JODDE Journal of Open, Distance, and Digital Education

Johnson, K. R. (2024). Oral history: In conversation with Tony Bates. *Journal of Open, Distance, and Digital Education, 1*(1), 1-8. https://doi.org/10.25619/va08c930

Received: 01 January 2024 | Revised: 02 February 2024 | Accepted: 03 March 2024

Oral Histories and Engaged Perspectives: In Conversation With Tony Bates

Kathryn R. Johnson[1]

[1] Northern Michigan University, USA

Correspondence:
Kathryn R. Johnson| e-mail: kathryjo@nmu.edu

Abstract

Dr. Tony Bates is retiring in 2024 after his extensive experience working in distance education. He worked at the Open University in the United Kingdom from 1969 to 1989, followed by positions at the Open Learning Agency of British Columbia, the University of British Columbia, and the Universidad Oberta de Catalonia in Spain. He also ran a consultancy firm in Canada that took him around the world. Dr. Bates has published eleven books and multiple articles. His website, https://www.tonybates.ca/, contains a wealth of resources, including excerpts of his memoirs with the more personal stories and photographs from his professional experiences and travels. This interview offers his insights on some of his projects and trends he has observed in the field of open, distance, and digital education.

Keywords

open universities, neoliberalism, Canadian Digital Learning Research Association, conferences, digital learning

Kathryn R. Johnson (KJ):

You worked at the Open University in the UK from 1969 to 1989. How did the political, economic and social circumstances shape the OU during your time there?

Tony Bates (TB):

When the OU was started, only 8% of students went on from high school to university in Britain. Even teachers went to teacher training colleges, but they didn't get a degree. There was a pent-up demand from adult learners for further qualifications and higher education. Harold Wilson and the moderate-left Labour Party felt that the higher education system was not serving the vast majority of people in Britain. The Open University tried to resolve that issue. It was definitely a political movement by the government of the time. Jenny Lee, who was critical in getting the University started, used all the heft as the Minister for the Arts and drove it through the House of Commons.

Existing institutions also supported it and did not see it as a threat because only 8% were going on to a university from high school. Therefore, the existing universities still had the pick of the crop. The new institution took a bit of pressure off them.

The Open University was a product of its time because there had been some earlier developments in adult education. The National Extension College, which did not grant credit, offered programs in topics such as English as a second language. Chuck Wedemeyer, of the University of Wisconsin Extension Division, significantly influenced the design of the Open University. He was one of the leading intellectuals writing about the importance of distance education at the time and he ran a very successful extension program at the University of Wisconsin before the British university started.

KJ:

Were you there at the origins of the Open University?

TB:

The University received its Royal Charter in April, 1969. I was appointed as a contract researcher in September of 1969. I was number 20 on the staff, but I wasn't core staff. I was there to inform the university of prior research in open and distance education. Two of us were hired. They only had one position, which they offered to Naomi McIntosh, and then decided because the OU was very new and had a bit of money spare at the time, to hire me as well. Naomi and I spent the first year and a half conducting research on the students' responses to the National Extension College programs.

My research interest in media developed because I noticed that students' responses to the broadcasts were quite different from their responses to the print material. The Open University was spending 20% of its budget paying the BBC to create television and radio programs. I persuaded Walter Perry, the Vice Chancellor at the time, that we should evaluate these programs and see what students actually learn from them. I kind of invented the job for myself.

KJ:

How did your years at the OU shape the trajectory of your career and your research interests?

TB:

I got into the study of broadcast media, because it was such a big part of the university's operation. The BBC has its own culture and considers itself the world's premier broadcaster. And here was this young, unknown researcher writing reports saying the students aren't learning anything from their programs. That didn't go down very well, but it was very interesting at the

same time, because there were two cultures – broadcasting and learning. We investigated what students were actually learning from these programs. Over time, the producers became much more interested in this research because they realized they could improve the programs by understanding how students were responding to the programs. They would often be thoughtful, calm, and logical in criticizing the printed material if it wasn't clear. The students had a much more emotional response to the broadcasts.

One of the things we learned is that there is a skill in learning from television, particularly learning from documentary programs. Most of the programs weren't lectures. The BBC didn't like talking heads just giving a lecture, quite rightly, because it wasn't exploiting the medium properly. Most students at that time didn't know how to "read" a documentary program in an academic sense. They just saw it as icing on the cake, not really telling them what they had to learn, because it wasn't direct teaching. When we remade the Social Science Foundations course, the presenter, Stuart Hall, started off with more didactic programs. The professor was talking and explaining video clips, and then gradually introduced them to a documentary approach throughout the whole course. The students learned much better with that process. Each medium has its own kind of literacy level required for the students to get the most out of it.

KJ:

Were you involved with or have any knowledge of the OU's efforts to break into the American higher education market during the early and mid-1970s?

TB:

I was aware of it, and sceptical about it at the time because the higher education system in the United States is completely different from the higher education system in the UK, certainly at the time. The UK is a small, compact country and the OU could cover the country without any problem. The US is quite different. There are problems getting each state's authorization, the culture also is entirely different, and the Americans had much more access to higher education in those days than people in Britain.

There was a wider range of institutions available and more support for students to go to university in the US at the time. For example, there are public and private universities, elite universities, and state universities. Some institutions were involved in adult education, like the University of Wisconsin Extension, or the University of Chicago, which was using television for adult education.

The OU struggled in that market for those reasons. It was also somewhat arrogant. The North American operation assumed that the world would fall at its feet and it didn't.

KJ:

You mentioned in a podcast interview with Mark Nichols that Thatcherism (her time in office) was coming to an end when you left the UK for Canada in 1989. How did neoliberalism shape the Open University?

TB:

Did I say that? I thought it was at its peak when I left (sarcastic laugh). I couldn't see it ever ending, and it hasn't really. It's gone on for the last 40-50 years in one form or another. Certainly, in the UK, even when there was a Labour government with Tony Blair, it was still a pretty neoliberal approach.

It was very interesting because the Conservative Party in Britain went through a radical change. It was previously the party of the ruling elite in Britain. Then Mrs. Thatcher took a small business mindset to the government; everything was about turning a profit, return on investments, the

private sector can always do things better than the public sector, etc. That seriously undermined the Open University at the time and it has been undermining it ever since.

Students in Britain now pay quite heavy tuition fees, even at the Open University. I think they're the same now as for a regular university. That openness has very much been affected by the neoliberal policy. In the early days of the university, Mrs. Thatcher thought the Open University was a good way for people to pull themselves up by their boot laces. Although everybody thought she would shut it down, but she didn't. She actually supported the idea of people working to make themselves better and that everybody should have an equal opportunity to do the best for themselves, which was much more like the Reagan mindset in the States at the same time. So, in that way, the OU was fortunate it survived that early part. But in more recent years, the idea became that if you want a higher education, then it's a personal investment and you should pay for that out of your own pocket. The state should not subsidize it. That view is now pretty strong in Britain.

KJ:

Do those same neoliberal trends apply to other regions of the world that you've consulted with?

TB:

Well, it's certainly here in North America. It's like a gradual cycle. There are times when people see education as a public good. There's a fight between who's in power as to how much it's a public good versus the 'investment in business training' concept of higher education. But I think at the moment, it's more the neoliberal view. That's sad for a number of reasons. The importance of higher education isn't so much to provide employers with trained labor, but to allow individuals to survive in a rapidly changing world. That is more of a public good, because jobs or even entire careers can disappear overnight. We need a flexible workforce and focusing too much on immediate economic benefits, I think, is too short term of a view. Now, I'm not saying that universities couldn't improve their curricula to make it more relevant. Yes, they could. But that would mean teaching soft skills and intellectual skills like critical thinking more explicitly than they do at the moment. Doing so empowers the students to create new jobs, to move from one job to another more easily, and so on. And if you're really looking at an economic return, you have to look at the individual rather than the employer for the long term.

KJ:

You worked as a research fellow at the Universidad Oberta de Catalonia in Spain between 2003 and 2005. How did the institutional characteristics compare to other open universities?

TB:

The Spanish higher education system is very different from either the British or the American. The big difference for me was that when the rector (the university president) changes, the whole administration changes. It's not just the rector, but the vice rectors, the deans, the senior administrators, and everything, they all go. The new rector comes in and puts all their own staff into those positions resulting in upheaval about once every five years. This had nothing to do with it being an open university. This is the way all the Spanish universities worked. But it was very disruptive, because there's no long-term planning in that kind of system. There's a lot more of what I would call, not nepotism, but it's who you know. In Mexico, for instance, the faculty vote for the rector. That system has benefits, but it also has disadvantages because cliques try to take power. The politics of that kind of institution is interesting.

Like many open universities, the founding president at the Open University of Catalonia, Gabriel Ferrate, was a visionary and a very strong character. Similar to Walter Perry at the Open

University, Ferrate carried the institution to a strong position. Then other people came in and things started to change. I was there during one of those changes, but not for long because I was seen as part of the old administration and they got rid of me when the new one came in. But it was a very good few years when I was there.

The Open University of Catalonia was interesting. The mission of the university was to further the Catalan culture and language for all Catalan speakers around the world, not just those who lived in eastern Spain at the time. But they played it both ways. They had courses in Castellano, the main language spoken in most Spanish-speaking countries, as well as in Catalan. The Open University of Catalonia had a big influence in Latin America as well as in Catalonia. It was also good fun because the food was great and the culture was terrific.

KJ:

Given all of your experience with various open universities, how do you define an open university and has that definition changed over time for you?

TB:

I think they're less open than they used to be. When the Open University started, there were no tuition fees and anybody could apply even those without high school completion. There were voluntary preparatory courses for students who had no qualifications or an individual could just try a regular course.

My concept of open is literally open to anyone, especially those who haven't got any money. That's changed now. Students have to pay a lot of their own way. Now, there are so many open universities around the world, it's hard to generalize. But, they are less open than they used to be.

On the other hand, in countries like Britain or Canada, Canada particularly, access to higher education generally has improved a great deal. It was 8% in 1969 in Britain. Now, still only 35% of students go on to postsecondary education in Britain. In Canada, now around 70% go on to postsecondary education. The need for an open university is certainly less in Canada, and probably in the US now, than it is in the UK.

KJ:

What were the origins of the Canadian Digital Learning Research Association?

TB:

I was approached by Russ Poulin at WCET (WICHE Cooperative for Educational Technologies) and a Canadian colleague, Tricia Donovan, to see if we could create the equivalent to what Jeff Seaman was doing in the USA, which was an annual survey of distance education programs. In 2015 we didn't have an annual national survey of distance courses across Canada and I had been arguing for that in my blog. I was the initial chairman of the committee that set up that annual survey. We hired a full-time researcher and Chief Executive, Nicole Johnson, and that's going very well now, so I've stepped down from being the chair.

But it's still a challenge because often the universities don't have the necessary data, or the data in a format that allows them to be compared across institutions. That's particularly true of hybrid and blended learning because of the definition problems and attempts to capture individual faculty decisions about how to implement their class. The CDLRA and Nicole have done a great job working with Jeff Seaman to create a set of definitions that can be used across the whole system, but that still requires the institutions to classify their programs on the registration system to match those definitions.

The CDLRA has worked very well. They've changed focus to getting more information from faculty and students than institutional data because of the difficulty of obtaining institutional data. The Canadian Institutional Research and Planning Association (CIRPA) is responsible for collecting institutional data for government reporting. The chair of the CDLRA board now is the chair of CIRPA in an attempt to bring the research and the collection of data together so that it is more reliable. One problem is the dynamic nature of definitions changing and going out of date.

KJ:

How was the CDLRA funded initially? Has that funding changed over time?

TB:

The money either comes directly from the provincial government or through these provincial government agencies that support online learning. It has not changed a lot, except they are more successful now at getting money reliably. It's a little different from the US where there's more private sector or charitable support, but the CDLRA research is much more government-funded in Canada than similar research in the USA.

KJ:

What are some of the lessons learned from your consulting projects? What trends have you identified from that work?

TB:

I've really enjoyed the consulting business, although I stopped in April 2023. I was going to stop before COVID, but then I couldn't because everybody wanted advice on online learning. Consultancy businesses are very much dependent on networking, who you know, what the flavor of the month is in digital learning, and what people need help with, and that varies from not just within one country, but between different countries.

I really enjoyed consultancy work because I could give advice and then not have to be responsible for implementing it, which is always the hardest part. Not to say that I didn't spend a lot of time on implementation, but it's somebody else's responsibility. I'm there to say: here are your options, choose one, and then go with it. I was mainly doing strategic planning with questions such as: How do we support our online programs? Do we go to a commercial online company that will get us up and running and then take half the money, or do we build the service ourselves? Those commercial operations are not as popular today. So, I was an alternative to the online program management companies and I was a lot cheaper.

Usually institutions want to go in a direction but are not quite sure how to get there, and how to actually bring the rest of the institution along. Most of my work involved convincing faculty to change. And if somebody's found out how to do that, I'd really like to know because it's still a challenge! My experience is that in every institution, there's a core of faculty who are very open to change. And they're often the most senior or the most prestigious faculty, because they've made their career, they've had their work published, and so on. However, they want to improve to be great teachers. I started with them, but the hard part is getting out of that 10%, into the wider body.

My job was to suggest a number of strategies to help that happen such as an innovation fund for teaching to buy staff out for six months so they can prepare an online course. Another strategy was to hold meetings to explain why you're doing this, because surprisingly, often, that's not done. The senior management says, 'we're going in this direction', and the faculty say, 'yeah, off you go' because it's not explained to them. Usually, whatever senior administration comes up with is going to be more work initially for faculty. They need to understand that there's going to

be some return for that extra effort to change. Institutional support, like centers for teaching and learning, are critical because faculty can't do all this on their own when they are already so busy.

When I started, less than 15%-20% of institutions had a center for teaching and learning that focused on technology for teaching. They typically ran summer workshops on how to improve lectures, but weren't there to support a move to technology. In Canada, 85%-90% of all the universities now have a professional organization that supports faculty in using technology for teaching, not just online learning.

Over the 20 years I've been doing consultancy work, institutions are better prepared now for online learning and using new technologies. Although artificial intelligence is a big challenge, it would have been an even bigger challenge without that development. Now there are people who can make some sensible decisions about AI and not just follow the herd.

KJ:

Earlier you mentioned Chuck Wedemeyer, so let's return to some of the early theories of distance education. What are your thoughts on the theories of distance education?

TB:

It depends how you define theory. You could have a descriptive theory, I suppose. But I'd rather have a predictive theory. I don't think there is a theory of distance education because there are theories of education and different methods of distance education. Michael Moore's Theory of Transactional Learning is useful, but it's not specifically to do with distance education. It would apply to most modes of learning. Otter Peters' theory, looking at distance education as an industrial approach to education, well, yes, that's an approach but is it a theory? A theory should allow you to predict something. It should allow you to say, okay, here's what's happening. Now, what does the theory tell us we should do about this? And most of the theories don't do that. So, I'm not a great fan of theorizing about distance education. I'm all for categorizing it, for looking at different ways of doing it, and looking at the pluses and minuses of that.

I think we need more research focusing on how learning has changed or stayed the same despite or because of the new technologies and the way people interact with them and the way they learn from them. I think Stephen Downes has done a great job trying to come up with a new theory of Connectivism, although I'm not convinced it's the right theory.

KJ:

How would you assess the impact of professional conferences in the field of open and distance education to your development, to some with whom you've collaborated closely, and to the field generally?

TB:

They were critical in my early development. I came to the first International Council of Distance Education (ICDE) conference in Vancouver in 1982. And although it wasn't a very good conference, it put me in contact with lots of people and helped my professional development. I particularly got to know Canadian distance educators from that conference. I went to a lot of European conferences before I left the Open University, such as the European Commission's DELTA program, and also conferences or meetings looking at how distance education could bridge national boundaries. We looked particularly at the use of satellites. I also liked the EDEN (European Distance and E-Learning Network) conferences, particularly their workshops for the researchers. All that came about through conferences and connections.

Now after COVID, Zoom, the cost of travel, international travel, the environmental effects, etc., gatherings of people interested in online and distance education are still important. The face-to-

face connections make it much better. But I think we need fewer of them and better organized ones, say once every four years that are done very well, rather than every year. There should be lots of opportunities for social meetings, and not just a formal presentation of papers.

I recently attended the ICDE 2023 conference in Costa Rica. It was really important for Costa Ricans to meet other professionals in the field from around the world. However, I didn't find it very stimulating academically, but then it's not really for me because it's for the younger people moving into this field. There's always a lot every year who are new to this field. Those conferences are really useful for bringing them up to speed with substantial papers to learn what the leading edge is and be exposed to what the previous research has already clarified so they don't waste their time repeating what's already known or making common mistakes.

I think there's a great need for local conferencing or regional conferencing. But international conferences could be run regularly at a distance and supplemented with face to face conferences spread out every four years.

KJ: Thank you for sharing your time and expertise.

References

Nichols, M. (Host). (2018, April). Tony Bates (No.1). [Audio podcast episode]. In *Leaders and Legends of Online Learning*. https://onlinelearninglegends.com/podcast/001-professor-tony-bates/