our work. For example, we were originally created to tap into UP talents and UP academics to help us produce course modules. We are here to help in improving higher education in the country, making sure that we inform them what is OER and that we can sway them to go in the direction that we feel is best for the country. We are doing our work in the university not only for the general higher education but also to make sure that we strengthen the Filipino workforce.

Now, there are mega universities, where they have 200,000 to 3M students. They would probably look at UPOU – an open university but with only 3000 students. Being part of the UP system, we do have some constraints, but we can really look seriously at our being open, our contribution to openness. Education should be free, research should be free, knowledge should be free, so that universities can help in social transformations. We may not be able to get a 200,000 student enrolment overnight, but we can share 2 million of free materials - original text coming from Filipino scholars.

We have to consider where to get the funds for developing these free course materials. Aside from external funds that support creation of OER, the University can also fund some of them. We also have to think of distribution. We have MODeL (Massive Open and Distance e-Learning), our own version of delivering MOOCs (Massive Open Online Courses) which can distribute free materials and give free access to courses to students.

We do have some questions to answer and questions that we should ask ourselves as educators. Do I want to get involved in this? Do I want to contribute to this? Does this go with my vision? Am I willing to give my work for free and distribute to more students as a course in MODeL?

***What do we need in developing OER? (Grace Alfonso):*** We need a good team. We need people who are trained in developing multimedia elements. We need instructional designers.

***Consuelo Habito:*** Faculty members should be exposed to opportunities and possibilities of developing multimedia materials. We may have or we may be the content experts, but we need to think through the multimedia elements. And we need to know which parts of the course could be supplemented with multimedia.

**Author's response:** It is one thing to know the content and another to render it in multimedia. You might think, "I have this idea, I can easily do it." Actually, no, it is not easy. You need collaboration. You cannot just sit alone and imagine. It is very useful to have a team with whom you can bounce off an idea. You may be the content expert, but you need the instructional designer to think through what should be the learning outcomes and how could these be achieved. You need the multimedia specialist to tell you that the behavior of this multimedia element can help a student learn better. You need a graphics designer to think through the graphic elements in order to make the courseware attractive. We really need time to sit, write the storyboard and plan how to put all the elements together.

**Grace Alfonso:** Faculty members who are interested can also be trained, if they themselves can be their own instructional designer, or multimedia specialist (because they are interested in knowing how to do animation).

**Author's response:** Do we have the capacity to really develop content? I think we do have the potential, but it really takes a lot of time to come up with a product. We thought that we will actually be doing this in a years' time, but it was difficult for the reason that you really need to gather or develop your own materials and ensure that it is copyright-free and to involve all the other players before you can develop the content. It took us one and a half years to develop the content and multimedia elements, and another year to put them all together and pilot test the courseware.

**Patricia Arinto:** The discussion so far has something to do with the development of multimedia materials. But OER encompasses instructional materials in all media formats, including text. We already have course materials in print. Are we willing to make them freely available? Free is not necessarily open. There are four Rs in OERs: Reuse, Revision, Remixing and Redistribution. With OER, I can take something you did and change it and then relicense it. We need to figure out our position with respect to opening up, putting our materials online, and not charging instructional

materials fees. If we can make this first step — that’s an important first step — then we can think about the next levels, including licensing. We also have to be careful what type of license to apply considering the adoption of other materials and the type of license they carry. If we are not careful we may package a course material as OER and license it as CC-SA when it contains materials that have more restricted licensing. Deciding to make course materials available is easy. The real issue is how to ensure openness.

**On Discussing level of openness (Primo Garcia):** There is really a need to discuss the level of openness that we want to pursue. This has implications on the materials that we are trying to produce and in what way are we going to create them. If we want the materials, reusable, re-mixable, etc, then we have to think of ways that the users will be able to disaggregate them and use them for the context they want and repurpose in which they will be using it. There are materials that are quite difficult to disaggregate. We have to think of the policy framework to ensure these resources make sense in the context of a learning situation. For instance, when we open our resources, we open them within learning situation. How do we put these resources in massive online courses, so that people would be able to use these resources as well?

**Grace Alfonso:** As a teacher or researcher, I can share my products whether they are photographs or research results as long as there are no violation on copyrights and permissions. For example, a photograph I have taken can be reused and placed in another context. That is the spirit of OER.

**Jean Saludadez:** Why do we need institutional position or policy for me to share what I have been using in my courses or even in my research? We can do that individually. We do not really have to wait for the university to make a stand whether we are for OER - I’m sure we are supporting

OER - or for a policy or official announcement that we can make our course materials OER. I don't know if we need to wait for that institutional pronouncement.

**Author's response:** I do think there is a need for institutional policy or guidelines about OER. Even though we are doing it, we share our work and so on, we will still benefit more faculty members if we have some direction, for example, what types of materials to be developed as OER, what types of license to adopt, where to share them, etc. As an institution, we will be more strategic; and then we can address all the other issues that OER will open. When we start producing OER we will have more issues that we have to face. And so, if we do not plan for those policies, guidelines, we might have more problems because we're opening up literally to the world. We have to discuss what policy or guidelines will be needed in terms of creating OER, licensing OER, and distributing OER.

**Patricia Arinto:** It is not just a matter of individual willingness. We are and we may be open already in our practices. But this goes beyond individual willingness. First of all, our work is made for an institution, so it is not ours and we are not free to distribute it as we like without getting institutional permission. That is what the IPR framework of UP is all about. If you signed a contract with UP for writing course materials, the copyright belongs to UP. So there has to be institutional mechanisms for licensing OER.

Producing OER is one thing. The more difficult aspect is how to utilize and distribute them. Also, OER refers to resources. Aside from that, we have to look at the more general context of open practice. How open are we? What do you actually do to make it available to others? How do you use it? It is not enough that the materials are just out there in the open.

## **POSTSCRIPT AND REFLECTION**

This RTD was to discuss the issues surrounding the development and implementation of Open Educational Resources (OERs). The presentation on the Virtual Clinical Courseware in Nursing presented the process and challenges in developing a multimedia material and opening it as OER for use in nursing education as a supplementary material to teaching and mentoring clinical practicum of graduate students. The development of the courseware was challenging given that there is no OER on conducting clinical practicum for students that fits the context of a developing country like the Philippines. The courseware had to be developed from scratch and had to make use of authentic learning and authentic assessment. The lessons from the development of the content include the need for a close collaboration between and among content experts, instructional designer, multimedia specialist, graphics artist, teacher and students. There is also a need to maximize the use of existing resources and engaging volunteers in the development of the courseware to minimize the cost of paying for talents and arranging locations for filming. Putting together the courseware also needed understanding and applying the Cognitive Load Theory to address the intrinsic, extraneous and germane cognitive load of the materials and ensure that the content experts, instructional designers and multimedia specialists work together to achieve an engaging courseware that will address directly the needs of the students and help achieve the objectives of the course.

The presentation also posed questions that generated more discussions on OER and open access at UPOU. These questions include reflecting on why the need for OER, what are needed in packaging materials as OER, and the implications of doing OER.

The courseware was meant to showcase the use of distance education technologies in nursing and share it with nursing schools to help nurse educators mentor students in the clinical practicum. The use of ICT in teaching and learning in nursing schools has the potential implication of

widening access to quality materials in nursing. Making the courseware an OER means considering the IPR and copyright-free licenses.

The discussion generated on the floor revolved around the rationale for doing OER, cost of production, requirements for doing OER, implications of doing OER including levels of openness. Producing OER was considered hand-in-hand with the UPOU's mandate to support life-long learning and widen access to quality education. There were suggestions to do more training programs to develop the potentials of faculty and staff to create multimedia materials. There was an emphasis on the use of existing resources and local talents for video production. External and internal funding was also identified as possible sources of funds for projects in developing OER. Further implications of use and development of OER include looking into a faculty member's willingness to share his/her work for free, existing University's policy on IPR, level of openness of materials in terms of adopting copyright-free licenses, and, in turn, examining the impact of these to open education practice at the UPOU.

Since the RTD, there have been several developments on OER in the UPOU. In May, 2014, it crafted its policy on OER, which states, "Recognizing the importance of OER in providing access to quality materials and technologies, the UPOU will:

1. Promote the use of OER in support of quality teaching and learning,
2. Support the creation of OER,
3. Establish an open licensing framework,
4. Contribute to the sharing of OER globally, and
5. Integrate the OER values and processes in institutional policies and systems."

The use of OER in the UP Open University has been promoted in the development of course materials. Training programs for course authors include OER to encourage the use of OER in writing the course modules. Faculty-in-charge of courses are also encouraged to use OER materials for teaching and learning.

Supporting the creation of OER was also made possible by creating an OER repository in the Faculty Portal website. This is where course authors and faculty-in-charge can look for free materials relevant to their courses. Special grants for development of multimedia supplements as OER were also made available.

Discussion on establishing an open licensing framework has already started identifying the issues and needed guidelines on choosing type of license for educational resources produced by the University.

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## CHAPTER 10

### Openness in UP Open University: Institutional Reflections and Implications

Melinda F. Lumanta  
Alexander G. Flor

The UP Open University (UPOU) having been established more than two decades ago and being the premier online higher educational institution in Southeast Asia still wrestle with internal tensions, contradictions, and cognitive dissonance as we engage in open and distance e-learning (ODEL). With the enactment of Republic Act 10650, the Open Distance Learning Act, higher educational institutions (HEIs) all over the country are expected to go through the same academic pursuits. To shorten and flatten the learning curve, we attempted to capture our internal ODeL discourse between the two covers of this book to share the UPOU experience with our colleagues from other HEIs who will be treading the same path.

This we did through the *discourse capture* approach. *Discourse capture* as a process and as a product can be done both at the sub- and the supra-levels. In this chapter we shall attempt a meta-synthesis of the sub-discourse reflections presented in earlier chapters that eventually shaped the UPOU community's supra-discourse. This approach offers a unique method of eliciting constructs formed from sub-discourses of thought leaders in a certain community, in this case, a community of mentors, educators, and researchers openly sharing and discussing a topic - the openness of UPOU.

The concept of openness has been extensively discussed in the literature and various fora (Wiley, 2009; Wiley & Hilton, 2009; Peter & Deimann, 2013; Siemens, 2013; McGreal, Anderson & Conrad, 2015; Mishwa & Kanwar, 2015; Daniel. S.J., 2016; Tait, 2016) revolving around open education, open admission, open curricula, open educational resources (OER), massive open online courses (MOOCs) and quality assurance, among others. In a recent policy report of the European Commission, *Opening up Education: A support framework for higher education institutions* (dos Santos, Punie, & Castaño-Muñoz, 2016) two types of dimensions of openness surfaced - *core dimensions* and *transversal dimensions*. According to dos Santos et al. (2016), there are 10 dimensions as to the extent an education institution is considered 'open'. *Core dimensions* are the embedded practices that provide the 'what of opening up education' such as, access, content, recognition, pedagogy, collaboration, and research. The *transversal dimensions*, are practices that serve as the 'backbone' such as leadership, strategy, technology, and quality. This typology of "openness" dimensions work and interact together in characterizing the openness of an institution.

In the framework, dos Santos et al. (2016), defined the core dimensions as follows: Access as the "removal or lowering of economic, technological, geographical and institutional barriers which obstruct the doorway to knowledge. It grants permission to learners to engage with educational content, courses, programmes, communities of practice, networks and other types of knowledge sharing environments, media and activities in formal and non-formal education." *Content* refers to the "materials for teaching and learning, and research outputs, which are free of charge and available to all." *Pedagogy* refers to "the use of technologies to broaden pedagogical approaches and make the range of teaching and learning practices more transparent, shareable and visible." Moreover, *Recognition* may refer to: "a) the process, usually carried out by an accredited institution, of issuing a certificate, diploma or title which has formal value; b) the process of formally acknowledging and accepting credentials, such as a badge, a certificate, a diploma or title issued by

a third-party institution.” *Collaboration* is about “connecting individuals and institutions by facilitating the exchange of practices and resources with a view to improving education.” Finally, *Research* “is about removing barriers to access to data and research outputs, and also about broadening participation in research.”

*Transversal dimensions* were defined as follows: *Leadership* is “the promotion of sustainable open education activities and initiatives ... paving the way to creating more openness by inspiring and empowering people.” *Strategy* “is about defining the values, the commitments, the opportunities, the resources and the capabilities of a HE institution with respect to opening up education.” *Technology* refers to “technological infrastructures and software which facilitate opening up education in its different dimensions.” Quality refers “to the convergence of the 5 concepts of quality (efficacy, impact, availability, accuracy, and excellence) with an institution’s open education offer and opportunities.” (pp.24-29).

In this chapter, we initiate an institutional reflection phase in the supra-level discourse by first focusing on the “contexts” specified in the sub-discourses and categorizing these under the core dimensions using the above framework. The main thoughts in these sub-discourses are captured as “context” which provide the basis for a synthesized “reflection” at the institutional level. It is worth noting that as early as five years ago, UPOU set out to engage in an academic discussion of how it perceived its degree of openness by identifying the most salient issues confronting an open university. It is comforting to know that five years hence these are the same concerns considered in a framework intended to organize the way we view openness of an educational institution.

For instance, the articles by Ricardo T. Bagarinao, Marie-Sol P. Hidalgo, and Cesar Z. Luna which centered on open admission, open curricula, and multiple exits and entrances respectively, could be classified under the access dimension; the article on open educational resources by Garcia et al. falls under the content dimension; Patricia B. Arinto’s and Roel P.

Cantada's article on pedagogical models of open and distance e-learning reflect the pedagogy dimension of openness; the recognition dimension was tackled in the article of Maria Mercedes E. Arzadon on accreditation of prior learning; Alexander G. Flor situated UPOU's experience within a shared teaching-learning environment which falls under the collaboration dimension; and lastly, the research dimension of openness was exemplified in the article by Sheila S. Bonito on the development and evaluation of an open courseware.

The thought leaders in these sub-discourses raised access and flexibility questions. These relate to: possibilities of opening up admission in the context of a highly selective UP admission process; of allowing the widest option for learners to determine their own program of study by considering a continuum of possible entrances and exits including an option of starting with one's research which is traditionally considered as a capstone requirement ; and of exploring a redefinition of curriculum as a codified form of knowledge for communities of practice amidst the tension of academics as gatekeepers of tradition and as explorers of ways to bring about social transformation through education.

Adhering to the conviction that the university is the source of knowledge, the thought leaders critically examined content creation and dissemination of OER in an open and distance e-learning institution. The experience in developing such an OER course material was shared as a result of a research. Through these sub-discourses, openness was conceptualized as giving greater access to quality education through a discussion on content-related and knowledge-sharing issues that an open university should seriously consider.

Likewise, thought leaders tackled issues relating to open and distance e-learning pedagogical models that could enhance learning. Recognizing the differences among learners, the discussions were centered on possibilities of adopting self-paced or independent learning approaches alongside the then emerging open online courses that were offered as

free courses, thereby, increasing openness through accessibility.

Greater flexibility through open and distance e-learning was at the center of discussion as well. In addition to openness in admission and curricula, the idea of recognizing prior learning was presented as being premised on the idea that those who come to open universities carry with them a wealth of knowledge and experiences. In the context of open and distance e-learning, the issue on how previous learning could be accredited towards a degree was considered. At the course level, flexibility in terms of a truly collaborative engagement between teacher and learner was explored by proposing the idea that in an online environment the role of the traditional teacher diminishes and that perhaps online educators could be effective while being minimally invasive of the student's learning space.

As earlier mentioned, this chapter shall attempt to provide a supra-level reflection that should lead to institutional implications. Based on the individual sub-discourse reflections which intended to bring to the present the issues presented as "context" and discussed in 2012, the institutional reflection hopes to make sense of current realities embodied in a collective institutional vision.

Sometime in 2016, UPOU developed its Strategic Plan where it succinctly captured the mantra, "pamantasang bukas para sa magandang bukas". In Filipino language, the term "bukas" (used twice in this phrase) means both "open" and "tomorrow" (or "future"). This play of words highlights the idea that openness is at the core of education in the future and UPOU is mandated to take that lead in the country and in the region. In recognition of this, the Philippines passed R.A. 10650, known as the Open Distance Learning Act, which gives UPOU the mandate to help upgrade the quality of Philippine education through open and distance education.

In efforts to derive the collective thought on various openness dimensions, the discourse capture approach allowed the thought leaders to present their own reflections as to implications of openness in the present time

premised on the context, the narrative and ensuing conversation that went on in 2012.

At the supra-level, we look back on these reflections and superimpose them on a collectively designed strategic plan of the university. Consistent with its thrust as an open university, UPOU's strategic plan reflects the university's direction of "opening" up academic and administrative functions of the institution. Hence, several of its flagship programs are geared towards ensuring some form of openness in its academic and administrative operations and practices.

In the academic realm, we observe that the sub-discourse reflections generally mirror the identified strategic thrusts of the university as codified in its 2016-2019 Strategic Plan which include, among others, the following: inclusive, flexible, and innovative teaching and learning; responsive and socially relevant research and innovation; public service in ODeL; and quality assurance in ODeL. As is apparent, the current strategic direction of UPOU somehow anchors on the various core dimensions of openness.

For instance, UPOU's strategic plan calls for promotion of UPOU programs in all regions and provinces; expansion of scholarships and financial assistance, developing bridge programs for readiness for distance learning; universal accessibility of courses and materials; review of admissions policy and enhanced student support. In the sub-discourses the reflection on open admission and open curricula are suggestive of the access dimension. Also, UPOU's aspiration of providing multimodal course delivery, multiple entrances to and exits from UPOU's programs and recognition and accreditation of prior learning as articulated in its future plans are indicative of flexibility afforded by openness.

With the crafting of a UPOU OER policy, the university's capacity to produce and make these OER teaching materials available under a creative commons license is expected to be enhanced. Moreover, with the creation and use of the UPOU Networks as a repository of OER materials

accessible online, UPOU concretizes its commitment to widening access to its OER materials thereby exhibiting greater openness in the content dimension.

UPOU's goal of promoting, adopting and adapting innovative teaching methodologies in support of effective learning driven by technology is reflective of openness in the pedagogy dimension. In fact, UPOU has recently approved the pilot run of an independent learning track. Such move away from a cohort-based notion of program delivery is suggestive of a more flexible approach to teaching and learning. Its initiatives in the development and delivery of open online courses (OOCs) as alternative pedagogical models have been more vigorously pursued in recent years. UPOU has seriously addressed not only the development of MOOCs but its assessment as well for purposes of crediting these towards degree programs. Guidelines in developing and assessing MOOCs are being crafted with the aim of establishing standards for a UPOU brand.

It is interesting to note that while the various sub-discourse reflections could be characterized as both circumspect and dauntless at the same time, the overall tone of the university's collective vision is one of forging ahead to explore new grounds while remaining relevant and sustainable in an ever changing educational terrain. Owing to its agile and responsive nature mainly "arising from its being mean and lean; in tune with the times, if not ahead of its time; a community of scholars continuously enriching theory and practice of open and distance e-learning" (Lumanta, 2014), UPOU is expected to attain its vision of "pamantasan bukas para sa magandang bukas" hastened by a certain level of institutional agility. Organizational agility is generally defined as the institution's capability to "sense the need for change from both internal and external sources, carry out those changes routinely, and sustain above-average performance" (Worley and Lawler, 2010, p. 194). Worley and Lawler (2010) proposed a model of agility and performance identifying robust strategy; adaptable organization design; leadership and identity, and value-creating capabilities which in turn lead to sustained performance.

We note that in this book the transversal dimensions (leadership, strategy, technology and quality) were only superficially touched upon as these were not topics in the original roundtable discussion. However, since the discourse on openness is continuing, these dimensions should be taken into account as UPOU strives for greater openness in the future. To paraphrase dos Santos et al. (2016), the discourse on leadership, strategy, technology and quality is shaped by the discourse on access, content, research, collaboration, pedagogy and recognition. The transversal dimensions interact intimately with the core dimensions.

As we bring the discourse to the institutional level, we reflect on the “openness” trajectory that UPOU should pursue in the future guided by a framework that brings in an important institutional character - that of agility. Needless to say, UPOU’s robust strategy its responsive and flexible ODeL organization, culture and identity, ODeL leadership and its value-creating capabilities such as change, learning, and innovation as an academic institution are existing pre-requisites to sustained performance as a truly open and distance e-learning (ODeL) institution.





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**Virtual Clinical Experience Courseware: Opening Access**

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## **Openness in UP Open University: Institutional Reflections and Implications**

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## ABOUT THE COVER

The cover of this book represents the exchange and cycle of discourses among different people across the globe, sharing knowledge and ideas, via open and distance e-learning.

The elements such as the speech bubbles represent the discourses while the lines with arrow that point from one speech bubble to another describe the cycle and exchange of these discourses. The world icon shows that this cycle and exchange of discourses are being shared by individuals (represented by the avatar icons) coming from different fields of expertise with the goal of sharing knowledge with one another, as represented by the light bulb placed at the center.

