# Leaders in Open and Distance Education in North America

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## Introduction

The North American leaders in open and distance contributed to leadership, theory and research in open and distance education. Early distance education in North America can be traced back to Charles Wedemeyer who was a Professor of Education at the University of Wisconsin-Madison. He used technology available at the time to improve access to education for those who were not able to participate in the traditional education system. In the 1960s he predicted that individuals would be able to access education from anywhere and any time using technology. As we all know this is a reality today. The vast geographical areas of North America, especially Canada with many remote locations, motivated North Americans to make the rapid shift to open and distance education (ODE). This new paradigm required excellent and bold leadership to move ODE into the future. The early leadership was started by Sir John Daniel who brought his international leadership experience to benefit open and distance education in North America. At the same time, Michael Moore developed and introduced many theoretical ideas that shaped ODE in North America. Researchers and implementers such as Rory McGreal, Marti Cleveland-Innes, Terry Anderson, Badrul Khan, and Heather Kanuka implemented many innovative research and development projects to move open and distance education into the 21st century. The contributions made by the North American leaders in open and distance education are helping to achieve Goal 4 of the Sustainable Development Goals (SDGs). This goal is to provide inclusive and equitable quality education and promote lifelong learning opportunities for all.  The most effective method to help achieve this goal is to implement open and distance education to educate everyone regardless of location, ethnic status, economic background, gender, and age.

## Sir John Daniel

Sir John Daniel is a 45-year veteran of open and distance learning. His full-time education was at Christ's Hospital, Oxford University (BA, MA in Metallurgy) and the Université de Paris (Dès-Sc in Nuclear Metallurgy). On joining the Ecole Polytechnique of the Université de Montréal as assistant professor of Metallurgical Engineering in 1969 he began part-time study for an MA in Educational Technology at Sir George Williams University. He carried out the three-month internship required by the programme at the UK Open University then (1972) in its second year of operation. This was a revelation. He felt that he had seen the future of higher education and wanted to be part of it.

A year after returning to Canada he joined the Télé-université of the Université du Québec as Head of Educational Technology and became Director of Studies a year later. In 1978 he moved to Athabasca University as Vice-President for Learning Services and guided that institution in crystallising its

curriculum and methods. In 1980 he was appointed Vice-Rector, Academic at Concordia University and in 1984 President of Laurentian University, a dual-mode institution in northern Ontario offering both on-campus and distance programmes. In 1982 he was elected President of the International Council for Distance Education at its conference in Vancouver.

In 1990 he was named Vice-Chancellor of the UK Open University, where he served until 2001. Student numbers grew from 100,000 to 200,000 during his tenure and the UKOU was rated fifth among English universities for the quality of its teaching.

From the UKOU he moved to UNESCO as Assistant Director-General for Education where, in addition to oversight of UNESCO's education work at all levels, he was responsible for coordinating the global campaign for Education for All. In 2004 he was appointed President of the Commonwealth of Learning, where he served until his retirement from full-time appointments in 2012.

Of Sir John's 370+ publications, the large majority address issues of ODL, educational technology and higher education management. In a life and career that has taken him to 122 countries he has interacted with many governments on these questions. He considers himself a 'scholar-practitioner' rather than a researcher although his best-selling book *Mega-Universities and Knowledge Media: Technology Strategies for Higher Education* was developed from his Master's thesis at Sir George Williams/Concordia. His book *Mega-Schools, Technology and Teachers: Achieving Education for All* addresses the challenges of mass distance education at the secondary school level.

During his early career he was known particularly for his paper *Independence and Interaction: Getting the Mixture Right.* Later his name was closely associated with the *Iron Triangle* of access, cost and quality that he used to explain why only distance education could deliver access and quality at scale.

Sir John was knighted 'for services to higher education' in 1994 and appointed Officer of the Order of Canada in 2013 'for his advancement of open learning and distance education in Canada and around the world'. His 32 honorary doctorates are from universities in 17 countries.

## Michael Grahame Moore

Distance education as a field of academic study, research and scholarship in the United States can be traced to a presentation by Michael Grahame Moore at the 1972 conference in Warrenton, Virginia, of what is today known as The International Council for Open and Distance Education (ICDE). Until that time, teaching was defined in the educational literature as a process occurring exclusively in a classroom, and although distance education was widely practiced in the form of correspondence study and by broadcasting, and even the early use of telecommunications and computer technology, such teaching and learning had no place in educational theory or scholarly and research literature. In the 1972 presentation, Moore challenged the exclusivity of the classroom and defined a new field of study that he called "distance education", with an outline of what he described as the "macro-factors" of the field.

Since that presentation, Moore's career has been devoted to the further development of distance education as a field of academic study and research. While teaching the first course in this subject at University of Wisconsin-Madison in the mid 70s he initiated the idea of holding a national conference there, a conference that continues to the present time. Joining the faculty at The Pennsylvania State

University in 1986 he established the American Center for Study of Distance Education, experimenting with new forms of teaching online through the 1980s and 90s, established a national research symposium and one of the first online forums (Distance Education Online Symposium). In 1986 he founded the first American research journal (*The American Journal of Distance Education*) and continues as its editor to the present time (2017).

Based on an early adult education career of seven years in East Africa, Moore has maintained a special interest in the use of distance education in economic and social development. This has involved periods of full time employment at the World Bank and as consultant for other international development agencies, including the IMF, UNESCO, UNDP, UNHCR, and several national governments. These include ten years' work in Brazil to develop teacher education, and similar work in the Republic of South Africa, beginning with a review of national educational policy at the time of the first democratic election there. In Europe, notable projects included introducing teleconferencing methods in Finland at the Universities of Helsinki and Turku, in Russia at the National Training Institute, and in Sweden training for major corporations and the armed forces of Sweden, Norway, and Denmark.

Moore served as Vice-President of the International Council for Distance Education from 1988-92. Recognitions include appointment as Senior Fellow of the European Distance Education and eLearning Network, induction into the United States Distance Learning Association's Hall of Fame and also the Adult Education Hall of Fame; award of an Honorary Doctorate by the University of Guadalajara; appointment as Consulting Professor at Shanghai Open University, China; Visiting Research Fellow at the University of Cambridge (UK), Visiting Professor, Universidad del Salvador, Buenos Aires, Argentina; Visiting Professor at the (UK) Open University.

## Tony Bates

Tony Bates made (and continues to make) significant contributions to open and distance learning in North America. He served as consultant to many national and international organizations advising them on e-learning and distance education. His consultant role includes UNESCO, the World Bank, U.S. state higher education commissions and universities, the U.K. Open University, the Council of Ontario Universities, and many Canadian colleges and universities, advising on their online learning strategies. He has worked as a consultant in over 40 countries. He has been a Research Associate with Contact North since 2007.

From 1990 to 1995, he was Executive Director, Research, Strategic Planning, and Information Technology at the Open Learning Agency of British Columbia. Prior to that, he was Professor of Educational Media Research at the British Open University, where he worked for 20 years as one of the founding members of staff.

Tony was Director of Distance Education and Technology in the Continuing Studies Division of the University of British Columbia, Vancouver, Canada from 1995 to 2003 and also Research Team Leader of MAPLE, the Centre for Research into Managing and Planning Learning Environments in Education at UBC. While at UBC, he was instrumental in setting up, initially in partnership with Tec de Monterrey in Mexico, UBC's fully online Master in Educational Technology, which has been running successfully since 2002.

In addition to delivering speeches, Tony's expertise was disseminated through his publications. He is the author of twelve books, including his latest, a free, open online textbook for faculty and instructors, called *Teaching in a Digital Age*. It has been or is being translated into seven languages. Other books include *Managing Technology in Higher Education: Strategies for Transforming Teaching and Learning*, co-authored with Albert Sangrà of the Open University of Catalonia, and published by Jossey-Bass/John Wiley in 2011, *Technology, e-Learning and Distance Education*, published in 2005 by Routledge, *Managing Technological Change: Strategies for College and Universities Leaders*, (with Gary Poole) *Effective Teaching with Technology in Higher Education*, both published by Jossey-Bass, and *National Strategies for e-Learning* published by UNESCO.

## Martha Cleveland-Innes

Dr. Martha Cleveland-Innes is Professor and Chair in the Center for Distance Education at Athabasca University in Alberta, Canada. She studied the sociology of education at the University of Calgary where she developed her strong views on the importance of high quality education in the development of healthy societies with a well-developed citizenry.  Her commitment to open and distance learning is rooted in this perspective; education must be accessible, affordable, and of high quality for everyone, anywhere.

Evidence-based practice supported by sound theory is a main driver in Martha's scholarly work. She is a principal researcher on the Community of Inquiry framework for online and blended learning, a framework designed to maximize deep learning and provide students with a learning experience that is developmental and sustainable. She is co-author of a book on the topic with Drs. N. Vaughan and D.R. Garrison: *Teaching in Blended Learning Environments: Creating and Sustaining Communities of Inquiry.* Martha held a major research grant from the Canadian Social Sciences and Humanities Research Council, which supported rigorous empirical tests on the value of this framework.

In her fifteen years as an academic at Athabasca University, Martha has been involved in numerous research projects on open and distance learning and has taught, supervised, and supported hundreds of graduate students working in the same area of education. She co-edited a book published by Routledge in 2010 entitled *An Introduction to Distance Education: Understanding Teaching and Learning in a New Era.*  This book is now being revised and will be published in 2017 as a 2nd edition.

Martha is the Chair of Athabasca University's Advisory Group on MOOCs. She is the project lead on the development and delivery of AU's MOOC *Learning to Learn Online,* currently in its third implementation. She is also the co-lead of a MOOC designed and delivered in partnership between AU and the Commonwealth of Learning: *Technology-Enabled Learning*. Both MOOCs are designed using the Community of Inquiry framework for online learning and are the subject of extensive research. This research has been presented and published in North America and Europe.

Martha has received awards for her work on the student experience in online environments and has received many research grants to study open and distance learning. In 2011 she received the Craig Cunningham Memorial Award for Teaching Excellence and in 2009 she received the President's Award for Research and Scholarly Excellence from Athabasca University.

In 2012 Martha was invited to be a Guest Professor at The Royal Institute of Technology in Stockholm, Sweden.  Her work there is part of a major campus redesign toward blended learning and

her appointment is on-going. There she participated in the development of a theoretical model called *Relationships of Inquiry* for open and distance learning and is now the co-lead of a campus-wide project to integrate evidenced-based practice into the running of the institution, called *Practitioner-Research in Engineering Education.*

This year (2017), Martha was invited to Portland, Oregon to present a workshop on Collaborative Online Learning at the Oregon Health and Science University. She will offer a webinar in Scandinavia on Flexible Learning in March and will return to Beijing in September as an invited international scholar by Beijing Normal University to do research on the Community of Inquiry with teachers at the Open University of China.

## Rory McGreal

Rory McGreal is a the holder of the UNESCO/Commonwealth of Learning Chair in Open Educational Resources at Athabasca University - Canada's Open University. He is also a Professor in the Centre for Distance Education. His other responsibilities include being the Co-Editor of the *International Review of Research in Open and Distributed Learning* (*IRRODL*), which is Canada's first open access scholarly journal. He is also Director of the Technology Enhanced Knowledge Research Institute (TEKRI) and the co-Chair of the Alberta provincial steering committee on OER. Prof. McGreal is also the creator of the OER Knowledge Cloud, a repository of more than 1300 scholarly articles and reports on OER and MOOC themes.

Rory is the recipient of several awards including the US-based Wedemeyer Award as a leading distance education practitioner. Others include a senior fellowship from the European Distance Education Network (EDEN); a Leadership in Education award from the Canadian Network for Innovation in Education (CNIE); and a Lifetime Achievement Award, from the Open Education Consortium.

Previously, he was the executive director of TeleEducation New Brunswick, a province-wide bilingual (French/English) distributed distance learning network. Before that, he was responsible for the expansion of *Contact North/Contact Nord* (a distance education network in the remote region of Northern Ontario – serving remote aboriginal reserves and small mining towns). Rory was the founder of the world's first e-learning website for TeleEducation NB and one of the world's first metadata learning object repositories.

His expertise includes evaluations of elearning initiatives, elearning administration, and cost-effectiveness strategies. In addition, he is an expert in the application of OER. As an applied researcher, his investigations have been responsible for the implementation of a mobile device accessible digital reading room. As a Chairholder in OER, he is also active in promoting Open Educational Resources and is a board member of the Open Education Foundation. He has considerable experience as an evaluator of educational software and of implementation of technologically enhanced knowledge initiatives, including studies and reports for CANARIE, Health Canada, the Commonwealth of Learning and other organizations.

## Heather Kanuka

Heather Kanuka's area of research revolves around academic development, focusing on teaching, learning and technology within the higher education sector. Heather's first faculty position was as

Assistant Professor in the Faculty of Education at the University of Calgary, Canada. Heather was appointed as Associate Director for the Learning Commons. This position supported leadership and encouragement for quality, innovative inquiry-learning approaches for curriculum innovation and research, while also providing support for the integration of technology into the learning process, inclusive of blended, online and distance learning. In 2004 Heather was awarded a SSHRC-funded Canada Research Chair in online learning at Athabasca University at the rank of Associate Professor. Athabasca University is a Canadian university specializing in online distance education and one of four comprehensive academic and research universities in Alberta. In 2007 Heather accepted an appointment at the University of Alberta in the Faculty of Education. In this position, Heather was hired as the Academic Director of the Centre for Teaching and Learning and was responsible for providing strategic leadership for teaching, learning and technology, inclusive of blended, online and distance delivery. Currently, Heather is Full Professor in the Faculty of Education, Department of Educational Policy Studies at the University of Alberta.

Heather continues to conduct research in the areas of blended and online distance teaching and learning. Heather's past research focused primarily on how to effectively teach using net-based technology. Her first co-authored book *Learning Technologies in Distance Education for Adult Learners* (1999), focused directly on teaching development in off-campus classrooms. Based on early research findings, Heather's research transitioned into facilitating higher levels of learning in blended and online distance learning environments. Based on her recent research findings, Heather's research has moved into exploring philosophical orientations of teaching and technology. At present, Heather continues to study the philosophical orientations of teaching and technology in higher education, working toward a conceptual framework for how, and why, academics approach their teaching with technology.

## Terry Anderson

Terry Anderson is a Professor Emeritus and former Canada Research Chair in the Centre for Distance Education and the Technology Enhanced Knowledge Research Centre at Athabasca University – Canada's Open University.  Terry has published widely in the area of distance education and educational technology and has co-authored or edited nine books and numerous papers. He is also Editor Emeritus and served as Editor for 10 years for the *International Review of Research in Open and Distributed Learning*, which is the mostly widely read and cited English language, peer-reviewed journal in this field.

Much of Terry's research work revolves around studying interaction amongst and between students, teachers and content. His pioneering work with Randy Garrison on the Community of Inquiry model (1999) investigating social, teaching and cognitive presence has been widely read and serves as theoretical basis for much distance education delivery and research. His development of an Interaction Equivalency Theory (2003) is used to support moving education provision to scale. His work with Olaf Zawacki-Richter produced the edited collection *Online Distance Education Research: Towards a Research Agenda* (2014) that provides expert summary and commentary on the most important distance education research issues. Most recently he has been working and collaborating with colleague Jon Dron on applications of social media to support both formal and informal learning summarized in *Teaching Crowds: Learning and Social Media* (2014). He and Jon Dron have developed a 'boutique" social network.

Terry's books and research articles have, since 2004, been published under open access licenses so as to maximize their availability to all distance education practitioners, students and researchers. Terry was active in provincial, national, and international distance education associations and is a regular keynote presenter at professional and academic conferences.

## Badrul Khan

Dr. Badrul H. Khan, is an author, educator, and consultant in the field of e-learning and educational technology. He received a B.A. in Chemistry and a Ph.D. in Instructional Systems Technology from Indiana University, Bloomington, USA. Early in his professional career, he was a professor and founding director of the Master of Education in Educational Technology at the University of Texas at Brownsville. A few years later, Dr. Khan founded the Educational Technology Leadership graduate cohort program at George Washington University,

Dr. Khan has authored twelve books and over 100 manuscripts in topics related to the fields of e-learning, open and distance education. He was credited with coining the phrase "Web-based instruction" and popularized the concept through his 1997 best-selling book, *Web-Based Instruction*, which paved the way for the emerging field of e-learning. His book, *Managing E-Learning Strategies* has been translated into 17 languages.

Often described as the founder of modern e-learning, Dr. Khan has been honored with numerous awards and worldwide acclaim throughout his career. In recognition of his contributions to the field of e-learning, the Egyptian E-Learning University Council awarded him the title of Distinguished Professor of E-Learning. In 2015, Professor Khan was inducted into the United States Distance Learning Association (USDLA) Hall of Fame.

Khan's E-Learning Framework (http://BadrulKhan.com/framework), which was initially developed in 1997 to address issues pertaining to the successful implementation of e-learning in education and training, has evolved to encompass the design and delivery of effective, efficient and engaging learning across multiple learning environments and contexts. The framework has been adopted by academics and researchers from around the world and applied to multiple modes of instructional delivery, including distance learning, mobile-learning, blended learning, computer-based training, MOOCs, learning analytics and technology supported traditional instruction. Almost 20 years old, Khan's framework remains a valuable tool for evaluating an organization's educational technology readiness and opportunities for growth. It helps stakeholders think through every phase of a new initiative to ensure that desired learning outcomes are achieved.

Dr. Khan has served as a consultant/advisor to e-learning and instructional design related projects for several US federal government agencies, the World Bank, UNDP, NATO, Commonwealth of Learning, Asian Development Bank, Ministry of Education in several countries, and academic institutions and corporations in the USA and abroad. He contributed to the development of United States National Educational Technology Plan and Virtual Educational Policies organized by the White House OSTP and the Naval Postgraduate School.  A sought-after keynote speaker on e-learning and blended-learning, Dr. Khan has delivered numerous keynote addresses at various distance learning conferences in the USA and abroad. He is the host of *Khan's Digital World*, a monthly TV show that addresses critical technological issues in eEducation, eGovernment, eCommerce, eHealth, eArgiculture, and eEntertainment that have implications in all aspects of everyday life.

## Conclusion

In conclusion, innovation in open and distance education is progressing at a fast pace. Charles Wedemeyer was the pioneer of distance education in North America. Others such as Sir John Daniel and Michael Moore have set the groundwork for open and distance education and innovators and researchers have expanded on the implementation of open and distance education for the betterment of society. The development and use of open education resources is being championed by Rory McGreal, which is making education affordable for all. Tony Bates has made a significant contribution to leadership and implementation in open and distance education. The research on Massive Open Online Courses (MOOCs) led by Marti Cleveland-Innes is allowing education to be reached by the masses globally. Badrul Khan's framework for developing e-learning and online learning has influenced the way learning materials are developed and has improved the quality of the learning materials. Terry Anderson and Heather Kanuka have conducted research that have impacted the implementation of open and distance education in a positive way. The variety of expertise and contributions by the North American open and distance education leaders have propagated the successful implementation of open and distance education in North America and the world.

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