



THE IMPACT OF AN ETHICS OF CARE ON THE IRON TRIANGLE IN ODL

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Abstract

There are claims that distance education and in particular open distance learning (ODL) are unique in providing broadened access to higher education at lower costs without compromising quality. While traditional face-to-face higher education is caught in the fixed vectors of quality, access and cost, the so-called 'iron triangle', distance education and in particular, *online* distance education promises to break the 'iron triangle'.

Much of the current discourse is centred on the notion of access and quality with little contemplation of the inter-dependencies between access, quality and cost in the light of often dismal student retention in distance education contexts. Amid increasing public and regulatory scrutiny, changing funding regimes, and increasingly underprepared student populations *and* faculty, ODL institutions spend more and more resources to improve student retention and success without compromising quality or 'closing' the revolving doors. While ODL's commitment to social justice in providing increased access is laudable, providing such access with little reasonable chance of success may actually constitute justice denied or deferred. Focusing just on justice is potentially insufficient and we should possibly move beyond frameworks of justice to frameworks of justice *and* care. The question arises then: *How scalable and cost-effective is an ethics of justice and care in ODL?*

This exploratory conceptual paper approaches the traditional vectors of access, cost and quality (the iron triangle) from the perspective of an ethics of justice and care. From the context of an ODL institution in a developing world context (the University of South Africa, Unisa), this paper questions the central claim of the iron triangle that high quality teaching and learning can be provided to an increasing number of students without raising the cost of provision or lowering quality. The paper briefly explores criticisms of the iron triangle before problematising its underpinning assumptions from the perspective of an ethics of justice and care.

Introduction

Distance education and especially open distance learning (ODL) institutions are generally synonymous with social justice in that they provide access to students otherwise excluded from access to higher education, or those not able to access residential or face-to-face higher education, for whatever reason. While student attrition and failure is of concern to the wider higher education sector, it is of particular concern in distance and ODL contexts (Gaskell & Mills, 2015; Simpson, 2013; Subotzky & Prinsloo, 2011; Woodley, 2004). In an attempt to improve student attrition and success, ODL institutions increasingly allocate more and more resources to support and care for underprepared students *and* faculty (Prinsloo & Slade, 2014). While ODL's commitment to social justice to provide increased access is laudable, providing that access without those students having a reasonable chance of success may constitute justice denied or deferred (e.g., Botes, 2000; Clement, 1996). Some authors (e.g., Noddings, 1999) claim that focusing just on justice is inadequate and that we should move beyond frameworks of justice – 'care often "picks up" where justice leaves off' (Noddings, 1999, p.12). The question then arises: *How scalable and cost-effective is an ethics of justice and care in ODL?*

This exploratory conceptual paper approaches the traditional vectors of access, cost and quality (the iron triangle, e.g., Daniel, Kanwar and Uvalić-Trumbić (2008, 2010a, 2010b) from the perspective of an ethics of justice and care. There are claims that the iron triangle of access, cost and quality is 'broken' and that distance education and online education can achieve high quality teaching while, at the same time, lower cost and widen participation (Daniel, Kanwar & Uvalić-Trumbić, 2010a, 2010b). There are also others who claim that we need to revisit the foundational assumptions and epistemologies on which the iron triangle is founded (e.g., Hülsmann, 2004; 2014; Kanuka & Brookes, 2010; Power & Gould-Morven, 2011; Lane, 2014) and Power and Guild-Morven (2011) suggest that the iron triangle has become 'dated and fundamentally unworkable, an industrial solution in a post-industrial period' (p.24).

From the context of an ODL institution in a developing world context (the University of South Africa, Unisa), this paper firstly questions the central claim of the iron triangle that high quality teaching and learning can be provided to an increasing number of students *without* raising the cost of provision or lowering the quality. It continues by briefly discussing some of the criticisms of the iron triangle before problematising some of the assumptions underpinning the iron triangle from the perspective of an ethics of justice and care.

Problematising the iron triangle

Some claim that 'equity and excellence are not mutually exclusive' (Whiteford, Shah & Nair, 2013), while others feel that 'distance education can achieve any two of the following: flexible access, quality learning experience and cost-effectiveness – *but not all three at once*' (Kanuka & Brooks, 2010, p.69; emphasis added). Power and Guild-Morven (2011) therefore claim that the concept of the iron triangle is 'dated and fundamentally unworkable, an industrial solution in a post-industrial period' (p.24).

Within the context of the changing funding regimes, increasing student debt and dismal student retention and course rates, a number of questions arise: *How do we balance justice and care in relation to cost, accessibility and quality?* How do we balance education as moral practice (Giroux, 2003) with its implied ethics of care, with an ethics of justice with its dominance of rational rule-based accountability and admission regimes? How do we go beyond justice and consider care as a guiding principle when thinking about student retention and dropout in open distance learning contexts? How do we counter claims that ‘justice untempered with care may actually introduce new inequities as it seeks to renew old ones’ (Noddings, 1999, p.1)?

Reconsidering the iron triangle

The three elements of the iron triangle – access, quality and cost – have for many years been the ‘bugbear of education’ (Daniel et al., 2008, p.6). The three points of the iron triangle are not only linked but also interdependent. The iron triangle has two main characteristics namely ‘it may be distorted in different ways’ with different trade-offs between the vectors. Such trade-offs cannot, however, change the second characteristic; namely that the triangle has ‘a fixed length perimeter’ (Power & Gould-Morven, 2011, p.23). According to Daniel et al. (2008, 2010a, 2010b), traditional higher education provision is unable to increase or widen access without affecting cost and/or quality. These authors claim that distance and online education can break the iron triangle.

It falls outside the scope of this paper to discuss the different adaptations and de/reconstructions of the iron triangle. Suffice to point to three examples of authors who question the suitability of the iron triangle (broken or not) to inform thinking about cost, quality and access in the context of distance education provision in the 21st century. After briefly discussing these three examples, I pose a number of questions from the specific context of ODL in a developing world context.

Lane (2014) petitions for an enrichment of the iron triangle and proposes a combination of the iron triangle with the interaction equivalence theorem (Anderson, 2003). Lane’s proposal however relies on a limited and bounded understanding of student success as being dependent on students’ motivation, preparedness and ‘organisedness.’ Lane (2014) does not provide any rationale for his selection of these specific three variables as basis for the notion of a ‘circle of success.’ Compared to other models explaining student success (see the overview by Prinsloo, 2009) and specifically the socio-critical model for understanding and predicting student retention and success developed by Subotzky and Prinsloo (2011), Lane’s proposal ignores the seminal role of *context* and student success as a complex phenomenon that constitutes a rite of passage consisting of mostly non-linear, multidimensional, interdependent interactions at different phases in the nexus between student, institution and broader societal factors.

Power and Gould-Morven (2011) reject the iron triangle on the basis that the model does not ‘associate vectors with specific stakeholders’ groups, nor does he [Daniel] discuss how the needs of faculty, students, and administrators may differ’ (p.25). In their critique, Power and

Gould-Morven (2011) then propose, with no specific justification, that ‘*students* are naturally (sic) most concerned about *accessibility*...., *faculty* are typically defenders of *quality*, whereas *administrators* are tasked with assuring *system cost-effectiveness*’ (p.25). While it cannot be disputed that the different stakeholders may have different interests with regard to cost, access and quality, I find it indefensible to make these mutually exclusive. For example, while access is important to students, surely the quality of the learning experience and the credibility of the completed qualification are also important? It is crucial to situate the cost of learning not only on the side of the institution but also account for costs to students and take cognisance of the increasing concerns about student debt. Based on their proposal, Power and Gould-Morven (2011) conclude that blended online learning design (BOLD) manages to provide increased access without compromising quality or increasing costs.

Hülsman (2014) suggests that any claim of distance education and elearning as ‘the most cost-efficient form of educational provision is very much based on scale economies’, a notion that he deconstructs and rejects. He criticises the iron triangle’s blurring of ‘average cost per student’ and ‘total cost’ (par.15), the impact of the size, diversity and complexity of the programme qualification mix (PQM) and the additional costs when institutions attempt to address diversity in student profiles through different delivery modes. (For a full discussion see Hülsman, 2004, 2014).

In addition to the above enrichments and criticisms, relationships between the different variables impacting on student success necessitate that we question many of the assumptions underpinning the “brokenness” of the iron triangle. For example, students and the institution are co-responsible for success in a dynamic and often unpredictable environment where student habitus, dispositions and context meets institutional (in)efficiency in a dynamic interplay with factors in the macro personal, socioeconomic and political environments of both the institution and students (Subotzky & Prinsloo, 2011). This raises a number of questions such as: How fixed can the vectors of the iron triangle be in such a dynamic and often unpredictable context? And secondly, should ODL in developing world contexts serve social justice by providing increased access and opportunities to often underprepared students by underprepared faculty, it also implies providing increased support to faculty and students in a commitment to uphold quality standards. What are the cost implications of providing access and care? How scalable are higher levels of care? What are the implications of *not* caring or implementing care that is not scalable at cost?

The notions of “access” or “openness” in ODL imply that, depending on context-specific legislative and regulatory frameworks, many students enrolling in ODL don’t necessarily have access to traditional residential higher education, and secondly, are possibly underprepared (like many faculty) for the challenge of higher education and the unique requirements of studying through distance education. This may result in a cohort of students who have been granted *access* in terms of the social mandate of open education, but who often fail or dropout or require additional generic and personal support and care. The additional support rendered to institutions with the aim of optimising students’ chances of success comes at a cost and is often implemented without consideration of the appropriateness, effectiveness or integration

with other institutional initiatives. As funding increasingly follows performance rather than precedes it, ODL institutions have to reconsider the scope and implications of their openness and the cost and scalability of care, without substantively changing their social mandate of doing so.

An ethics of justice and care in ODL: implications for the iron triangle

An ethics of care and an ethics of justice are often positioned as opposites (Botes, 2000) and the relationship between the two concepts have been described as ‘duet or duel’ (Jorgensen, 2007). Gilligan (1982) contends that while these two concepts are often seen and practiced as oppositional and mutually exclusionary, both care and justice have a place in ethical decision making and that ‘the two aspects are *inextricably linked and in constant interaction*’ (Botes, 2000, p.1073; emphasis added). (Also see Flanagan & Jackson, 1987; Joynt & Gomersall, 2005; Katz, Noddings & Strike, 1999).

Justice versus care

An ethics of justice is based on the decisions of an ‘autonomous, objective and impartial agent’ (Edwards, 1996 in Botes, 2000, p.1072) formulating and applying universal rules and principles to ‘ensure the fair and equitable treatment of all people’ (Botes, 2000, p.1072). An ethics of care, on the other hand, focuses on fulfilling ‘the needs of others and to maintain harmonious relations’ (p.1072).

Criticism against an ethics of justice in the health profession is based on the increasing depersonalization, objectification of individuals and the ‘standardisation of all professional activities as part of a quality-control exercise’ (Botes, 2000, p.1072). The principles and defining characteristics underlying an ethics of justice cannot sufficiently address and accommodate the complexities, intersectionality and multi-dimensional nature of individuals and different relations in different contexts. In a certain sense, ODL as moral practice and public good is already a counter-narrative to the question of desert, which proposes that some students deserve access to higher education, while many prospective students may have to accept that they do not have access. In the context of an industrialised model of ODL and the increasing demand for access to higher education, this raises the question: *how practical and scalable is the notion of care?* How do we scale and implement an ethics of care in distance education institutions with thousands of students, in the context of different, complex combinations of admission requirements, presentations, diverse assessment practices and credentialising? Also, how many opportunities should students be provided to pass a particular module? ODL institutions will often take extra care towards students deemed more at risk and provide them with additional opportunities, while the same scope of care may not be awarded to students who just miss getting a distinction. What are the implications of being selective with regimes of caring? When does our selectiveness in caring actually constitute injustice? Are we still committed to justice without caring?

Care and equity

Noddings (1999) moots the interesting point that ‘when a just decision has been reached, there is still much ethical work to be done’ (p.16). In the context of providing equitable educational opportunities, caring means investigating and providing a range of reasonable alternatives and resources. Noddings (1999) argues that treating everyone alike does not necessarily mean providing everyone with what they want, but rather what they need. An equitable and caring approach means that ‘instead of assuming a false universalism, it recognises deep and perhaps irremovable differences – differences which counsel against sweeping solutions that affect people’s lives directly and preclude their effective use of self-chosen strategies’ (p.19). What are the implications for standardised curricula and assessment strategies? How scalable is the care suggested by Noddings (1999)? How scalable and cost-effective is providing a range of reasonable alternatives and resources?

Care, justice and power

The understanding and practices of caring, justice and fairness are furthermore embedded in historical and present socio, cultural, economic, technological, political, and environmental power relations (Subotzky & Prinsloo, 2011). Legal and policy frameworks have always been informed by religious, cultural, gender and class power relations and used to sanction dominant beliefs and societal power structures (Apple, 2004, 2010; Bernstein, 1996). When our understanding and practices of justice and care are understood in terms of relations of power, it raises questions regarding how our current strategies address student dropout and failure. An ethics of care seems to acknowledge the unequal power relations and commits itself to being transparent regarding its intentions and processes, whilst also considering the often unforeseen implications of an ethics of justice.

Positive rationality versus an extended communicative rationality

The concept of rationality proposes that findings can be justified through argumentation. An ethics of justice is founded on a positivistic or modernistic rationality that, for the sake of objectivity, reduces complexities to formulate universally applicable rules and principles. Opponents to an ethics of justice moot the notion that moral and social phenomena are complex, dynamic and multifaceted, making it almost impossible to predetermine definitions of fairness and justice. A socio-critical understanding of student success or failure illustrates the relational complexity of different interdependent and often mutually constitutive variables, which almost make it impossible to formulate minutely detailed rules, and regulations that encompass every possible combination and scenario. Subotzky and Prinsloo (2011) therefore point to the importance of the relationship between students and the institution and ‘*actionable mutual knowledge*’ (p.183). In the context of widening access, to what extent does our commitment to justice and fairness *exclude* caring from our processes and policies?

Reductionism versus holism

‘The reductionism approach is, in all probability, the Achilles heel of the ethics of justice, as it is not plausible for the sake of objectivity to reduce ethical problems in order to relegate values and emotions’ (Botes, 2000, p.1074). An ethics of care suggests that a phenomenon to be studied in its entirety should also consider the impact and causal power of structures. A case in point is acknowledging the socio-economic legacy systems and how they shaped and still shape students’ preparedness for higher and open distance learning. Institutional admission criteria or criteria informing the scope and practices of educational triage therefore need to take cognisance of the causal historical legacies of social structures (Prinsloo & Slade, 2014). Do our rules and regulations acknowledge the complexity of student (dis)engagement? To what extent and how does widening access impact on our levels of care and our ability to consider individual student context in a holistic manner?

Most literature on the difference and possibly mutually exclusive nature of an ethics of justice and an ethics of care refer to the fact that an ethics of justice is based on the claim that it is possible to formulate guidelines or criteria that are universally valid and applicable *regardless* of context. On the other hand, an ethics of care emphasises the importance of context and that contextual factors may, at times, require non-adherence to guidelines or criteria originating from an ethics of justice. (See Prinsloo & Slade, 2014 for their discussion on the importance of context in an ethics of care).

(In)conclusions

This exploratory conceptual paper engaged with the traditional vectors of access, cost and quality from the perspective of an ethics of justice and care. Claims that distance education and ODL in particular can widen access, without compromising on quality or increasing costs, were critically explored and found more complex than the current rhetoric implies. Providing access to an increasing number of students who need additional support and care, has direct implications on the cost and scalability of care. If justice without care constitutes injustice or justice deferred, we need to (re)consider the cost and scalability of care.

Engaging with the proposed notion of the ‘brokenness’ of the iron triangle (Daniel et al., 2008) through the lens of an ethics of justice and care raises important considerations and contestations. In the context of the historical roots of ODL as serving social justice, we need to question many of our assumptions not only about the linkages and inter-dependencies between cost, quality and access, but also question the purported claims of the ‘brokenness’ of the iron triangle.

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