

Examples of research and evaluation 2

UNIT 4

Unit overview

In this final unit, you will turn your attention to services for learners beyond tutoring and teaching to look at needs assessment, setting priorities and evaluating a range of learner support services. At each step of the journey through their studies, learners have different needs, from pre-enrolment through post-graduation. As discussed in the first unit of this course, a range of support services and systems are needed in order to enhance successful completion of their studies. Setting service priorities can be challenging, particularly within the context of the broad range of learner needs and limited resources to meet these.

You will remember from Unit 1, that there are four main types of evaluation research: needs assessment (planning), formative (process), summative (outcome), and cost-benefit (efficiency). In the first part of this unit, you will be introduced to the steps of doing a simple needs assessment and in the second, you will critically analyse a unique case study that describes an educational project from needs assessment through completion. From examining this project, you will be able to see the logical progression from needs assessment to choosing services and setting priorities according to context, and then finally, to evaluation methods that feed back into improvement of practice.

Learning outcomes

When you have worked through this unit, you should be able to:

- ▶ Plan and implement appropriate investigations of learner support practice including needs assessment.
- ▶ Effectively carry through all steps of practitioner research including disseminating findings, gathering feedback, engaging in discussion, and taking action to improve practice.

Doing a simple needs assessment

Setting service priorities within the context of limited resources and unlimited needs is a constant challenge for learner support practitioners. A needs assessment can be an important step in defining priorities whether your

institution is just beginning to consider expanding into new areas or whether it already has a broad spectrum of services for learners.

What is a needs assessment?

Practitioners, when planning what services to offer to learners, often make assumptions about needs. These are based on their knowledge of the field, their particular learners and their context. For example, we may assume that learners should have to complete a compulsory orientation programme because too many dropout early in their courses due to lack of prior knowledge about the special demands of distance learning. Our success in meeting the actual needs of learners depends to a great extent on the accuracy of our assumptions. This is where the value of needs assessment lies. It helps us to check our assumptions against real data gathered from learners and other sources. In this way, it tests what we think we know about learner needs and tells us how accurate we are in what we have assumed.

A needs assessment is simply a systematic process for finding out who has the need, how important it is that the need be filled and how many people are experiencing the same need. Needs assessment may also examine why a particular need exists and may point to some possible solutions for meeting the needs that have been identified. In education, a needs assessment will be framed in the context of the institutional mission. Embedded in the institutional mission are certain values that will help frame the assessment. For example, an open distance learning institution may place strong value on extending access to those who have been disadvantaged in the traditional system. This mission has direct implications for the kinds of learner support that will be needed. Hence, we can further define needs assessment as ‘... determining the presence or absence of the factors and conditions, resources, services, and learning opportunities that students need in order to meet their educational goals and objectives within the context of the institution’s mission’ (Upcraft and Schuh, 1996, p. 128).

Before proceeding to the process of needs assessment, it might be helpful to consider what is meant by ‘need’. The term means different things to different people. A needs assessment can be employed to investigate learners’ needs, wants, preferences, or some combination of these. All three terms are quite similar in meaning but could have different implications for planning services. The existence of a desire or want does not necessarily mean that learners will use a service designed to address it. For example, learners may indicate that they are very concerned about not having contact with peers, but it does not necessarily follow that they will attend gatherings of their peers organised by the institution. Other factors such as time priorities and location will have an impact on actual behaviour. It is important to clarify during the assessment what information you want to gather from learners about their needs, wants, and preferences. As part of an assessment, you will want to not only document the types of needs that learners have but also to look at

prevalence, urgency, and relative importance. These will be key factors in setting service priorities.

Why do a needs assessment?

There are many reasons for doing a needs assessment, not the least of which, as noted above, is to check our assumptions and build good data for setting priorities. Here is a list of reasons why needs assessment is part of good practice:

Reading



Needs assessment contributes to sound planning and resource allocation. Planning involves establishing priorities. Information about learner needs and potential learner needs is crucial in providing a rational basis for planning your support services and allocating your resources, particularly when faced with difficult choices.

Needs assessment helps in matching services to needs. Practitioners are very good at sharing information about effective practice. However, before offering any new service, even if it has been offered elsewhere successfully, you should have a clear indication of the need for it. Needs assessment can help you to determine what the support services needs of your learners are and alternatives for meeting these needs.

Needs assessment takes guesswork out of planning. Too many practitioners rely on their instincts or assumptions about learner needs, rather than formally checking with learners. Sometimes a service is offered because it makes intuitive sense or was offered elsewhere successfully or because there is a new popular trend in practice. The perceptions and assumptions of practitioners are a rich source of information about needs but should not be the only source of data used in planning support services.

Needs assessment increases accountability. Educational institutions are increasingly expected to account for the way in which they spend their resources and serve their learners. Stakeholders want to know that resources are being spent wisely on support services that meet demonstrated needs.

Needs assessment is an equaliser. Those groups with more political influence and those who are most vocal in making their demands heard are most likely to get support for their needs. Needs assessment efforts and data can raise awareness and influence opinion both within and outside your institution about unmet needs from groups that may not have a voice to speak for themselves.

Needs assessment is good practice. Learners who are involved in the process of planning support programmes are more likely to use and benefit from the services. They may also have very helpful ideas about how to offer services so that they are more accessible. Needs assessment is one of the ways we have of ensuring that the learner's voice is heard.

When to do a needs assessment

As well as periodically doing extensive needs assessments, practitioners can carry out needs assessment on an ongoing basis in small ways (e.g. checking learner satisfaction with services, recording participation rates, etc.). Critical indicators of when a more extensive needs assessment might be in order include the following:

- 1 When your learners change, and consequently the challenges and issues change, and you start to suspect that a change in support services is required. For example, in Canada, over the past 10 years, the demographics of the distance learner have changed quite radically from older, primarily rural and female and occasionally disadvantaged learners, to younger, primarily urban, more evenly mixed gender learners. This has important implications for learner support.
- 2 Your institution or support unit is receiving requests for a service or services that is not currently provided. For example, tutors or staff in regional support centres will often become aware of unmet learner needs because they are on the frontline of service to students.
- 3 Your institution is considering expanding its recruitment area, or is offering new academic programmes that are attracting different kinds of learners than you have had in the past.
- 4 You identify a need that no other institution fulfils for distance learners (e.g. credit coordination or prior learning assessment), and you wish to provide this service but you need to make a case for funding.

When not to do a needs assessment

Needs assessment, just as with any other type of research, requires careful planning. You are probably not quite ready to do a needs assessment if the following are true:

- ▶ you are not quite sure what information you need to collect – or whether to do a needs assessment, a programme evaluation, or a feasibility study for a new service. Just as with any other research, the purpose of the needs assessment should be very clearly articulated so that the data collection plan is based on solid objectives and has the best opportunity for success.
- ▶ there are strong differences of opinion within your institution about the purposes and uses of the needs assessment. Conflict may indicate misunderstandings or real differences in opinion regarding the mission and values of the institution which are manifested through conflict over resource allocation. A needs assessment should be based on a strong agreement about purpose and objectives.
- ▶ your institution lacks the resources to carry out even small changes in support services for students.

Too many needs assessment reports are unused. This can happen for a variety of reasons including the following:

- ▶ the report is not written in a way that makes it useful. The statistics are difficult to interpret and/or there are too many recommendations or the recommendations are vague or unrealistic.

- ▶ the study produces interesting findings but not the needed information – indicating that there might have been problems in the planning stage of the study and the methodology did not match the purpose.
- ▶ the needs assessment findings are unanticipated, and the institution is either unwilling or unready to make necessary changes to respond – see the next two points.
- ▶ the institution does not have the resources to act on the recommendations. This can be disheartening, not only for staff, but for those learners whose expectations were raised by their participation in the study. Institutional commitment to the needs assessment process and realism in making recommendations are both important.
- ▶ there is resistance in the institution (for a variety of reasons) to act on the findings and recommendations. If possible, resistance needs to be identified before the needs assessment, possibly by including various segments of the institution in the process.

Methods and sources for data collection

Just as with other kinds of research, there are a variety of ways in which you can collect data for a needs assessment. Quantitative data is helpful in getting a broad picture, and qualitative data is helpful in gaining understanding through detail and nuance. Using both approaches for the needs assessment is usually best.

Reading



Questionnaires

Questionnaires have the advantage of being a standardised way to collect a great deal of the same information from a many people. They are easy to administer and, if well designed, the responses are easy to analyse and interpret. Questionnaires are often mailed to respondents but this method can be unreliable and the response rate is usually low. Administration by telephone or in person is often the best method. This requires training of staff or volunteers to administer the questionnaires but guarantees data collection will be collected reliably and in a timely manner.

If you are collecting data both from non-participants and current learners, you will need different questionnaires aimed at these two groups. The questionnaire for learners will focus on their use and satisfaction with current support services, whether they have unmet needs, and whether they have specific suggestions for new or improved services. In the case of those who are not students, you will want to know whether they have learning needs that are unmet, whether there are barriers to their participation, and whether certain kinds of support services would make a difference to their participation.

Questionnaires can also be used to collect socio-demographic data so that data can be analysed according to certain profiles (e.g. rural women over the age of 30). It is important as you design your questionnaire to carefully think through to what data you will need in order to answer your most pressing questions.

Questionnaires can employ rating scales, yes/no or true/false responses to aid ease of analysis of data. If large numbers of people are being surveyed, no more than a couple of open-ended questions should be asked on the questionnaires. This avoids collecting data that is difficult to analyse and use. Questionnaires should always be pilot tested with members of the target group prior to use in order to ensure that the questions are clear, easy to answer, and do not raise issues outside of those being investigated.

Interviews and focus groups

Qualitative methods of collecting data about learner needs include interviewing individuals and using focus groups (groups made up from members of the target group brought together to give information). The advantage of focus groups is that the process is usually more dynamic, with participants building on each others' ideas. With either individuals or groups, the interview or questioning method used to illicit information can range from more structured (a pre-set protocol or set of questions, asked in the same way by a facilitator who is trained to treat each situation alike) to less structured (more exploratory). The purpose is to collect data that will add meaning to the quantitative information through dialogue, exchange, and clarification. There is not necessarily a set number of interviews or groups that is required to collect sufficient data. Rather, data analysis takes place as data is collected by organizing the information received into units. Just as in the example of the exploratory study using the critical incident technique in the previous unit, themes and categories begin to emerge. Smaller categories can be grouped into larger overarching themes. Interviews can continue until it is clear that there is redundancy in themes and little or no new information is coming forth.

Key informants

You may also want to survey or interview **key informants**. These are people in a community who are in a position to understand educational needs. They need not be professionals, nor must they be high profile (although they may be and it is important to include those who will expect to be included).

Key informants

People in a community who are in a position to understand educational needs.

Many front-line workers and volunteers have valuable insights and knowledge about the needs and services in their communities. If you employ this method in your needs assessment, you will need to carefully select informants who represent a variety of perspectives. Needs are perceived differently depending upon who is doing the perceiving and the process can be quite value-laden. However, a broad variety of perspectives from key informants can offer fresh perspective and the information obtained often serves as an excellent basis for designing a questionnaire to be used with non-participants (those who are not currently enrolled, perhaps because of barriers).

Persistence and participation rates

Persistence and participation rates are one indicator of how students evaluate their learning experience. Records of how many students use particular services are helpful as are waiting lists for a service. If analysis of persistence and participation can be done for specific groups (e.g. younger students, full-time employed students), it may be very helpful. Record-keeping is an important function within learner support, telling you who is using your services, who is coming into the regional learning centres, who initiates contact with tutors, and so on. Equally important is knowing who is **not** using learner support services and why. Careful record-keeping can help answer these questions and add considerable value to a needs assessment.

Institutional databases

Institutional databases often contain a wealth of information that can be helpful in determining learner profiles and developing hypotheses about needs. Information such as

age, gender, geographical location, work situation, previous educational experience, previous grades achieved, cultural background, physical or other limitations can be found in such databases. Registrar's offices will also have information about enrolment and withdrawal patterns in courses, and overall completion rates which you may be able to analyse by learner characteristics. If this kind of information is not routinely being collected, you may want to institute changes to your admission and enrolment forms and your data recording procedures so that this kind of information is available in future for institutional research.

Steps in needs assessment

Once you have determined readiness and commitment for a needs assessment, you can begin planning. As always, a review of the literature will provide you with a solid background. If you are interested in finding out about a particular need, for example, serving special needs students, you will definitely want to review the literature on this particular topic before starting. The steps outlined in Unit 2 for planning a research project can be adapted for planning a needs assessment:

Reading



Step 1: Clarifying your purpose and questions

Before you start, you will want to be clear about the rationale for the needs assessment, the purpose of the investigation, and the specific questions that you want to answer. It may be that there is a particular new area of concern that you want to investigate or that you have noticed that your learner profile appears to be changing. In any case, the first step is to set out your objectives in writing.

Step 2: Determining who has needs

Once you have set out the purpose of your needs assessment, you can decide who will be the best source of information. A needs assessment can focus on those learners that are currently enrolled and you can determine their level of satisfaction with the support they are currently receiving, whether they perceive that their needs are being met, whether their needs have changed, and whether they have unmet needs that you could do something about. This type of investigations is sometimes called a satisfaction assessment but this can be misleading. You want to ensure that you can identify changing or unmet needs as well as those being met by current services.

A second possible (and important) target group for needs assessment is those learners and potential learners not currently enrolled. Perhaps one of the barriers to their participation has to do with their needs. In this regard, you might choose to assess the educational and support needs in a particular community or geographical area (a community-wide assessment), or those of a particular sub-group, for example, rural women that you perceive to be underserved. An external needs assessment might be done in two or more steps using these different approaches. You might first investigate the needs of the community, and then if you identify a group with unmet needs, for example, rural women, you could then focus your needs assessment on examining their challenges and how you might help meet them.

Step 3: Choosing an approach

There is no one right approach to needs assessment. As with any other research, your guide will be the purpose of your investigation and contextual factors such as resources available. If possible, it is important to use a variety of methods and sources of information as those described above. A good starting point is to review what information is currently available from institutional databases, service participation records, and any other existing documentation. From this, you can try to develop a profile of your learners, their behaviour, and their service usage. Then you can make a decision about whether to use questionnaires, interviews, focus groups, or a combination of these to collect the data you need to answer your questions.

Step 4: Setting out a plan of action

Your next step is to produce a written plan for your needs assessment including your objectives, what information you need to meet these, from where you will collect the information, the methods you will use, how you will analyse and report the findings, and how you will disseminate the information and to whom. These steps should be set out along specific timelines. As with any other plan, this will serve as your guide, and may need to be revised as new information is discovered or new circumstances arise during the process.

Step 5: Reporting your findings

It is important that you analyse, summarise and report the findings in a way that is most accessible and useful to those who will receive the needs assessment results. (The guidance in Unit 2 will be helpful in preparing the report.) It will be important to ensure that the research findings are clearly linked to the problems and/or issues you identified at the outset, that you state clearly what the implications of findings are for support services, and that you suggest a choice of realistic actions for decision-makers to consider. In order to enhance understanding of the findings and commitment to action, you may want to go beyond dissemination of a written report. It may be helpful in making full use of the needs assessment to give some oral presentations to particular groups within your institution and if possible, to set up discussion groups to consider the findings and possible responses to them. This type of dialogue can help move the process into a phase where improvements in student experiences and learning can be realised.

Step 6: Using the needs assessment

To return to the beginning, the purpose of undertaking a needs assessment is to contribute to better planning and priority setting as a basis for offering relevant, meaningful and useful support services for learners. If the needs assessment achieves the purposes set out in the research plan, the chances are that you will have a clearer idea of the type and extent of your learners' needs and you will have assessed the relative importance of these needs. Finally, you will have some recommendations for action. Your findings should now be incorporated into your planning process. Quality is an overarching concern in education. Being able to demonstrate that programmes, services, and learning opportunities are of high quality is essential for those who plan and provide learner support services. Careful application of needs and satisfaction assessment are crucial in this process and should be incorporated into the annual routines of practitioners.

Activity 1 60 mins**Laying the groundwork for a needs assessment**

Assuming that you think a needs assessment is indicated in your context, write out your responses to the following questions:

- 1 What reasons do you have for doing a needs assessment?
- 2 What signs in your institution indicate a needs assessment is required?
- 3 What do you hope to find out from the needs assessment? What specific questions do you have?
- 4 Can the information you need be obtained in any other way?
- 5 Whose needs should be assessed?
- 6 Will a needs assessment answer your questions? (e.g. If you are concerned about a service not being used such as group meetings in a regional learning centre, maybe you need an evaluation focused on finding out why this service is underused?)
- 7 When does the needs assessment have to be completed in order to be most useful?
- 8 Does your institution or work unit have the resources to do a needs assessment?

Ask your colleagues to respond to the same questions and discuss your responses. Differences in opinion will help you to clarify whether a needs assessment is necessary, and if so, for what purpose.

The next set of questions will help you to determine the kind of information you need, and whether there is commitment to use the information obtained. First write your own responses to the questions. Then consult with others in your institution:

- 1 Has your institution or your work unit done a needs assessment before? What were the results? Were these implemented? If there were problems with implementation, what were these?
- 2 Imagine some possible results to a new needs assessment and reflect on the implications for your work unit or institution?
- 3 Who will use the needs assessment? How much influence do they have to implement its recommendations?
- 4 Does your institution have the resources and/or the staff to take action on what is learned from the needs assessment or are you doing the needs assessment to make a case for funding?
- 5 Could a new service or programme be considered at this time?
- 6 Could some parts of the programme or service be modified?
- 7 Could new methods or procedures be adapted? If no, why not?

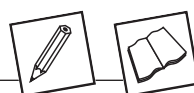
- 8 What is likely to be the commitment of the key people who would have to implement any changes?

The feedback to this activity is at the end of the unit ►

Evaluating outcomes: a case study

In this last section of the handbook, you will have an opportunity to review an ambitious ODL project, consider the various learner support mechanisms employed, and think about how you would evaluate these for effectiveness, efficiency, and other outcomes. The project is summarised in the paper, 'Open and Distance Learning in the Gobi Desert: Non-formal Education for Nomadic Women' written by Bernadette Robinson (1999). The project report includes a needs assessment, specific objectives, and a fairly detailed description of how the project was implemented, and the outcomes that could be determined. The challenges for those involved in the project were enormous, and the gains made were surprisingly substantial. As well as describing the positive outcomes, the author identifies some of the shortcomings, including oversights regarding various aspects of evaluation. The project is an interesting one to examine because it involves the planning and implementation of a non-formal education programme over a relatively short period of time. Hence, it is an ODL case study that can be reviewed from beginning to end. Despite extremely challenging circumstances, the project team implemented a variety of learner support methods to assist learners in their studies. Although an overall evaluation of the project was done, the specific methods used (if any) for evaluating the learner support activities are not described.

Activity 2



Analysing a case study: open and distance learning in the Gobi Desert

You will need to use the reading *Robinson 1999* from the 5 for this activity.

Read the report 'Open and Distance Learning in the Gobi Desert: Non-formal Education for Nomadic Women' by Bernadette Robinson (1999). Then do the following:

- 1 Identify all of the learner support mechanisms that were employed during the course of the project. (You should be able to identify at least half a dozen.)
- 2 List all of the ways in which the author notes that data collection and other aspects of evaluation could be improved. These are embedded in various parts of the report.
- 3 Write down the methods you would use to evaluate the effectiveness of each of the learner support mechanisms you identified given the constraints of context and other considerations such as cultural issues.
- 4 Compare your responses to the feedback at the end of the unit.

- 5 Think about the next steps for the Gobi Desert project. Given what you know about the learner characteristics, the objectives of the project, and the context, what other forms of learner support might be both possible and effective? What evaluation methods would you put in place for these? Is further needs assessment necessary?

The feedback to this activity is at the end of the unit ►

Unit summary

In this unit, you considered various types of evaluation. You learned the steps involved in preparing for and implementing a needs assessment, and considered ways to ensure that the findings will be both useful and a call to action. You also reviewed an educational project from the standpoint of a learner support professional, looking at the fit between needs and support methods employed and how each of the support services and resources could be evaluated and improved. Needs assessment together with formative and summative evaluation are the most common and useful means of assessing the appropriateness and effectiveness of our service model and every day practice, and should form part of our regular activities as practitioners.

Study tip



Think about how the Gobi Desert project relates to your context.

What did you learn that you can use in your own work?

Discuss your thoughts with colleagues.

This brings you to the end of the handbook. We hope that you will be enthusiastic about incorporating research and evaluation into your practice, and that the course provided some new knowledge and skills that are enabling you to do this.

Project task



Planning a needs assessment

Following the same format and steps that you used in Unit 2 to plan a research project, outline a needs assessment for some aspect of learner support in your institution.

- 1 Using your responses to questions from the previous needs assessment activity, start by writing down the reasons for a needs assessment and the most important questions you want answered. Consider how you want to approach the investigation. Do you just need information from current learners or does the wider community need to be

included in your study? The assessment may be short term such as a consultation with focus groups from a specific population to find out how well their needs are being met or the assessment may be more extensive if you feel this is what is needed at this time. Once you have a good idea of what you would like to do with the needs assessment:

- 2 Using the information about methods and process provided above, write down a research plan similar to the example given in Unit 2. Be only as detailed as you can be at this time – you will fill in the plan as you gather more information. Try to be realistic about timelines but keep in mind that these may have to change as information becomes available or as circumstances change. As you work through your plan, think carefully about resources needed and make notes about these.
- 3 Share the plan with colleagues, and meet with them to get feedback. Revise your plan as appropriate. If the plan involves the cooperation of specific staff such as advisors, tutors, or those who are located in regional learning centres, make sure to include them in your consultation.
- 4 If developing the plan raises specific questions for you, try to get answers for these. (e.g. What records do we keep of learner usage of learning centres?)

References

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Feedback to selected activities



Feedback to Activity 1

Your responses to these questions and the discussion with your colleagues should give you a good idea of whether a needs assessment is necessary, the purpose of a needs assessment at this time, how ready you are to do a needs assessment, and the commitment level to respond to the findings of the investigation. Staff can feel threatened by a needs assessment, for example, thinking that it is being done to evaluate their performance. Administrators may be reluctant because they anticipate changes to service could present new difficult challenges. Hence, discussion with colleagues at all levels is important in laying the groundwork for a successful investigation. Engaging them in the process of clarifying the objectives of needs assessment will help them understand why a needs assessment could be a very positive step in improving service to learners. Once you have agreement on purpose and good sense of commitment, you will be ready to move ahead with confidence to the planning and implementation of your needs assessment.

Feedback to Activity 2

The report from the Gobi Desert Project is a useful case study in many ways. It reveals that it is possible to provide learner support in the most challenging of circumstances. In addition to print materials, women who participated in the project had access to radio programmes, and local meetings that included tutoring, demonstrations and skills coaching, and social interaction with peers. Other sources of support included crash courses at district centres, small information centres, visiting teachers, letter exchange through the travelling box, and local newsletters. Presumably there were also administrative systems (e.g. registration and course materials distribution). Although it was possible through the final (summative) evaluation to identify a number of positive outcomes and difficulties with the project, the author notes a number of ways that evaluation could have been improved:

- ▶ better record-keeping would have provided information about participation rates and learner characteristics
- ▶ formative evaluation would have allowed for improvements while the project was in progress (e.g. self-reports of skills gained)
- ▶ no baseline information was collected, making it difficult to accurately measure learning achievements.

Each of the learner support mechanisms can be evaluated through a variety of means. For example, the group meetings might be evaluated through participation rates and self-reports of satisfaction, as well as measurement of gains in knowledge and/or skills and attitude change). Radio programmes might be evaluated by short questionnaires in the print materials that could be returned through the travelling box. Keep in mind, that the methods of evaluation should relate back to the objectives of the project which were as follows:

- ▶ to develop national capacity in non-formal education and open distance education, and
- ▶ to assist Gobi women to survive the sudden changes affecting their lives (through providing access to information and knowledge, changing attitudes and developing skills for self-reliance and income generation).

The data collected can then be interpreted in the context of evaluating how well these objectives are being met, and how learner support methods contribute (or not) to meeting the objectives.

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Unit 4

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