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Study of UK Online Learning

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EXECUTIVE SUMMARY

1. This study was commissioned by HEFCE in order to gain a broad overview of the current UK provision of higher education (HE) level online distance learning (ODL) and to advise the Online Learning Task Force¹ where further work is required to provide a fuller understanding of this sector. For the purposes of the study ODL was defined as any course, at any HE academic level, delivered to students at a distance from the host institution, which has a significant component delivered to students online.
2. Desk research, to explore the number and type of ODL courses currently offered, was undertaken in parallel with a series of interviews with key institutions to investigate business models and pedagogical and institutional approaches. A survey was also developed to capture data on financial value, staffing and the scale of ODL provision; however, this was not completed by a sufficient number of organisations to give a representative dataset and therefore the results of the survey are not included in this final report.
3. Following initial research, it became apparent that there were no existing bodies of data on ODL provision in the UK; therefore, the desk research focused on collecting information from the web. Following a review of web-based course aggregation services, the British Council's Education UK site was selected as the primary source for the desk research. Using this service, the study explored trends across approximately 400 predominantly online courses offered by over 100 HE and further education (FE) institutions. Separately, an additional 175 ODL courses offered in partnership with 17 commercial providers were identified.
4. From the data collected a number of trends were observed:
 - the vast majority of ODL offered by HE institutions is at postgraduate level;
 - courses provided in partnership with commercial organisations are more evenly spread across the HE academic levels, but taken in conjunction with those offered directly by institutions the emphasis remains on postgraduate provision;
 - almost all of the ODL courses identified could be described as continuing professional development (CPD). This was especially true of those courses provided by institutional/private sector partnerships which were heavily biased towards business-orientated provision;
 - a significant number of level 4 and level 5 courses were identified that could potentially provide a route into HE;
 - although the number of level 4 courses was relatively high (approximately one third of the total), most of these were short standalone courses, typically offering 10 or 20 credits towards an HE award, which, when framed in terms of study hours, represented much lower volume than ODL offerings at levels 5 and above which tended to be award-bearing courses.
5. Following the high-level overview of course provision, the study explored the websites of 133 HE and FE institutions and 17 commercial providers to investigate how easy it was to find detailed information about ODL courses. The quality of these websites varied greatly, but generally it was not easy to find ODL courses through routine searches. This problem was compounded by a lack of clarity in the terminology used by institutions to describe their ODL programmes. The study also found that there is no reliable or accurate consolidated source of information about ODL courses offered in the UK that is readily available to students, or other parties, interested in finding ODL programmes, and much of the information on ODL currently remains 'hidden' in labyrinthine institutional websites.
6. The study attempted to review the cost of ODL courses to students. However, the timescale of the project, the absence of consolidated information and the sheer range of disciplines and

¹ The Online Task Force was established by the Department of Business Innovation and Skills in 2009 (see announcement at: <http://www.hefce.ac.uk/news/hefce/2009/taskforce.htm>)

awards available made it impracticable to establish any substantive trends. Overall, the gathering of financial information was challenging as institutions either did not have easy access to this type of data or did not collect financial metrics in sufficient detail to extract readily information specific to ODL courses.

7. As well as building a quantitative overview of the UK provision of ODL, the study undertook a qualitative, case-study based enquiry of how institutions are approaching the development and delivery of ODL courses, with a focus on identifying success factors and common barriers. Over the course of interviews, with eight HE and FE institutions and one commercial provider, a number of common themes emerged that might reflect generally held views across the sector. These included:
 - a clear message to not be too focused on the technology involved in delivering ODL; e.g. the technology was described as 'vital but not central';
 - recognition of the requirement for low student-tutor ratios, and regular feedback and assessment points to ensure that students are engaged and retained;
 - the need to address the challenge associated with 'change management'; e.g. supporting the changes necessitated by the need to encourage academic staff to shift emphasis away from content dissemination towards facilitating more independent and activity-based learning;
 - the importance of understanding the expectations of ODL students in full-time work and appreciating that their motivations, needs and aspirations may differ significantly from traditional campus-based students. The inherent advantages of ODL as a mode of delivery for students in full-time work was identified;
 - a consensus that in order to strategically expand the provision of high quality ODL courses, a robust institutional infrastructure for developing, delivering and maintaining courses is essential. A key consideration is the extent to which institutions provide central support to facilitate such developments. In many cases, ODL offerings have evolved from a 'cottage industry' style approach with developments led wholly at departmental level. While this approach was seen to have many benefits, not least ensuring academic quality and promoting innovation, it was also seen as a challenge and a potential barrier to expanding provision;
 - the challenge of embedding sustainable practice without stifling innovation.
8. The key message to emerge was that institutions felt the substantive challenge was not the pedagogical model they chose to use for ODL, but planning the configuration of the supporting infrastructure, resources and business models required to support the development and delivery of ODL programmes. Addressing these structural issues was seen as a prerequisite for success in expanding provision.
9. Three of the interviews were undertaken with institutions who delivered ODL in partnership with a commercial provider. The level of 'overlap' between the partners varied, but in two cases anecdotal evidence suggested that a successful relationship had developed. Significantly, despite in some cases the commercial partner providing the majority of the resource and support for the ODL courses, it was considered by all parties to be important to students that the courses were 'rooted' in a traditional university. One institution commented that students of their partnership programmes sometimes phoned the university to check the validity and association of the course with the university before enrolling.
10. Based on the interviews carried out, there was a general sense of optimism that if the market is assessed properly and business models are well designed then ODL can continue to grow as a sustainable mode of delivery for HE. In fact all interviewees and all respondents to the survey indicated that they expect to expand their provision of ODL courses in the next five years.

Summary of recommendations

11. This study was undertaken over a short timeframe (approximately 30 days between mid December 2009 and the end of February 2010), and it has not, therefore, been possible to

capture all aspects of ODL being delivered by HE and FE institutions. Nevertheless, the research has been extensive enough to inform a number of recommendations, which have been grouped into four themes as follows:

Theme 1: Size and shape of the current market

12. A taxonomy of ODL courses needs to be established in order to better reflect the wide range of student experiences that currently fall under the broad title of ODL. Further work is also needed to collect comprehensive data about ODL provision in the UK. Existing data collection exercises, such as Higher Education Statistics Agency (HESA) returns and other nationwide systems, such as the National Student Survey, need to be reviewed to ensure that data collected in the future provides HEFCE and others with an accurate overview of ODL provision to a level of detail that enables informed decision-making.

Theme 2: Improving discoverability

13. Identifying ODL courses on the web can be a challenge as they are often 'hidden' in complex institutional websites. Where details are available, they frequently don't provide the full range of information a potential online student needs in order to make a decision regarding whether or not a course meets their requirements. There is a need to support institutions in improving their websites to mirror the searching methods of potential students and to provide more relevant information on course offerings. There is a need also to ensure that the international visibility of UK ODL activities in major search engines, such as Google, is optimised.

Theme 3: Sharing best practice

14. Pedagogic innovation is crucial to developing high-quality ODL courses; however, in order to expand provision it appears that institutions have a more immediate need for guidance on successful business models that take into account student support, marketing and administrative requirements. Details of successful institutional infrastructure arrangements to support the expansion of ODL should be disseminated. This process could be enhanced through the targeted provision of existing resources and themed forums or events. Alongside this, consideration should be given on how best to support new professional roles, such as online tutors and ODL programme managers, which are beginning to emerge as institutions expand their provision of ODL.

Theme 4: Market intelligence

15. While some institutions have a good understanding of the aspirations of their ODL students, the availability of more market intelligence in this area would be of benefit across the sector. The vocational trend in ODL provision creates a feasible framework for gathering market intelligence, especially for those courses offered at postgraduate level. More information on the provenance, motivations and aspirations of this student body should be sought to inform those aspects of UK ODL that need targeted support. In addition to this, more detailed information on the position of the UK's ODL provision within the international market is needed to indicate potential areas for expansion.
16. This study was not able to determine the financial success of the UK's current ODL provision, and more work will be needed to obtain financial information appropriate for analysis. It is, therefore, recommended that a further study be commissioned to explore the financial models that have been developed by some of the leading UK ODL providers. We also suggest that the survey developed for this study be adapted and reissued to senior members of institutional staff who have access to the high-level financial information needed to complete it accurately.
17. In summary, there appears to be significant activity in the UK HE and FE sector developing and delivering ODL programmes, with many institutions keen to expand their offerings in this area. With targeted support from HEFCE, and other relevant agencies and institutions, the UK will be in a strong position to sustain its excellence and grow its market share of ODL provision in coming years.

1 KEY FINDINGS AND RECOMMENDATIONS

THEME 1: SIZE AND SHAPE OF CURRENT MARKET

1. Collect structured data on ODL courses

A key finding of the study is that currently there appears to be almost no formal collection of data related to HE level ODL activity. If the UK is to fully exploit the pedagogical and commercial opportunities in this area and grow its market share by 2015, it is crucial that HEFCE has a clear understanding of the volume and nature of the UK's current and future HE level ODL provision.

Part of this process should involve developing a simple taxonomy of ODL courses, perhaps similar to the ones used in recent publications by Sloan-C² or UCISA³, in order to better reflect the wide range of student experiences offered by courses currently grouped together under the single category of ODL. For this mode of delivery, it is particularly important to be able to track fully-online courses as these courses are likely to have the widest potential market.

We recommend that:

- 1(a) a simple taxonomy of ODL is agreed to act as a framework for data collection;
- 1(b) the HESA data collection process is refined to collect ODL-specific information;
- 1(c) other national methods of data collection, such as the National Student Survey⁴, are reviewed to see if they would be suitable to collect metrics on ODL.

THEME 2: IMPROVE DISCOVERABILITY

2. Improve the 'discoverability' of ODL courses

A key finding of the study is that identifying ODL courses offered by UK HE and FE institutions on institutional websites, aggregation services and the web generally is not always easy. Furthermore, when found, the information available often does not provide the full range of information a potential student, or employer, looking for part-time online study opportunities needs to make a decision regarding whether or not a course meets their requirements

For improvements to be made in this area a better understanding is needed of students' and employers' requirements for ODL courses. In addition, more information is required to establish what initial search methods they employ to identify suitable learning opportunities. For example, do individuals search by subject, mode of delivery, institution or award and, while recognising that all of these factors will be important in choosing a course, which of them are critical?

There are significant gains to be made by improving the discoverability of all courses on institutional websites, aggregation services and the web more generally. While the study found examples of good practice, a significant number of institutional websites do not provide course-specific search facilities. Many of those that do provide such functionality do not provide sufficient granularity of search options; for example, few sites enabled a search based on mode of delivery, which is an important consideration for students seeking to study online. The study also found that, generally, ODL courses offered in partnership with commercial providers were easier to find on the web when using search engines, such as Google, than equivalent courses offered directly by HE/FE institutions.

² I.E. Allen & J Seaman, *Learning on Demand: online education in the United States, 2009*, The Sloan Consortium, Jan 2010, p. 4 (<http://www.sloan-c.org/publications/survey/pdf/learningondemand.pdf>)

³ Universities and Colleges Information Systems Association (UCISA) 2010 questionnaire, question 3.9 (<http://www.ucisa.ac.uk/groups/ssg/surveys.aspx>)

⁴ National Student Survey: <http://www.hefce.ac.uk/learning/nss/>

We recommend that:

- 2(a) a review is undertaken and, if sufficient data does not already exist, further research is conducted to survey current students (and their sponsors) studying ODL courses in the UK to find out more about why courses were chosen; what search methods were employed to identify courses; and to identify the factors deemed most important when searching for a suitable course;
- 2(b) potential new target audiences for HE level ODL courses are identified and research undertaken to determine the search methodologies and search behaviour of these groups;
- 2(c) any findings of such research is widely disseminated to HE and FE institutions to assist them with improving the marketing and discoverability of their ODL courses;
- 2(d) The Joint Information Systems Committee (JISC), HEFCE and other agencies continue their work to disseminate and promote good practice in website design and web-based marketing, including advising on improving visibility of course offerings in major search engines, such as Google, and using appropriate aggregation services;
- 2(e) JISC continue work developing technologies and specifications, such as XCRI⁵, to make it easier for course providers to exchange course-related information. Any such specifications should be able to identify important characteristics of ODL courses in order to promote sharing of information and to increase the discoverability of such courses;
- 2(f) where appropriate, agencies operating course aggregation services should be supported and encouraged to develop their services to enable better search functionality for ODL courses;
- 2(g) a consultation is undertaken with the UK ODL sector regarding the creation of a comprehensive sector-wide resource and aggregation service to better promote the UK's offer of ODL and improve discoverability by potential students and their sponsors.

THEME 3: SHARING BEST PRACTICE

3. Promote successful business models

The study identified the culture of academic institutions and their strategic focus as the major factors in the successful expansion of ODL. The majority of the institutions interviewed reported that, while technology and pedagogical models are critical, these areas are now relatively mature and well supported and do not represent significant barriers to the expansion of ODL activities. Therefore, while it is essential to continue to support and promote innovation in these areas in order to sustain the UK's position of excellence, it is student and staff support, programme development, administrative processes and business strategies that are currently seen by many as the barriers to the growth of the UK ODL sector.

A further finding of the interviews was that all institutions who had engaged in some kind of ODL partnership, both those which had been successful and those that had failed, reported that they had learned valuable lessons from such partnerships, which they had subsequently applied to developing successful institutional ODL business activities.

We recommend that:

- 3(a) a review is carried out and, if appropriate, further research is undertaken to capture and disseminate information about successful institutional approaches to scaling-up the provision of ODL, with a focus on student support, business processes and marketing, as well as continuing to support innovation in pedagogical practice;
- 3(b) JISC, HEFCE and other appropriate agencies continue to support projects, develop resources, provide advice and recommendations and host events that support institutions in these areas;

⁵ XCRI: eXchanging Course-Related Information (<http://www.xcri.org/>) is a JISC-funded, UK-oriented project to establish a specification to support the exchange of course-related information.

- 3(c) JISC and HEFCE consider offering targeted consultancy to institutions at the early stages of offering ODL programmes, and to those seeking to scale-up their provision, to support the development of business activities in these areas.

4. Providing advice on institutional infrastructure

The study found that institutions currently seeking to expand strategically their ODL provision were looking to centralise some elements of their ODL activities, in particular student support, development of supporting resources, learning technology support, and general management and oversight of such programmes. Key motivations for centralising such activities were to improve efficiency and to ensure consistency of identity and quality across the range of the institutions' ODL programmes. This trend is part of the process of ODL maturing within these institutions and represents a move away from self-contained 'cottage industry' style approaches, based at departmental level, to a more coordinated institutional approach. However, all interviewees emphasised that any process of centralising support must be sensitive to the discipline-specific needs of individual programmes and must ensure that it does not stifle innovation. There was a consensus that it was essential for faculties to maintain ownership of programmes to ensure academic integrity.

- 4(a) Building on existing support and provision in this area from JISC and HEFCE, we recommend that support is continued to help institutions implement change and improve the efficiency of the development and delivery of their ODL programmes. Specific areas it would be useful to explore are:
- (i) successful practice for providing educational/pastoral support to online students;
 - (ii) quality control/oversight of ODL programmes;
 - (iii) recognising new roles to support the development and delivery of ODL programmes;
 - (iv) facilitating and embedding innovation through the sharing of successful practice at institutional ODL events/forums;
 - (v) the production and control of supporting resources, such as induction and user guides;
 - (vi) tutor training and other CPD for staff employed to develop and deliver ODL programmes;
 - (vii) advice on pedagogical design, with a particular focus on best practice solutions to common ODL challenges and opportunities.

5. Communication and sharing of current practice

To our knowledge, while there are many sector-wide forums and events covering technology-enhanced learning (TeL), there is currently no forum focused specifically on HE level ODL. This study has found that the majority of the barriers and successes in the provision of ODL are replicated in institutions across the sector, making it sensible for knowledge to be shared. A further observation is that as the delivery of ODL programmes begins to expand within institutions, new roles begin to emerge. While some roles, such as learning technologists, are already recognised and supported by professional bodies and development opportunities within the sector; those working in other roles – such as business managers, marketers, programme managers, project managers, and specialists in ODL student support – may benefit from more targeted support.

We recommend:

- 5(a) asking ODL practitioners if establishing a national event/conference or other forum focused specifically on this mode of delivery would be of value;
- 5(b) investigating newly emerging roles within the ODL sector and assessing how well existing resources, training and development opportunities support such roles;
- 5(c) reviewing existing outputs from JISC, HEFCE and other groups to identify core resources related to ODL and disseminating these, in a highly targeted manner, to relevant staff.

THEME 4: MARKET INTELLIGENCE

6. Explore the motivations and aspirations of current ODL students and their sponsors

The clearest trend to emerge from this study is the predominance of ODL courses with a vocational focus. Of these courses, by far the largest group are postgraduate-level programmes aimed at professionals, but there is also a potentially significant grouping of foundation-level undergraduate programmes. Evidence from the interviews indicates that the needs and expectations of ODL students are distinctly different from traditional campus-based undergraduate students. This being the case, it would be valuable to undertake further research to explore the motivations, aspirations and requirements of these groups of students, both to ensure the UK's ODL course offerings meet student needs, and to inform the strategic expansion, development and marketing of new programmes.

We recommend:

- 6(a) reviewing existing research and data on student motivations and experiences, and undertaking a gap analysis to identify further research required to obtain a better understanding of the motivations and experiences of ODL students;
- 6(b) reviewing existing methods of collecting data on student experiences, such as the Postgraduate Taught Experience Survey⁶, to assess if existing data collection methods are suitable for collecting data relevant to ODL courses;
- 6(c) commissioning student-focused market research to:
 - (i) establish the demographics, existing qualifications and geographical location of current ODL students;
 - (ii) explore the motivations and aspirations of ODL students in their choice of course and the mode of delivery;
 - (iii) better understand what students' priorities are when selecting an ODL course in terms of institution, syllabus, delivery methods, award/accreditation and cost;
- 6(d) review existing literature and, if necessary, commission new research to investigate employers' attitudes to ODL and to identify training needs that might be best met by ODL;
- 6(e) further exploring vocational ODL offerings at level 4 and level 5 with a view to establishing how successful these courses are as a 'pathway' to higher level qualifications, whether students of these course have any special needs or requirements, and to establish if the expansion of this market could be a potential mechanism for workforce re-skilling and widening participation.

7. Undertake a more focused study to assess the financial value of ODL

This study attempted to collect data on the financial value of current provision of ODL courses in the UK. However, within the very short time-scale of the study it was not possible to gather enough financial data to identify any trends. Quantifying the financial value of the UK's current provision of ODL is problematical for a number of reasons:

- 1. Financial data needs to be collected against an agreed definition of the types of ODL courses;
- 2. Many institutions are reticent to share information on the financial value of their activity in this area as they consider it to be commercially sensitive;
- 3. In many HE institutions ODL courses are delivered by departments, so while individuals with institution-wide roles, such as directors of online learning, have a broad understanding of the ODL offerings, they often do not have readily to hand detailed information on the financial value of such activities;
- 4. Some institutions interviewed commented that they collect financial information in such a way that it is not possible to separate specific details on ODL courses.

⁶ Postgraduate Taught Experience Survey (PTES)
(<http://www.heacademy.ac.uk/ourwork/supportingresearch/postgraduatework>)

In order to gain a better understanding of the financial value of the UK's ODL provision, we recommend that:

- 7(a) a targeted financial study is commissioned to interview key players successfully delivering ODL programmes and to explore further their business models;
- 7(b) data is collected on the proportion of ODL programmes being paid for by individuals and the proportion paid for by employers in order to establish if there are any trends that might assist with developing and marketing new ODL programmes;
- 7(c) HEFCE/JISC consider re-promoting the survey designed by this study (see Annex C), or a revised version, to senior members of institutional staff who have access to high-level financial information.

8. Further investigation of the opportunities of commercial partnerships

The study established that, for the institutions interviewed, the nature of partnerships with commercial partners varied considerably but it appears that in some cases they are very successful. The strategic use of partnerships, including those between HE/FE institutions and commercial partners, could be an efficient way of accelerating an expansion of ODL provision within the UK.

We recommend:

- 8(a) Further exploring the business models implemented in these partnerships, including:
 - (i) detailing the nature of the partnership arrangements;
 - (ii) capturing information on the financial value of these models to both parties;
 - (iii) describing the staffing, infrastructure and processes that need to be put in place by an HE or FE institution in order to manage such partnerships.

9. Gain an overview of UK ODL in an international context

Currently the ODL market in the UK is concentrated around courses in business, law, medicine, science and education. It would appear that most institutions initially develop their ODL offerings based on existing academic expertise and through those members of academic staff who were/are prepared to experiment with this mode of delivery. A danger inherent in this approach is that often not enough attention is placed on the extent of the potential market for a course, and so institutions risk a number of 'false starts' before finding a suitable market for their programme(s).

At both institutional level and across the sector a better understanding of the international market for ODL would be of great value.

We recommend:

- 9(a) That further market intelligence is gathered to give a clearer picture of the position of UK ODL in an international context. This research should include:
 - (i) an overview of the overall international market for HE level ODL courses;
 - (ii) identification of key competitors;
 - (iii) identification of potential target audiences;
 - (iv) identification of areas where key UK players plan to expand their activities in the near future;
 - (v) identification of relevant gaps in the international market that the UK is in a strong position to fill.

2 BACKGROUND

2.1 Remit of the Study

In 2009, the Department of Business Innovation and Skills established an Online Learning Task Force⁷.

The Online Learning Task Force's terms of reference are to:

... make recommendations to the Higher Education Funding Council for England and other relevant agencies and institutions regarding the development of excellence in online learning, to support UK Higher Education in exploiting fully its pedagogical and commercial opportunities, with the aim of the UK HE sector sustaining its excellence and growing its market share in such provision by 2015.

To support the work of the Task Force, JISC, on behalf of HEFCE, commissioned the Technology-Assisted Lifelong Learning⁸ (TALL) team, based at the University of Oxford Department for Continuing Education, to undertake this study of online distance learning provided by and for UK institutions in the HE sector. The aims of the study were to:

- provide an overview of the current UK offer of online and distance HE courses to undergraduates, postgraduates and professionals (including CPD) - noting key players and models of provision;
- illustrate this overview with a number of case studies (to understand the financial value and student numbers involved);
- provide details regarding common barriers to, and motivations for, the growth of HE online and distance learning in the UK, and where possible to suggest where and how these barriers can be overcome and these motivations better supported;
- advise the Online Learning Task Force where further work is required to provide a fuller understanding of online learning.

2.2 Timeframe and Methodology

The study was undertaken over 30 days between mid December 2009 and the end of February 2010. A combination of desk research, a survey and interviews with key institutions were used in order to ensure sufficient data was gathered to provide an overview of the scale of provision of online and distance learning within the UK, while at the same time providing the opportunity to further investigate institutional motivations and barriers to success of expanding such provision. The results and findings of the quantitative desk research and survey are presented in section 3 "Current Provision of Online Distance Learning in the UK" and the findings of the qualitative, case-study based enquiry are presented in section 4 "Case Study Profiles" and section 5 "Institutional Experiences of Online Distance Learning".

2.3 Scope of Study

Given the broad remit and the short timeframe of the study it was necessary to define closely the parameters of the research in order to collect the most useful data in the limited time available. The following key points should be noted:

- The desk research undertaken to gain a broad overview of the current scale of provision of online and distance learning in the UK used the British Council's Education UK online course aggregation service as a data source. This source data had a number of limitations, which are

⁷ Online Task Force Announcement (<http://www.hefce.ac.uk/news/hefce/2009/taskforce.htm>)

⁸ Technology-Assisted Lifelong Learning (TALL) unit (<http://www.tall.ox.ac.uk>)

described in more detail in section 3 of the report; but the most significant one is that the source only included courses available to international students.

- Because of the large number of online and distance learning courses offered by the Open University, following consultation with the JISC project manager, these were excluded from Part 1 of the desk research in order to allow more detailed analysis of the online and distance learning offerings of the rest of the UK HE and FE sector. The Open University was included in Part 2 of the desk research and was interviewed for the study, so the institution is represented in the other areas of the study.
- Based on the findings of the desk research, key players in the sector were identified and interviews were undertaken with nine institutions from the HE, FE and commercial sector.
- The online survey was designed to collect information on the type and scale of provision of ODL within institutions and the financial value of current offerings from a wider range of institutions than it was possible to interview within the timeframe of the study. Because the survey questions required institution-wide knowledge of this specialist field and there was limited time in which to promote the survey, it was sent only to the relatively small audience of the Heads of e-Learning Forum mailing list.

Readers should bear in mind that the findings and trends outlined in this report are based on the limited research undertaken by this study and, as outlined in the recommendations, further research is needed in order to gain a full understanding of the UK online distance learning sector.

2.4 Definitions

The following terms are used throughout this report:

Online Distance Learning (ODL)

For the purposes of this study, the term online distance learning is defined as any course, at any HE academic level, delivered to students at a distance from the host institution, which has a significant component delivered to students online. This definition excludes traditional distance learning courses that do not use online technology as a mode of delivery but does include blended or hybrid learning course that combine a majority of online study with some face-to-face attendance.

Technology-enhanced Learning (TeL)

This term is used to refer to all forms of learning that are supported or facilitated by technology. In the HE and FE sector this term is most often used to describe face-to-face courses that are supported by a Virtual Learning Environment (VLE) or other technologies. In this report the term TeL is used to describe the use of technology to support the teaching of face-to-face courses as distinct from ODL.

Academic Levels

The study uses the Quality Assurance Agency for Higher Education (QAA) Framework for Higher Education Qualifications⁹ (FHEQ) levels to categorise ODL courses. Examples of how typical HE awards map to these levels is provide for reference in Annex A, Appendix 1.

For this study, Online Distance Learning (ODL) is defined as:

Any course, at any HE academic level, delivered to students at a distance from the host institution, which has a significant component delivered to students online.

⁹ The QAA Framework for Higher Education Qualifications in England, Wales and Northern Ireland, August 2008, p. 10 (<http://www.qaa.ac.uk/academicinfrastructure/FHEQ/EWNI08/FHEQ08.pdf>)

3 CURRENT PROVISION OF ONLINE DISTANCE LEARNING IN THE UK

3.1 Introduction

The UK provision of HE level ODL courses has increased significantly during the seven years since the demise of the centralised UK e-University¹⁰ project. Over this period, many HE and FE institutions, as well as a small number of commercial providers, have been expanding the number of ODL programmes they offer. However, in HE institutions in particular, much of this growth has taken place on an ad hoc basis, often at the departmental level, and this has led to a situation where it is difficult to assess the overall level of ODL activity across the sector.

Part of the remit of this study was to provide an overview of the current UK offering of HE level ODL programmes for undergraduates, postgraduates and professionals (including CPD). Initial research undertaken by the project team looked to establish what current data on this sector was available. Following consultation with the Higher Education Statistics Agency (HESA)¹¹, it was established that no data relating specifically to ODL courses is currently collected or can be extracted from existing HESA data. In addition, enquiries to organisations, such as the Observatory on Borderless Higher Education¹², and comprehensive literature searches revealed that there were no existing publications on the UK ODL market. Given that no existing data could be drawn upon, the study team used a combination of desk research and a survey, supported by interviews with a number of institutions, in order to establish the scale and type of ODL activity currently taking place in the UK.

This section of the report outlines the desk research undertaken to gather quantitative information relating to the current provision of ODL in the UK and presents the findings. The desk research was undertaken in four stages: Part 1 gathered information on the volume of current ODL provision, the nature of this provision and the number and types of organisations involved; Part 2 focused on the ways that potential students and employers can discover details of online provision; Part 3 collected information on the fees payable by students for studying ODL programmes; and Part 4 developed a survey to capture information on institutions' range of ODL courses, student numbers, the financial value of this mode of delivery and future plans for expansion. A detailed description of the desk research methodology is provided in Annex A.

3.2 Part 1 Desk Research: Size and shape of current UK provision

To gain a holistic picture of the current provision of HE level ODL in the UK, the project undertook desk research to investigate the offerings of both HE and FE institutions, and commercial providers working in partnership with these institutions. Given the short timeframe of the study it was not feasible to search methodically the websites of individual institutions, so we elected to use web-based course aggregation services. Following a review of such services – including Unistats¹³, UKPASS¹⁴, Prospects¹⁵ and Hotcourses.com¹⁶ – the British Council's Education UK¹⁷ site was selected as the primary source for the desk research. The Education UK site was chosen as it was found to be easy to use and offered both the option to search for courses on the basis of the 'Type of attendance' being 'Distance/Online' and to search for undergraduate and postgraduate level courses, including undergraduate courses offered by FE institutions.

We believe that the dataset produced by the study, while small, is one of the most comprehensive available. However, the following important caveats regarding the data collected from the Education UK site should be observed:

¹⁰ UK e-University, Third Report of Session 2004-05, House of Commons Education and Skills Committee, 3 March 2005 (<http://www.publications.parliament.uk/pa/cm200405/cmselect/cmeduski/205/205.pdf>)

¹¹ HEFCE's analytical services group confirmed on 5 February 2010 that there was no way of identifying online distance learning from existing data collected by HESA .

¹² The Observatory on Borderless Higher Education (<http://www.obhe.ac.uk/>) provides strategic information to enable institutional leaders and policy makers to make informed decisions relevant to their existing and/or future transnational higher education initiatives.

¹³ Unistats online course aggregation service (<http://www.unistats.com>)

¹⁴ UKPASS online course aggregation service (<http://www.ukpass.ac.uk>)

¹⁵ Prospects online course aggregation service (<http://www.prospects.ac.uk>)

¹⁶ Hotcourses online course aggregation service (<http://www.hotcourses.com>)

¹⁷ Education UK online course aggregation service (<http://www.educationuk.org/>)

- The Education UK service filters data to display only courses available to international students;
- The data on the Education UK site does not claim to be comprehensive and is collected from third party sources that require institutions to provide details of their courses.

ODL delivered directly by UK HE and FE institutions

The Part 1 desk research used the Education UK site to search for the 'Distance/online' course offerings of 308 UK HE and FE institutions; 113 of these institutions (37 per cent) were found to offer one or more 'Distance/online' course.

It should be noted that the data collected on 'Distance/online' courses outlined above exclude courses offered by the Open University. The main reason for omitting the Open University's entries was that, due to the limited time available to undertake the study, it was felt that it would take a disproportionate amount of time to categorise and analyse the entries from the Open University (which amounted to more than half the offerings of the other 113 HE and FE institutions offering ODL courses combined). Also, given the Open University's position as the leading provider of distance learning in the UK, it was felt important to take into account its ODL activity, but in such a way that did not skew the overall picture of offerings from other UK HE and FE institutions.

In February 2010, the Open University was contacted directly and asked approximately how many ODL courses it currently offers and how these courses are delivered; it reported the following provision:

- 257 'web supplemented' courses (online participation optional);
- 600 'web dependent' courses (participation required through interaction with content and/or online communication tools);
- 95 'fully-online' courses.

ODL delivered in partnership with commercial providers

In order to gain a full picture of all the current ODL provided in the UK, we also investigated the course offerings of 28 commercial providers who work in partnership with HE and FE institutions to deliver HE level ODL courses. Seventeen of these providers were found to offer HE level ODL courses, and in total these providers offered 175 HE level ODL courses.

Key facts:

The study identified over 2,600 HE level online and distance learning courses offered by, or on behalf of, UK HE and FE institutions. These included:

- 1,528 courses offered by 113 HE and FE institutions; of which 510 were identified as being delivered online (including blended learning);
- 952 courses offered by the Open University; of which 600 were dependent on the web and a further 95 were delivered fully online;
- 175 courses offered in partnership with commercial partners.

While the data collected cannot claim to be totally comprehensive, it does act as a useful basis to explore general trends. The following section discusses key trends identified in the data collected. (Note that the Open University courses are not included in this analysis.)

3.3 Part 1 Desk Research: Key findings

This section presents the key findings of the Part 1 desk research.

ODL delivered directly by UK HE and FE institutions

The Education UK course aggregation service returned 1,528 courses delivered by distance and online learning. A useful feature of the Education UK service is the ability to extract data and further divide the results into courses delivered by 'distance learning' and those delivered 'online'. In this context 'distance learning' is most likely to mean traditional correspondence courses but it also includes other non-web based delivery media such as television, video and CD-ROM. The term 'online' relates to the predominant mode of delivery but includes courses delivered purely online (i.e. without any requirement of attendance) as well as blended learning courses which combine online delivery with some requirement for face-to-face attendance.

Of the 1,528 'Distance/online' courses identified, 510 were categorised as being delivered 'online' and 1,017 were categorised as being delivered by 'distance learning'. Figure 1 illustrates the number of online and distance learning courses provided directly by UK HE and FE institutions, broken down by delivery method and HE academic level.

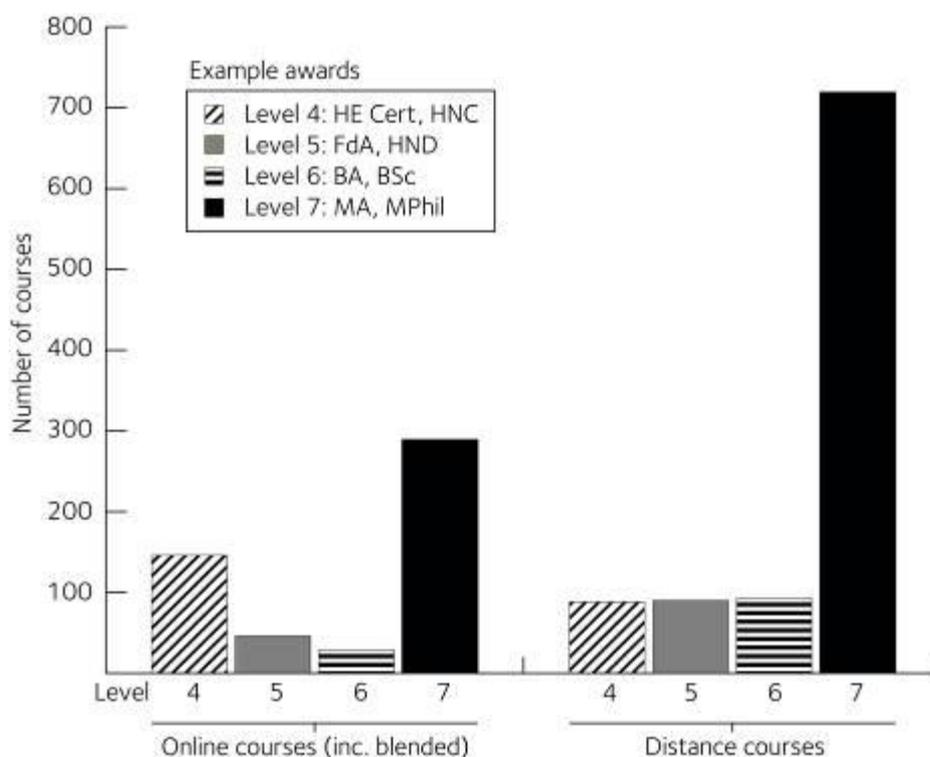


Figure 1: Number of online and distance learning courses provided directly by UK HE and FE institutions, broken down by HE academic level

Figure 1 shows that currently approximately two thirds of online and distance learning courses are offered by 'distance learning' and about one third are delivered 'online'. For the courses delivered 'online', the graph also shows the emergence of a trend towards predominance of course offerings at HE levels 4 and 7.

The 510 courses delivered 'online' can be further divided into those requiring some face-to-face attendance and those that don't:

- 86 were described as 'online with attendance', i.e. blended learning;
- 393 were described as 'online without attendance';
- 31 were described as just 'online'.

Figure 2 illustrates how the 510 courses delivered 'online' are broken down by attendance requirement and HE award level.

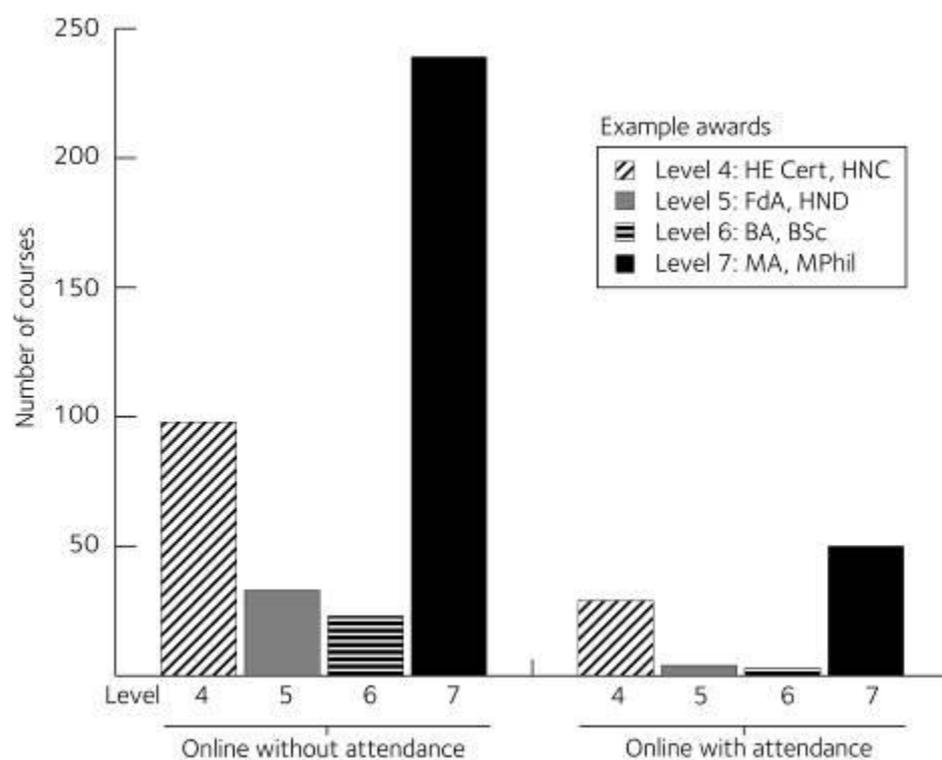


Figure 2: Online courses provided directly by UK HE and FE institutions, broken down by attendance requirement and HE academic level

Figure 2 shows that most online courses, approximately 83 per cent, do not require attendance. Given that all these courses are available to international students, this is perhaps not surprising. Although, from the data collected, it is not possible to obtain further information about the amount or nature of attendance required, it is likely to take the form of some kind of summer school or a point at which students have to sit a formal exam at a specified location. Figure 2 also shows that there is a similar distribution of courses between HE academic levels 4-7 for courses both delivered with and without a requirement for attendance.

Drilling further into the data collected on the 424 courses delivered online without attendance shows that Masters level courses, in particular MAs and MScs, are the most common awards, followed closely by postgraduate diplomas. It is worth noting that, while activity at level 4 seems high, the majority of these courses are short standalone courses, typically offering between 10 and 20 credit points towards an HE award. In terms of number of courses therefore, level 4 courses represent a significant proportion of offerings; but in terms of study hours, academic effort and potential income, they are much less significant than the equivalent amount of courses offered at level 7

Figure 3 maps the ODL courses delivered online without attendance against a simplified version of the Joint Academic Coding System¹⁸ (JACS) subject groups. This graph illustrates that the majority of ODL courses are in disciplines closely related to professions, and further sampling of the names of some of the individual awards, particularly those offered at level 7, demonstrates this further. Examples of some of the ODL courses found included:

- MSc in Forensic Science for Practitioners
- MSc in Construction Project Management
- LLM in Commercial Law

¹⁸ Further information about JACS is available from: http://www.hesa.ac.uk/index.php?option=com_content&task=view&id=158&Itemid=233

- BSc Honours Degree in Quantity Surveying
- Pg Dip in International Commercial Arbitration

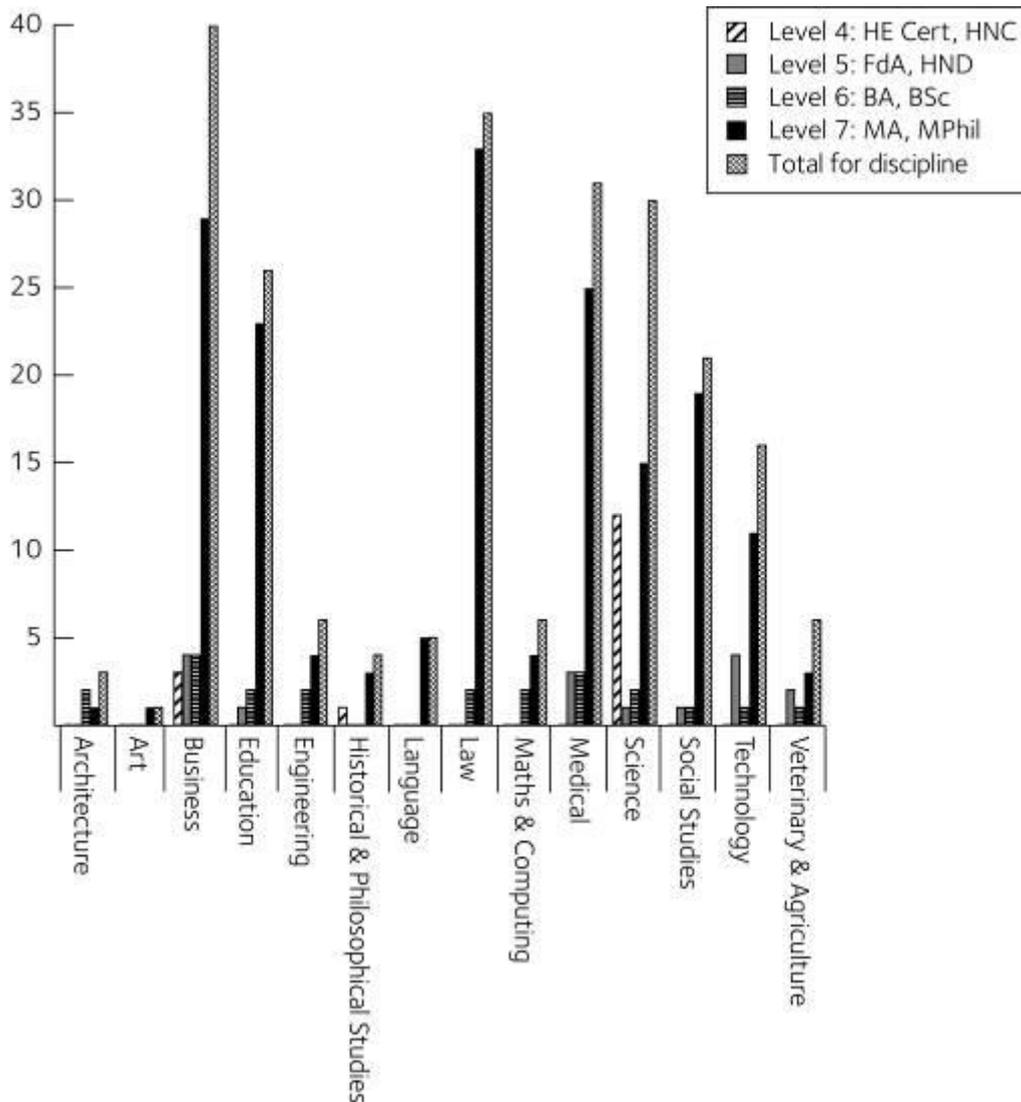


Figure 3: Online courses¹⁹ provided directly by UK HE and FE institutions, broken down by subject area and HE academic level

Key fact:

The majority of the HE level ODL courses offered directly by UK HE and FE institutions are either at level 4 (approximately 25 per cent) or level 7 (approximately 60 per cent). Many of the courses provide specialist training tailored to specific occupations/professions.

ODL delivered in partnership with commercial providers

As outlined above, in order to gain a full picture of all the current ODL provided in the UK, we also investigated the course offerings of 28 commercial providers who work in partnership with HE

¹⁹ Note courses identified only as 'credits towards an HE award' without defining a subject area have not been included in Figure 3.

institutions to deliver HE level ODL courses. Seventeen of these providers were found to offer HE level ODL courses and in total these providers offered 175 HE level ODL courses. Figure 4 illustrates how the courses identified were distributed across HE award levels.

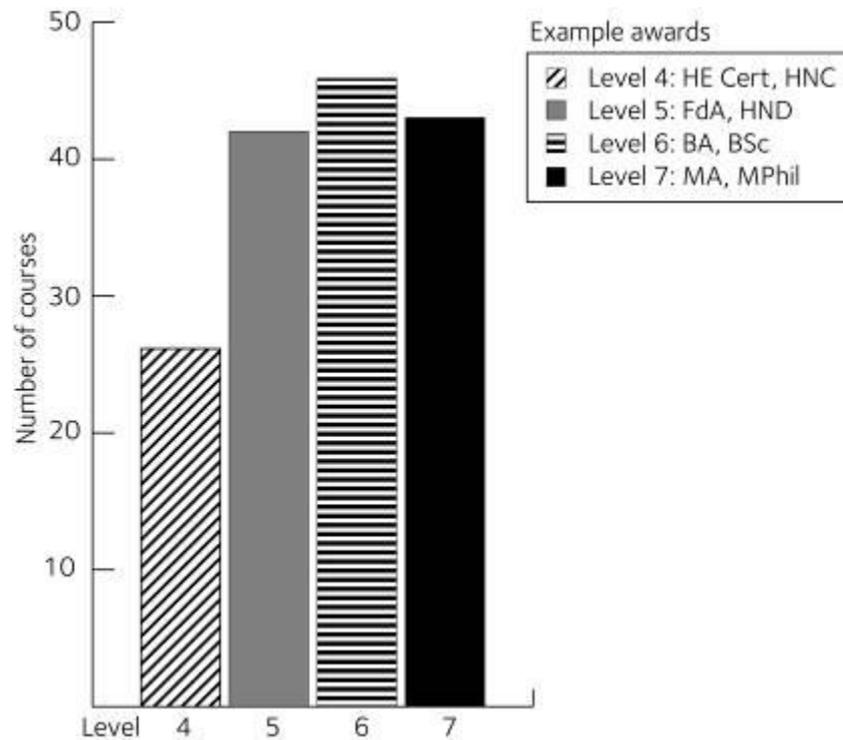


Figure 4: Online courses delivered in partnership with 17 commercial providers, broken down by HE academic level

Immediately apparent is the relatively even spread of courses across the HE award levels, compared to the distribution of ODL courses offered directly by HE and FE institutions. However, it was noted, during the data collection process, that the range of courses offered in partnership with commercial providers varied significantly from one partnership to another. For example, some of the partnerships only offered courses at HE award level 7 whilst others only offered them at levels 5 and 6.

Figure 5 illustrates the ODL courses delivered in partnership with commercial providers, broken down by subject area and HE academic level. Like the ODL courses offered directly by HE and FE institutions, there is a focus on subject disciplines closely related to professions. By far the largest volume of course (59 per cent of offerings) are the subject area 'Business' with other areas of significant activity in the subject areas of 'Medicine', 'Law' and 'Maths and computing'. A common feature of all these subject areas is a need for professionals working in these disciplines to regularly update their skills and knowledge. If designed well, ODL courses can be quicker to update and deliver to large audiences than equivalent face-to-face courses, making them a good candidate for delivering CPD in these fast moving fields.

Key fact:

ODL courses offered by commercial providers working in partnership with UK HE and FE institutions are much more evenly spread across the HE academic levels than programmes offered directly by institutions. Almost 60 per cent of HE level courses offered in partnership with commercial providers are in the field of 'Business'.

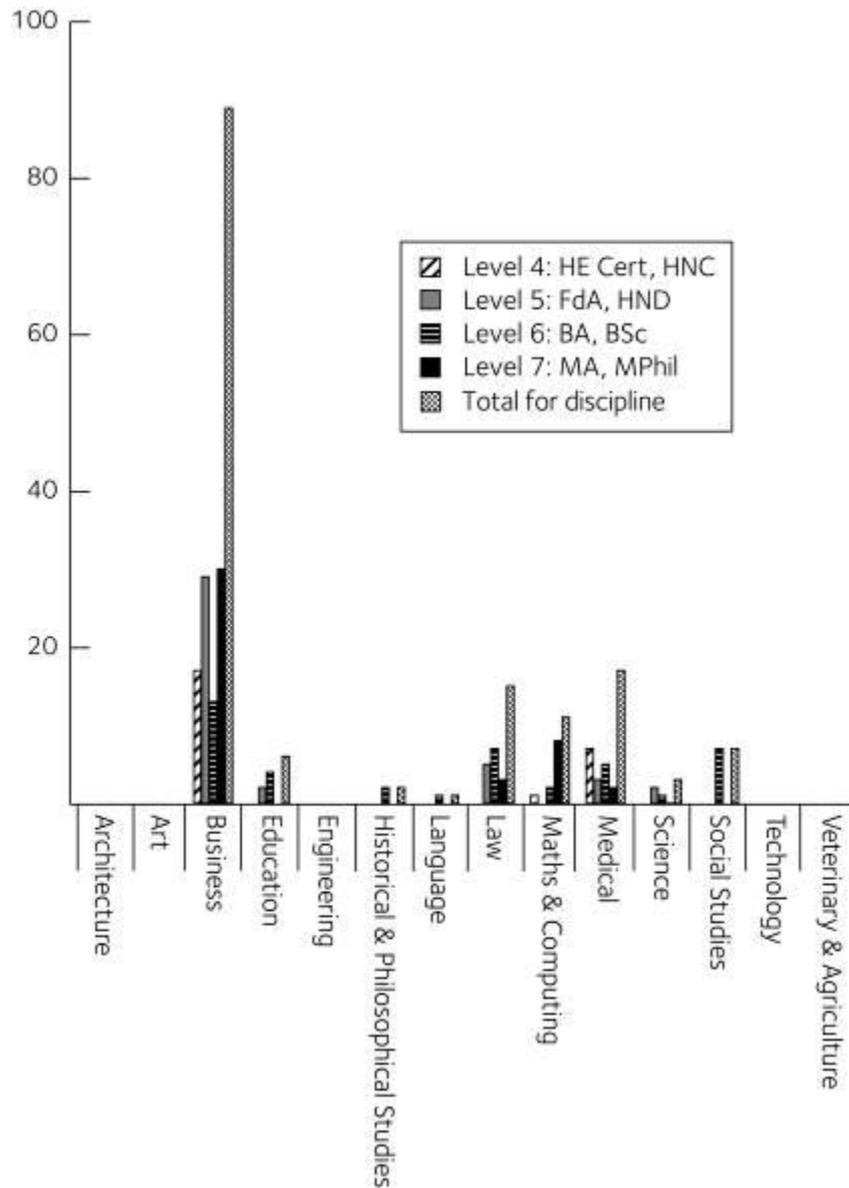


Figure 5: Online courses delivered in partnership with 17 commercial providers, broken down by subject area and HE academic level

Overview of the current offering of ODL in the UK

Figure 6 combines the data collected on HE level ODL courses offered directly by HE and FE institutions with the data collected on courses offered in partnership with commercial providers, to give an overall picture of the current offering of ODL courses in the UK. The graph clearly demonstrates the predominance of postgraduate level offerings, with over half of the courses identified being offered at level 7.

Key fact:
Over half of the UK's current offer of ODL courses is at postgraduate level.

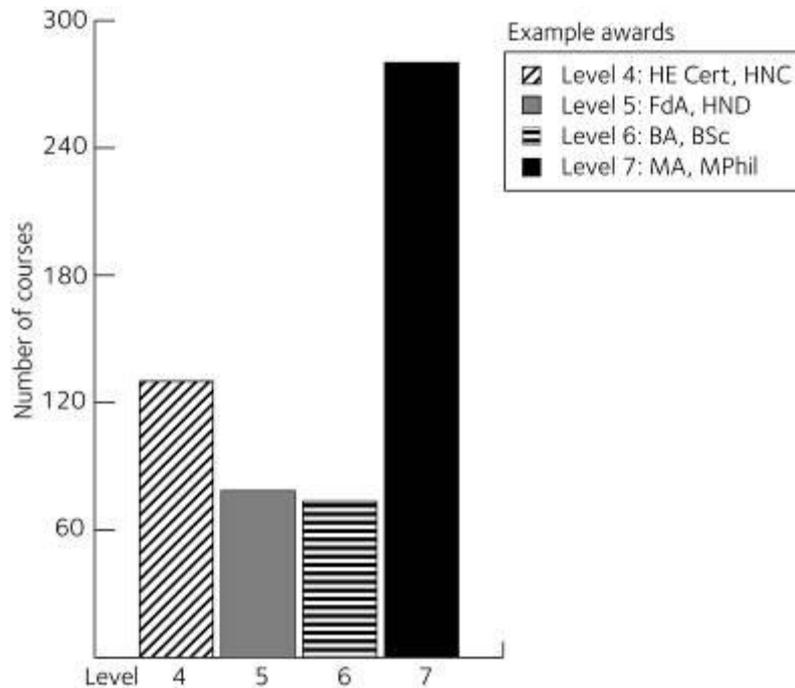


Figure 6: Online courses provided directly by HE and FE institutions and in partnership with commercial providers, broken down by HE academic level

3.4 Part 1 Desk Research: Summary and discussion

The Part 1 desk research undertaken has established that the UK HE sector currently provides a significant number of online and distance learning opportunities, with over 2,600 courses identified, between one third and a half of which are delivered online. The most significant trend to emerge is the predominance of postgraduate level programmes with a focus on providing specialist training tailored to specific occupations and professions. The high number of postgraduate level courses may be due to a number of factors including:

1. Students attending these types of course can see their value both in financial and career development terms, i.e. there is a quantifiable benefit in gaining these types of qualification.
2. Employers are likely to sponsor employees to attend such courses where they see a tangible benefit to their business activities.
3. Well paid professionals, or their sponsors, are likely to have funds available to pay for professional development courses; therefore creating a viable market for such programmes.
4. The flexibility of study inherent in ODL is convenient for students undertaking professional development whilst in full-time employment.
5. The well educated, motivated adult learners likely to be undertaking postgraduate level programmes might be the most suitable students to study online effectively.
6. These types of course do not overlap with traditional campus-based undergraduate provision, which is at the academic 'heart' of the UK HE sector, and are possibly easier to establish in this new mode of delivery.

As discussed in more detail in section 5 of this report, these 'professional' students often have very different expectations to those of a traditional campus-based student. If the ODL market continues to expand following this emphasis on 'professional' courses, the character of the ODL student body may become increasingly distinct from that of campus-based students. We could be seeing the emergence of a parallel form of HE as a result of this particular mode of delivery.

Also worth noting is a small but significant amount of activity in the provision of level 4 courses and level 5 foundation degrees. For individuals who have not yet studied for a HE qualification, and who

are looking to study whilst working, ODL could provide an appropriate option. It could also be a useful career development or re-skilling path for individuals seeking to move up the career ladder or to change direction. Like postgraduate provision, all of the 19 online foundation degrees identified by the study were in 'vocational' subjects such as textiles, law, police studies and educational administration.

A further finding of the study was the low level of provision of online undergraduate degrees, especially provided directly by institutions. This could be for a number of reasons including:

1. The length of undergraduate degrees compared to Masters level courses, in terms of study hours, and the associated high cost of creating ODL versions of them.
2. There may not be market demand for online undergraduate degrees.
3. In many institutions, it is possible that there may be concern over diluting the character and reputation of the undergraduate degree, which is often considered to be a broad life experience and not simply an academic qualification. It is also possible that taking the type of course that has come to symbolise what 'Higher Education' means in terms of traditional values, and changing its mode of delivery and pedagogic approach, could create a major challenge and cause friction within institutions.

Certainly, more research is required to explore the aspirations of potential students for level 5 and 6 ODL programmes, as the market for these does not seem as developed as that for level 7 courses.

It was beyond the scope of this study to investigate the business strategies of commercial providers working in partnership with HE and FE institutions, but the Online Learning Task Force may find value in further exploring whether there are significant differences in target markets for ODL courses offered in partnership with commercial partners, compared to courses offered directly by institutions. In particular, there would be value in identifying areas where partnerships with commercial partners are operating successfully and which might offer a useful model for the strategic expansion of the provision of ODL within the UK.

3.5 Part 2 Desk Research: Discoverability

To gain an insight into the visibility and discoverability of ODL opportunities on the web, this part of the desk research was carried out in three parts. Parts 2A and 2B explored the discoverability of ODL courses on the websites of:

- 113 HE and FE institutions identified in Part 1 of the desk research as delivering some form of ODL;
- 20 other HE and FE institutions, selected at random, who returned null results in Part 1 of the desk research;
- 17 commercial providers identified in Part 1 of the desk research as delivering some form of HE level ODL in partnership with an HE or FE institution;

and Part 2C explored the general visibility of the UK's ODL offerings on the web.

All searches were undertaken from the perspective of a potential student, or their employer, seeking to study an ODL course. To keep this part of the desk research feasible, we restricted our search time to five minutes for each website. This seemed a fair representation of the time a prospective student might spend searching for a course, based on the assumption that if you can't find what you are looking for on a website within five minutes, then any information not found is effectively 'invisible'.

Annex A provides full details of both the searches undertaken and the information recorded for the desk research undertaken to explore Google and the institutional websites.

The section below reports on the findings of the Part 2 desk research and discusses the reasons why it is so challenging to find details of ODL courses on institutional websites.

3.6 Part 2 Desk Research: Key findings

The discoverability of ODL courses on HE and FE institutional websites

The institutional website is very important as a 'shop window' for promoting courses to potential students. For example, provenance information, collected from over 1,000 students attending the University of Oxford Department for Continuing Education's online short courses during the first term of the 2009/10 academic year, indicated that 57 per cent of students found the course they enrolled on from the University's website, compared with 16 per cent who found the course in a search engine and 0.5 per cent who found their course via an aggregation service.

The initial options or search facilities provided on the homepage²⁰ of a website are critical for assisting potential students to find a suitable course. In Part 2A of the desk research, the websites of 133 HE and FE institutions were visited and explored from the perspective of a potential ODL student. The first three questions asked were:

- Does the website mention online or distance learning on the homepage?
- Does the website have a search facility for courses on the homepage?
- Does the course search facility offer an option to search by mode of delivery without entering a subject?

Figure 7 presents the results of these questions.

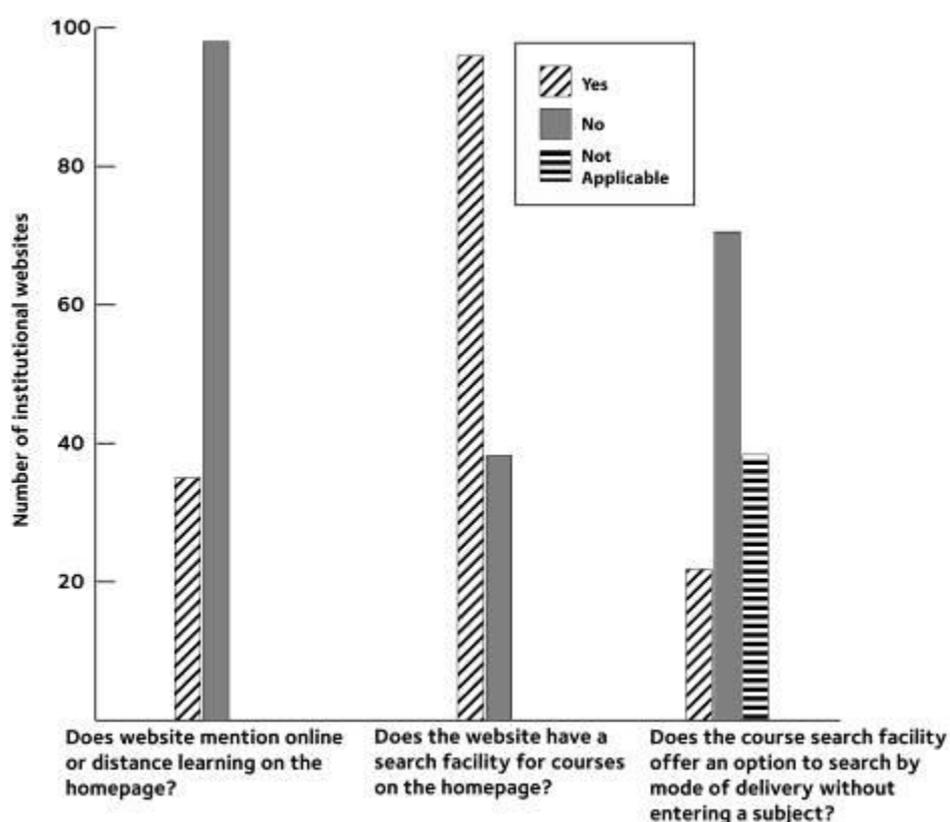


Figure 7: Results of initial investigation into the search functionality offered by HE/FE institutional websites

Across the websites explored, the majority did not mention online or distance learning on their homepage. This is probably not surprising given that 'real estate' on homepages is at a premium and for many institutions ODL is a relatively niche activity. It was surprising, however, that almost a third of

²⁰ For the purpose of this desk research, the homepage was considered to be either the institution's homepage or a main index page one click down where the homepage was of a graphical nature and contained no, or little, textual information.

sites didn't allow users to search specifically for courses, i.e., their keyword search system harvested pages from across the entire website. In these cases, search results are often of a very low quality, particularly when a search term includes a word such as 'online' that is used in a range of contexts. In addition, of the sites that did have course search facilities, approximately three quarters did not allow a search by mode of delivery. Such a search option is of particular importance to prospective ODL students, especially if they are based overseas or are working full-time and can't attend a face-to-face course.

Next the terminology used by institutions to describe their ODL courses offerings was explored. Figure 8 summarises the results.

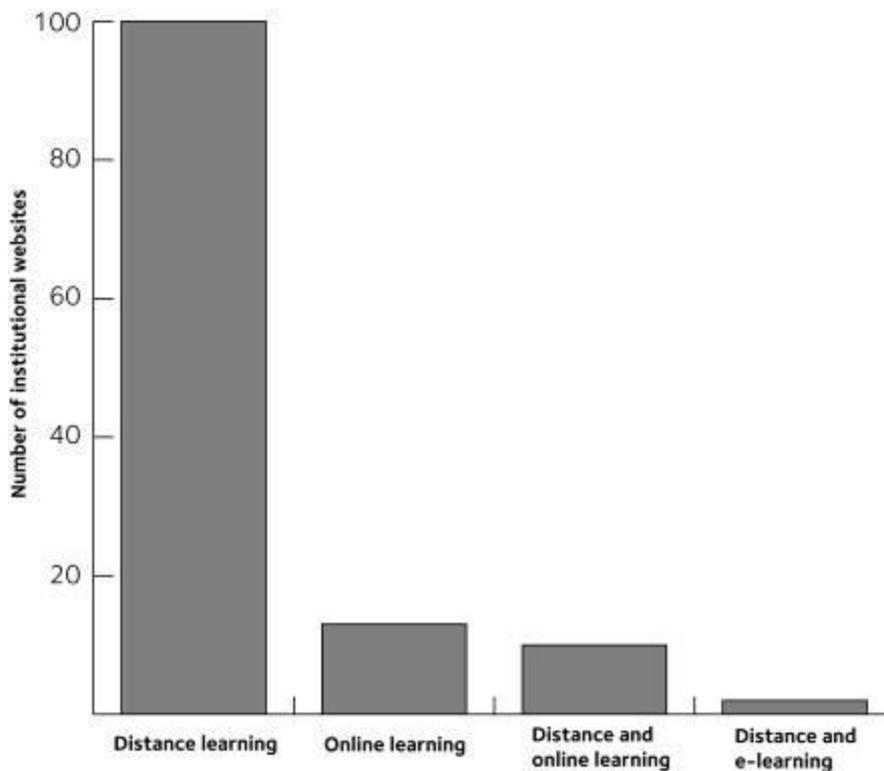


Figure 8: Terminology used to describe ODL courses on institutional websites

As Figure 8 clearly demonstrates, 'distance learning' is by far the most common term used by HE and FE institutions to describe their ODL courses. The use of this terminology tends to reflect a general view, in most institutions, that courses delivered online are a subcategory of distance learning. However, this choice of terminology has the potential to hide courses delivered online in the shadow of more traditional distance learning formats. We suspect that most students seeking to study an online course would use the search term 'online' rather than 'distance' to search for an ODL course and, where all online courses are described on an institutional website as 'distance learning', suitable course offerings may not be returned for the search.

The final element of the Part 2A desk research was to see how many of the ODL courses identified in the Education UK aggregation service in Part 1 of the desk research could be found on the relevant institutional website, and how many other ODL courses not detailed in the Education UK site could be found in a five-minute search. In over 50 per cent of cases it was not possible to find all the courses that the Education UK aggregation service had returned. Similarly, many of the institutional sites returned significant amounts of ODL courses that the Education UK aggregation service did not reveal. Whilst the existence of a significant number of additional courses will be, in part, explained by the filtering applied to the Education UK site (i.e. only courses available to international students are listed), we also suspect that the quality of the data from any one of these sources is not very comprehensive. In effect, much of the information potential students require in order to identify ODL learning opportunities is currently buried deep within complex institutional websites.

The discoverability of ODL courses on commercial provider websites

Commercial partner websites were generally easier to use and information about ODL courses could be found much faster than on the websites of HE and FE institutions. One of the main reasons for this is that these organisations are far less complex and their websites specialise in promoting ODL courses, rather than the full range of activities of an HE or FE institution. Most of the commercial partner sites did not have a course keyword search facility; however, because of the relatively low number of courses available from any single provider and because of the very narrow range of discipline offered, this did not impede searching.

The key terminology used on the commercial partner websites to describe ODL courses was found to be similar to that used by HE and FE institutions, i.e. a predominance of the term 'distance learning' and some use of the term 'online'. The commercial partners also introduced other terminology not used on the websites of HE/FE institutions such as 'home learning/study', 'open learning/study' and 'flexible learning'. These terms are far more descriptive of the benefits of the mode of delivery and could also be terms used by potential students when searching for ODL courses.

Key fact:

'Distance learning' is the most common term used by HE/FE institutions and commercial providers in the UK to describe ODL courses on their websites.

Overall quality of information on ODL courses available from websites

To give a very basic overview of the quality of the 133 HE/FE and 28 commercial provider websites investigated, they were each scored out of 5 on ease of use (5 being a needlessly complex site and 1 being very easy to use). In tandem with this, we also scored the quality of information found on ODL courses out of 5 (with 1 being very comprehensive and 5 being very limited). Adding these scores together gave us a simple quality scale for each of the 161 websites (the lower the score the better the quality of the website). The results were converted to percentages to allow comparison between the institutional and commercial provider websites, and are presented in Figure 9.

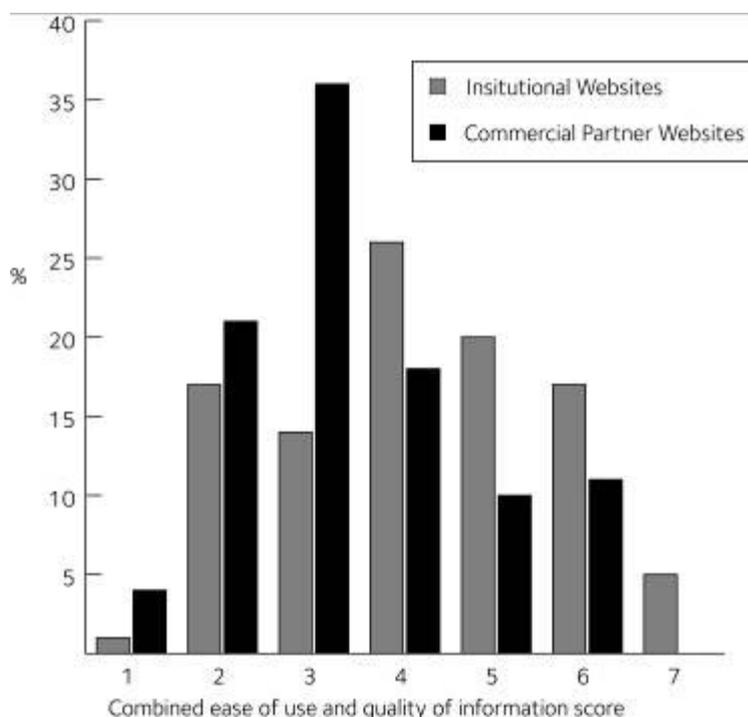


Figure 9: Institutional and commercial provider websites graded by 'ease of use' and 'quality of information' (a lower score indicates a better quality website)

Whilst this was very much a subjective measure of quality and the opinion of only one person, it does demonstrate that, while the partner sites scored slightly better than the institutional sites, the majority of websites are not currently promoting ODL courses very elegantly.

Global visibility of UK ODL

If ODL delivered by UK providers is to remain at the forefront of the global education market then its discoverability needs to be assessed in a global context. One way of doing this is by maintaining a high ranking in international search engines. While it was beyond the scope of this study to undertake detailed research in this area, the results of some very simple searches, undertaken using the search engine <http://www.google.com>, are included to highlight the overall international visibility of the UK's offerings.

Twelve search strings²¹, such as 'online courses' and 'UK university courses online', were entered into the search engine and details of any UK-based HE/FE institutions or commercial providers appearing in either the top ten 'normal' or top ten 'sponsored' links were recorded. Figure 10 presents the results of five of the searches undertaken and Table 1 provides a summary of the names of the organisations that appeared in the results of all 12 searches. (Note that organisations are listed in Table 1 alphabetically, not in order of the ranking of their prominence in the search results.)

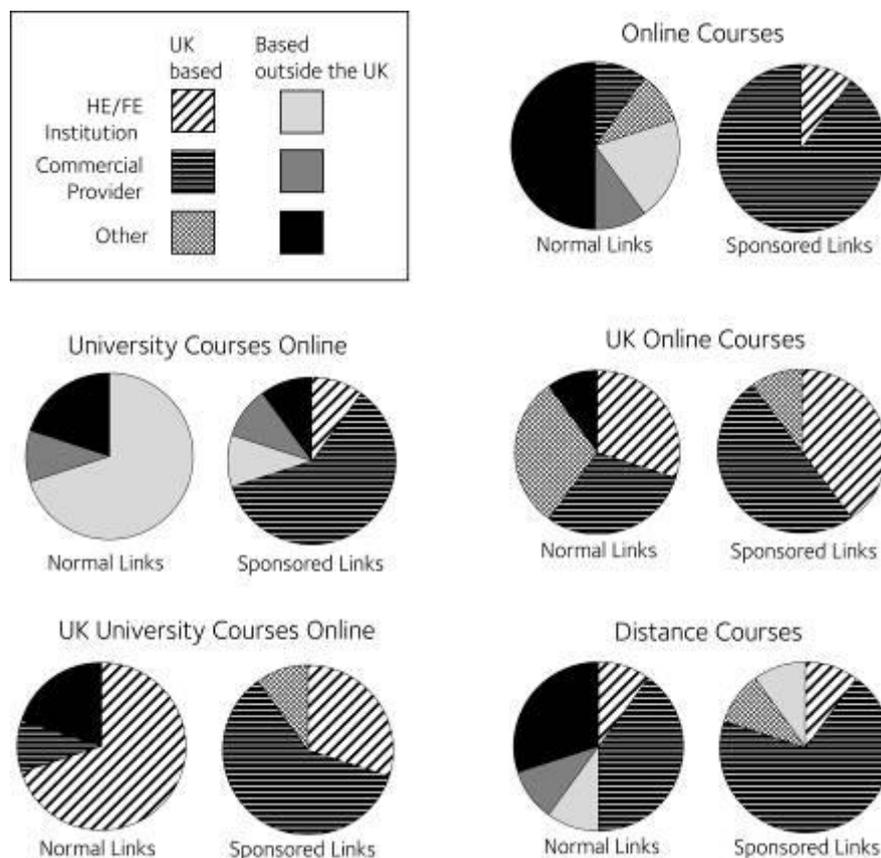


Figure 10: Summary of results of the first ten 'normal' and 'sponsored' links returned from five searches using <http://www.google.com> (undertaken on 12 February 2010)

²¹ The following 12 search strings were used for Part 2C of the desk research to investigate the visibility of the UK's ODL course offerings on <http://www.google.com>: 1. 'online courses', 2. 'UK online courses', 3. 'distance courses', 4. 'e-learning courses', 5. 'university courses online', 6. 'UK university courses online', 7. 'Professional development courses online', 8. 'UK professional development courses online', 9. 'Degrees online', 10. 'UK degrees online', 11. 'Foundation degrees online', 12. 'UK foundation degrees online'.

Non-sponsored 'normal' links	
HE/FE Institutions	Commercial Providers
<ul style="list-style-type: none"> • University of Cambridge International Examinations (CIE) • University of Derby • University of London • Open University • University of Oxford - Department for Continuing Education • Sheffield College 	<ul style="list-style-type: none"> • Distance Learning Centre • Elearn UK • ICS • Kaplan Open Learning • learndirect/Ufi • Promethean Learning • RDI
Sponsored links	
HE/FE Institutions	Commercial Providers
<ul style="list-style-type: none"> • University of Bedfordshire • University of Central Lancashire • University of Derby • University of London • Open University • The Robert Gordon University (Aberdeen Business School) 	<ul style="list-style-type: none"> • Brighton School of Business and Management • First Choice Learning College • Home Learning College • ICS • Kaplan Open Learning • RDI • Study from Home

Table 1: Summary of results from searches using <http://www.google.com> (undertaken on 12 February 2010)

The key findings of these simple searches, as illustrated by the charts in Figure 10, are that:

- for many of the generic search strings, such as 'online courses' or 'university courses online' the UK had very low visibility in the 'normal' top ten results but was well represented in the 'sponsored' links;
- the addition of 'UK' to a search string returns very different results;
- the UK's ODL offerings were much more visible when the search term 'distance course' was used compared to the search term 'online course';
- generally, UK-based commercial providers were more visible than HE/FE institutions in both the top ten 'normal' and top ten 'sponsored' links.

It should be noted that modern search engines use ingenious methods to target marketing at individuals, and it is likely that repeating these searches from different locations would return different results. For example, it is probable that the predominance of UK-based organisations in the sponsored links is an effect of Google identifying the UK-based IP address of the PC being used to undertake the search. It is this aspect of the way in which search engines now operate that makes assessing international discoverability such an intricate task. Nevertheless, the wide variation of results obtained by using different search terms in these simple searches highlights the need to find out more about the search behaviour of potential international ODL students, in particular to identify what emphasis they place on aspects such as subject, location, award and institution.

3.7 Part 2 Desk Research: Summary and discussion

The key findings of the Part 2 desk research are that:

- the term 'distance learning' is by far the most common term used by both HE/FE institutions and commercial providers to describe ODL course on their websites;
- the widespread use of the term 'distance learning' by UK-based institutions is mirrored in the visibility of UK-based ODL courses in global search engines; for example, a search in Google

for 'distance learning' places a number of UK offerings in the top ten results, while no UK offerings are represented in the top ten results when using the term 'online course';

- finding ODL courses on institutional websites can be challenging; and when found, the details provided about individual ODL courses often do not provide the full range of information a potential student, or their employer, looking for a part-time study opportunity needs in order to make a decision regarding whether or not the course meets their requirements.

Terminology and categorisation of ODL courses

To aid in the discovery of ODL offerings, the terminology used by the course provider to describe a course needs to reflect the searching methods of potential students. More research needs to be carried out in this area, but the current widespread use of the term 'distance' may be somewhat outdated as a key descriptor for courses delivered online.

For international students wishing to study online from their home country, and for students seeking to study part-time whilst in full-time work, it is essential that it is immediately clear if a course is 'fully' online or if it involves some face-to-face attendance. Based on our own experience, and feedback from the interviews with other institutions delivering ODL courses, it is also important to be clear about the level of print-based content the course has, and if this is in the form of text books which can be purchased online or if much of the content is mailed out to students by the institution.

Relating to the categorisation of different types of online and distance learning, an interesting observation to emerge during the interviews was that there were significant variations in how institutions interpreted commonly used terms such as 'online course' and 'blended learning'. For some institutions, a course was only considered to be 'fully online' if all the course materials were available electronically, and they would exclude from this category courses delivered largely online but supported by printed resources (such as traditional textbooks and printed resource packs). Similarly, while most institutions considered blended learning to be a course delivered by a combination of online delivery and face-to-face attendance, at least one institution used the term to describe courses delivered by a combination of online delivery accompanied by printed resources.

Sloan-C²² has suggested the following categories for ODL courses:

- **Traditional (0% online)**
Course with no online technology used — content is delivered in writing or orally.
- **Web Facilitated (1 to 29% online)**
Course that uses web-based technology to facilitate what is essentially a face-to-face course. May use a course management system (CMS) or web pages to post the syllabus and assignments.
- **Blended/Hybrid (30 to 79% online)**
Course that blends online and face-to-face delivery. Substantial proportion of the content is delivered online, typically uses online discussions, and typically has a reduced number of face-to-face meetings.
- **Online (80+% online)**
A course where most or all of the content is delivered online. Typically has no face-to-face meetings.

However, these categories are more helpful for differentiating ODL course types within the institution than as marketing terms.

The UCISA 2010 Survey of Technology Enhanced Learning Questionnaire²³ used three simple definitions of ODL which would be of use if employed in a web search filtering system:

²² I.E. Allen & J Seaman, *Learning on Demand: online education in the United States, 2009*, The Sloan Consortium, Jan 2010, p. 4 (<http://www.sloan-c.org/publications/survey/pdf/learningondemand.pdf>)

²³ UCISA 2010 questionnaire, question 3.9 (<http://www.ucisa.ac.uk/groups/ssg/surveys.aspx>)

- **Web supplemented** (online participation optional)
- **Web dependent** (participation required through interaction with content and/or communication tools)
- **Fully online**

Institutions have a sense of what their students are looking for, even if this is not reflected on their websites, and are likely to choose whatever marketing terminology suits them best. It therefore seems unlikely that there would be an adoption of marketing or discoverability categorisations across the sector. Nevertheless, if data were to be collected on ODL course offerings on a nation-wide basis or if a national ODL aggregation service were to be developed, a simple method of categorising different types of ODL courses would be of benefit. However, as mentioned previously, it would be unwise to formally propose what these categories might be without properly researching the searching methods and study requirements of potential ODL students.

Improving websites

Regardless of terminology, much could be done to improve the discoverability of ODL courses on institutional websites. In particular, websites need to have more nuanced course searching systems. The option to search on type of course, course subject and mode of delivery should be standard. It is also fair to expect a keyword search that is restricted to only return course information, not pages from across the whole of the website. Information about ODL courses also needs to be improved to include the details, some of which will be unique to courses delivered in this mode, necessary for students to make a decision as to whether or not the course meets their study requirements.

3.8 Part 3 Desk Research: Investigation of ODL course fees

Part 3 of the desk research used organisational websites to collect fee information on 100 ODL courses provided via commercial partners and 87 ODL courses provided directly by HE/FE institutions. The methodology of the research is described in Annex A.

It proved to be very time consuming to locate this information, and difficult to extract useful trends from the data collected, as the level, award and discipline of the courses have to be taken into account to make fair comparisons of fees charged. It was also a challenge to calculate the total fee for a course as information was often presented by module or per year.

Across the courses we found fee information for, there were a few examples of significant anomalies which asked for double or more in fees compared with apparently similar courses. It would be useful to explore if the reputation of the institution providing or accrediting the course is a significant factor in the pricing of courses (although across our relatively small dataset this factor did not seem to account for the occasional course that appeared to be well outside normal market rates).

Because of the limitations of the data collected, we have not analysed the findings of this part of the desk research, and recommend that further work be undertaken to carry out a more focused study on the cost of ODL courses to students and the financial value of the UK ODL more generally.

3.9 Part 4 Desk Research: Survey of ODL provision

The purpose of Part 4 of the desk research was to design and issue an online survey to capture data on ODL provision that is not available on institutional websites and that was not likely to be immediately available to case study interviewees. The survey was designed to capture the following information:

- The length of time the institution has been offering ODL courses
- The number of courses offered
- Cohort sizes
- Marketing approach
- Institutional infrastructure, including staffing levels
- Training and support for online distance learning
- The financial value of online distance learning to the institution

- Future plans for expansion
- Areas in which the institution would welcome support in order to expand provision

Following consultation with JISC, the survey was circulated to the circa 125 members of the Heads of e-Learning Forum²⁴ (HeLF), as this was felt to be the most suitable target audience. In addition, the institutions interviewed for the case study were asked to complete the survey. Unfortunately, only nine institutions in total responded to the survey. It is unclear why the response rate was so low, but possible reasons are the short timeframe provided for responding to the survey, the difficulty of collecting the information requested across the institution, and a general unwillingness to provide what might be considered strategic or confidential information.

Given the low response rate, the data collected from the survey has not been analysed in this final report. However, the survey and a summary of the responses received are provided in Annex C for information. In order to gain a fuller picture of the financial value of the UK's ODL provision, we recommend that HEFCE/JISC review this survey and consider re-promoting a revised version to appropriate target audiences who have access to the information required to complete it.

²⁴ Heads of e-Learning Forum (<http://w01.helfcms.wf.ulcc.ac.uk>)

4 CASE STUDY PROFILES

4.1 Introduction

To gain an understanding of the motivations for, and barriers to success of, expanding the provision of ODL within the UK, interviews were held with senior staff overseeing e-learning provision within their institution. The interviews were organised to represent a range of ODL activity in the UK across institutions of differing character. Interviews were held with the following institutions:

- De Montfort University
- University of Derby
- Edinburgh Napier University
- University of Essex
- Kaplan Open Learning (a commercial provider)
- University of Leicester
- University of Liverpool
- The Open University
- The Sheffield College

The interviews were undertaken by David White and Sean Faughnan between 13 January and 23 February 2010. Each interview lasted for one hour and was structured around a set of framing questions that were sent to the institutions in advance. The list of the questions used for the interviews is provided in Annex B. The sections that follow provide case study profiles of each of the nine institutions interviewed for the study. These summaries were sent to the institutions to check them for accuracy and to ensure that important details that might have been missed by the interview process were included. The interviews were also used as the basis for section 5 of this report, which explores institutions' experiences of ODL in a more discursive manner.

4.2 De Montfort University

A university that sees ODL as just one of many methods to deliver courses

Institutional website

<http://www.dmu.ac.uk>

Date of interview

14/01/10 (face-to-face)

Interviewees

Nick Allsopp (Quality Improvement Manager)
Dr Richard Hall (E-Learning Co-ordinator)

Description of institution

A lively post-1992 university, De Montfort University (DMU) has a large proportion of CPD courses with more than 170 being accredited by a professional statutory and regulatory body. In their own words: "DMU is a dynamic and lively place to study, combining the latest facilities with leading academics and excellent industry links."

Description of online distance activity

The majority of ODL is focused around blended professional courses such as Youth and Community, Community and Criminal Justice, and Postgraduate Law; some courses require some face-to-face attendance. Their Faculty of Technology and Institute for Energy and Sustainable Development also offer Masters level ODL. Some courses are structured around ODL as part of a contract agreement with a University client, for example a level 7 course for the Home Office teaching probation officers. ODL is seen as an element of what DMU provides where it is appropriate. DMU is not looking to be seen as a distance learning institution in particular, but at the same time ODL is not seen as 'fringe' or novel and is often innovative. The mode of delivery is used wherever it best meets student needs.

Organisational structure

Around a decade ago DMU created a central unit to explore TeL which proved to be too technologically focused (a solution looking for a problem?). DMU's current approach is to encourage 'local ownership' of ODL at the appropriate scale, generally at departmental or programme level. There is a certain amount of central support available but the centre is not prescriptive in terms of approach or technology provision. This means that there are a range of strategies used across the institution tailored to the needs of particular disciplines. The level of ODL support staff in each faculty varies according to student numbers and overall approach. DMU describes its institutional approach to distance learning as 'hub and spoke', which includes facilitating events and discussions between those providing ODL, such as a biennial TeL symposium.

Key issues/approaches

- DMU has a strong focus on maintaining the level of 'contact hours' which can be facilitated using a variety of methods. ODL is seen as one of these methods that can be designed into a course where appropriate.
- There is a desire amongst academic staff involved in delivering ODL to connect with their students in a 'real-time' environment. DMU has been working to provide these types of online platform, e.g. Wimba Classroom²⁵ or advice on using Skype²⁶.
- DMU recognises that each faculty has particular approaches and is not attempting to 'template' ODL provision across the broad range of courses they provide. This flexibility appears to help maintain the quality of the student experience. Two staff within Library Services, at the centre of the institution, work with Information Services, the Academic Professional Development unit, the Quality Improvement Team, and networks of e-learning coordinators/champions within the faculties to share good practice.

Plans

- DMU expands its ODL provision only where there is a clear benefit to students, or where faculty strategies catalyse this approach. It is not planning to increase ODL as a mode of delivery in and of itself.
- DMU is currently undergoing an overall TeL review which is demonstrating the need for a 'mixed economy' in terms of approach and technology, linked to corporate and faculty strategic plans. It recognises that each discipline needs to be supported differently but that, within this, advice on pedagogical design, quality and technology can be provided centrally.

Advice for the Online Learning Task Force

- ODL forms part of an institution's wider approach to TeL. Its key focus is on enhancement of learning across a range of programmes rather than simply providing training for STEM²⁷ subjects. As such it is not a quick fix or necessarily low-cost. Any efficiency gains remain unclear.
- Institutions should be encouraged to find flexible pathways for engaging with ODL, in order to accredit and validate informal learning, and to enable learners to choose a relevant mix of units for them. Is a 360-credit undergraduate degree fit-for-repurposing via ODL, or do institutions need to work smarter? Building resilience amongst learners is vital.
- Institutions need to develop agility in responding quickly to needs and opportunities as they arise. Senior management should consider whether the structures they deploy to manage ODL are fit-for-purpose in terms of decision-making, resource allocation, and both technological and professional development. There is a view that flexibility in the use of technology is stifled by slow institutional decision-making about resources for technologies and appropriate support.
- Staff need support in assessing whether and how to utilise non-institutional tools so that they have considered all relevant issues, including data management, security and protection, copyright, Intellectual Property Rights (IPR), and online safety. This also applies to the implementation of cloud-based²⁸ applications.

²⁵ Wimba Classroom (http://www.wimba.com/products/wimba_classroom)

²⁶ Skype (<http://www.skype.com>)

²⁷ Strategically important subjects: science, technology, engineering and mathematics (STEM) (see: <http://www.hefce.ac.uk/aboutus/sis/stem.htm>)

²⁸ For a description of cloud-based computing see: http://en.wikipedia.org/wiki/Cloud_computing

- Senior managers should consider their approach to open content and the availability of resources on the open web. An approach to open educational resources should form a central element of this approach.
- Work needs to be undertaken with the students and staff on digital values, identities and literacies.
- Curriculum delivery teams should develop their own strategy for TeL, and adhere to a minimum threshold for TeL activity and support.

4.3 University of Derby

A university which has a significant amount of ODL experience and is planning to expand this mode of provision

Institutional website

<http://www.derby.ac.uk>

Date of interview

15/01/10 (via Skype)

Interviewee

Ms Julie Stone (Online Distance Learning Project Lead)

Description of institution from their website

A vibrant post-92 university which emphasises its commitment to the local community. There is a focus on professional courses and the University's high ranking in the National Student Survey.

Description of online distance activity

Currently 28 vocational/professional courses offered from foundation degrees to Masters level. Examples of courses include: FdA Events Management, BSc (Hons) Psychology and MSc Strategic Management (incorporating PG Cert and a PG Dip).

Organisational structure

- A central ODL Unit which provides support and administration.
- The decision to pursue an ODL approach, and in what form, is taken at faculty level.

Key issues/approaches

- Around 2000-2001 Derby was part of an alliance of 10 universities that worked with a company called NextEd to provide ODL courses. The alliance disbanded as the 'shared' approach to ODL provision did not materialise. Derby continued to work directly with NextEd and benefited from the knowledge of its business systems, but the route to market through this partnership was not realised. However, the University learnt from the experience and began to offer ODL directly.
- Derby currently work with Resource Development International Ltd (RDI Ltd.), a commercial partner that provides a route to market for the University's psychology programme.
- Academics are wary of commercial partnerships and need to feel they retain 'ownership' of their ODL offerings.
- Historically, the ODL provision from Faculties has been variable. There have been differences in practice in relation to pedagogical approach and tutor engagement; however, what is emerging is recognition of good and excellent practice which is now being shared across Faculties and embedded within the overall ODL provision.
- The University has a number of communication mechanisms to share innovative/effective practice, for example, the programme leaders' forum which meets four times a year.
- Initial pilots of online activities that support ODL courses, such as virtual open days, have proved successful and have helped students to feel that they are studying with the University of Derby as an entity. A virtual Awards Ceremony is now being planned.

Plans

- Some hints that ODL might become an entity in its own right in terms of strategy and business model.
- There is a desire to expand this centralised provision to include a broader range of services, for example educational developers and sales/marketing staff.
- There is a real enthusiasm for ODL going into the future with a sense that if the business models and route to market are properly designed then there is huge potential for expansion.

Advice for the Online Learning Task Force

- The provision of matched funding from HEFCE to initiate new programmes.

4.4 Edinburgh Napier University

A modern institution with a balanced, well supported, approach to ODL

Institutional website

<http://www.napier.ac.uk>

Date of interview

12/02/10 (via Skype)

Interviewees

Stephen Bruce (Academic Development Adviser, MLE developments)

Fiona Campbell (Head of Professional Development)

Keith Smyth (Academic Practice, Programme Leader MSc Blended and Online Education)

Description of the institution

A post-92 Scottish university with extensive experience in providing flexible, pragmatically delivered courses for students, some of whom are in work. There is a distinct vocational focus: "By offering creatively designed courses, flexible study methods and accessible routes to higher education we equip our graduates for success in a competitive job market."

Description of online distance activity

Edinburgh Napier offers a small number of fully online courses at postgraduate level (including full programmes and CPD units) and a range of 'heavily blended' or fully online modules across the University that are in place to support flexible and work-based learning.

Estimated numbers of students on fully ODL programmes or CPD units is approximately 400 students. Numbers of students on heavily blended or fully online campus-based modules are difficult to estimate, but are in excess of 1,500.

Organisational structure

ODL developments and the promotion of good practice in online learning and teaching is supported by a large Academic Development department that comprises: Academic Practice, Business Engagement, Partnership and Collaboration, Professional Development and Quality Enhancement. Support for TeL is primarily through Professional Development, while Academic Practice offers accredited programmes, one of which is the MSc Blended and Online Education. Quality Enhancement provides guidance on academic regulations, including for blended and online courses.

Key issues/approaches

- Part of Edinburgh Napier's overall strategy is to ensure that programmes and modules are 'enhanced and supported by appropriate learning and teaching'. If there is a clear benefit to the students, ODL is offered as part of this strategy.
- A recent review/restructuring of all the programmes and modules Edinburgh Napier delivers included articulating and justifying all educational uses of technology.
- To meet student expectations, Edinburgh Napier ensures that all programmes are supported by technology to an extent that is appropriate to the nature and level of each programme.

- The Professional Development team provides design advice and guidance for those looking to develop blended learning and ODL, but does not mandate particular models.
- There is a specific section of the institutional Quality Framework which deals with the delivery of blended and online learning.
- Edinburgh Napier runs an externally accredited MSc in Blended and Online Education for internal staff and educators from external institutions across the UK and mainland Europe.
- Fully online courses involve a high level of interaction to ensure students stay engaged with their learning.
- All students, including ODL students, are assigned a 'personal development tutor' to help guide them through their programme from entry to graduation.
- ODL developers/designers are sometimes brought in at departmental level, either through local or external funding, when a new programme is being developed.
- There is an interest in providing technology to enhance pre-enrolment activities, social interaction and student support service provision around ODL courses. Edinburgh Napier feels that the experience of engaging students in ODL should be broader than simply supporting them in completing the academic aspect of the course.
- Many opportunities are provided for staff to discuss practice in online teaching and learning, including through the Professional Development programme, tailored support for faculties, and the two annual staff conferences which often feature TeL as a prominent theme. The conference in January 2010 focused entirely in this area: *Embedded technology: enhanced learning?*

Plans

- Technology is seen as one tool among many that can help to deliver learning. This approach was described as 'Post Digital'. As such, Edinburgh Napier has no plans to expand ODL purely as a mode of delivery in of itself, although ODL would be expected to feature in Faculty plans and in relation to broader initiatives including Work Based Learning and academic transitions.
- Exploring further the opportunities to provide social spaces for the ODL students and also ways of engaging with the range of institutional activities, including social activities.

Advice for the Online Learning Task Force

Edinburgh Napier felt that it was important not to focus on ODL as a mode of delivery but to set it in the larger context of delivering learning. This involves seeing ODL as one of many routes that can be taken to meet students' needs, and ensuring technology is used effectively in wider support provision.

4.5 University of Essex

An agile university working successfully with a commercial online distance learning provider

Institutional website

<http://www.essex.ac.uk>

Date of interview

28/01/10 (face-to-face)

Interviewees

Keith Brooke (Web and Learning Technology Manager)
 Elizabeth Laws (Project Officer, Academic Partnerships)
 Aulay Mackenzie (Dean of Academic Partnerships)
 Claire Nixon (Head of Academic Partnerships)
 Alex O'Neill (Learning Technologist)

Description of institution

Founded in 1964, Essex is a relatively small university with circa 9,000 students plus 8,500 in collaborative arrangements. It has an impressive track record in terms of research and teaching, ranking highly in national assessment exercises.

Description of online distance activity

- The majority of ODL is delivered in partnership with Kaplan Open Learning (KOL).
- KOL offers Essex-validated Foundation degrees in Business, Marketing, Financial Services and Criminal Justice. They also offer a 'top-up' option to an Honours degree to each of these. Currently KOL provides ODL for around 400 full-time equivalent (FTE) Essex students.
- Essex also delivers some ODL from its campus to nurses and related disciplines on work placements and in Human Rights to students internationally.

Organisational structure

- Essex acts as the awarding body for the KOL delivered courses and they also approve the tutors and sit on the exam board. In all other regards KOL creates and delivers the courses adhering to a tightly defined set of service level agreements.
- The Academic Partnerships Department at Essex oversees the relationship with KOL and other partners.
- Essex also has a central e-learning support unit which provides advice and guidance to the institution's departments but is not prescriptive in terms of delivery models.

Key activity/issues

- There was some tension when KOL was first engaged although it appears that the quality of the partnership has allayed initial fears. The fact that no campus-based academics teach on KOL courses and the management of the relationship by a specialist unit could also be factors in the success of the partnership.
- The KOL courses attract significant numbers of students from the South East. It is thought that this is because potential students are keen to engage with an institution that they know of by local reputation.
- KOL has a mature business and course model which it brought over from the US and modified for the UK market. The UK students requested additional feedback from tutors, possibly because of an expectation of a more 'academic' approach than in the US. KOL keeps a close eye on levels of student engagement, and contacts those that appear to be struggling to offer help and guidance. This approach would be difficult to sustain using traditional university infrastructure and roles.
- The University's campus-based ODL is run by departments where they have identified a clear need for an ODL mode of delivery.
- The University has actively learnt from the KOL model and used this knowledge to inform its ODL initiatives that are delivered directly from the institution.
- The University is experienced in providing TeL for its campus based courses. ODL is an extension of this provision but requires culture change in terms of academics seeing the importance of actively engaging students (rather than delivering knowledge). This culture change is considered to be a more important factor for ODL than the provision of appropriate technology.

Plans

- Possible expansion into delivering postgraduate courses in partnership with KOL.
- Essex is currently conducting an e-learning review to map out practices within the University.
- Some discussion about the possible expansion of ODL directly from the University.

Advice for the Online Learning Task Force

- Don't simply offer financial support for the expansion of ODL. This will simply create pockets of activity which may not be sustainable.
- Recognise a key attribute (and HEFCE objective) of ODL is flexibility.
- Create an overall funding model which rewards (rather than actively disincentivises) flexible delivery.
- Consider adjusting the overarching systems (HESA etc) to facilitate a break-away from a term-based model.

4.6 Kaplan Open Learning

A commercial provider working in partnership with the University of Essex

Institutional website

<http://www.kaplanopenlearning.org.uk>

Date of interview

18/01/10 (via Skype)

Interviewee

Mr Alan Jenkins (Managing Director)

Description of institution

KOL is a for-profit organisation which takes its model from its larger operation, Kaplan, Inc., based in the US. In the UK, KOL currently works only with the University of Essex. Following the US model, KOL creates and delivers all aspects of the ODL and looks to the University to provide guidance on quality, sit on their exam board, approve tutors and appoint external examiners.

Description of online distance activity

KOL's online tutor-led degrees closely replicate a traditional campus classroom, but with greater flexibility and a high-level, personalised support from tutors and advisers. Currently KOL provides six foundation degrees and two 'top-up' BAs. The courses are all career-focused and are offered in the following subject areas: financial services, business management, marketing and criminal justice. They are aimed at professionals who may have missed the chance to gain an undergraduate qualification 'the first time around'.

Organisational structure

- KOL is essentially a complete ODL service. It employs learning technologists, technical developers, course authors, tutors etc. One of the key aspects to its approach is the use of 'Student Support Advisers'. These are, on the whole, young graduates who provide non-technical, educational support and advice to students.
- KOL also has a tutor training process which focuses on the skills needed to facilitate online activities.
- The courses do not involve academics based at the University on a day-to-day basis; therefore KOL is not tied into the traditional structure of the institution. It liaises with the Academic Partnerships Department which oversees all the University's relationships with affiliated bodies. A service level agreement is in place between KOL and the University which covers such things as tutor response times, the availability of the online learning platform and student-tutor ratios.

Successes/challenges

- The KOL business model is based on a successful format brought over from the US. Its main focus is to separate student support (both technical and educational) from teaching, thereby freeing the academic tutors to facilitate the learning process.
- Kaplan's approach involves actively supporting students to guard against them becoming disengaged from their courses. If the system flags that a student's level of activity has dropped beyond a certain point, KOL will contact them by email or phone. This is a reflection of the for-profit nature of KOL which clearly considers students to be 'customers'.
- The traditional 'lone' academic role does not work well with ODL as there is a need to work as part of a larger support and administrative team.
- KOL believes that the students value the relationship with the University of Essex and that it is important to them that their qualifications are attached to a traditional body.

Plans

- KOL has publicly stated that it would try to obtain degree awarding powers, but that it does not consider this to be the 'silver bullet' in terms of expanding the business.

- There is an understanding that this form of flexible professional learning is favoured by many over the traditional undergraduate experience. KOL estimates that there are circa 12 million individuals in full-time work in the UK who could benefit from this form of ODL.

Advice for the Online Learning Task Force

- It is challenging for a commercial company, such as KOL, to scale up the business without the advantage of HEFCE funding that the HE sector receives.
- Create an overall funding model which rewards (rather than actively disincentivises) flexible delivery.

4.7 University of Leicester

An institution with a high level strategic focus on online distance learning

Institutional website

<http://www.le.ac.uk>

Date of interview

14/01/10 (face-to-face)

Interviewees

Ms Helen Lentell (Director of Distance Learning Development)
Mr Alex Moseley (Educational Designer)

Description of institution

Leicester is a small red brick university which promotes itself as being high quality but accessible. It won the Times Higher Education University of the Year 2008/09, being described as 'Elite but not Elitist': "Some universities consider their primary purpose to be high quality research, others concentrate on excellent teaching. At Leicester we think that the two are not only complementary, they're inseparable."

Description of online distance activity

Around 50 distance courses with a varying degree of online activity/content. The majority of courses are Masters in professional subjects. Courses in 'Politics and International Relations' are fully online without any print-based support.

Organisational structure

Until recently, Leicester has been a highly devolved university, with departments offering distance learning (DL) having to make up 'the rules' as they go along independently of each other and on-campus systems and processes. The evolution of DL has reflected this, with pockets of activity being championed by enthusiasts at departmental level. This had led to a range of approaches pedagogically and in the delivery and support of DL. Recently faculties have been organised into four larger colleges. As part of this process, and as recognition of the importance of ODL, a Distance Education Centre was formed last year.

Successes/challenges

- Leicester has been successful in providing DL for some time and considers it an important part of its business strategy. For example, distance learning has its own category on the University's website.
- There is a recognition that institutional systems for measuring staff input to DL and the financial value of the courses need refining. The challenge is how to cost DL activity as opposed to counting the income. For example, DL is different from face-to-face provision and more teaching time may be individual and merge with administration. As a result, the effect can be that expensive academic staff find themselves doing very routine clerical tasks.
- There are pockets of excellence in DL such as the PG Dip/MA/MSc Museum Studies which, while in a niche area, can be drawn upon as a model of good practice.

- Historically there have been examples of particular ODL innovations being created and supported by individuals who have subsequently left the institution. There is recognition that innovation of this kind needs to be embedded in a more sustainable manner.
- Leicester uses international 'agents' to promote (and in some cases resource) DL. This has proved successful, and there is a drive to expand the agents' roles wherever possible.

Plans

- The newly formed Distance Education Centre is exploring methods to discover and communicate good practice. It is also considering what level of development resource and educational support could be provided from the centre of the institution.
- The formation of a Distance Education Centre at the heart of the University is part of a push to support and expand ODL across the institution in a strategic manner. It is clear that there are advantages to providing certain ODL related services from the centre of the institution, as part of a move away from a 'cottage industry' approach at departmental level.
- The Distance Education Centre is hoping to generate a small number of ODL models that will 'grow and change' when employed with a particular department/discipline.
- The underlying approach at Leicester is that academics should concentrate on teaching and research. DL expertise will be given in partnership with academic departments and cover: course design, development, maintenance and logistics. For example, building the Blackboard course so the academics can use it for their teaching, manage the creation of physical resources etc.

Advice for the Online Learning Task Force

- ODL needs to be better recognised as part of an academic's role. Currently academics are pulled in too many directions and DL in general is not properly costed within the activities of departments, or captured and valued within official reward structures.
- Student experience must be a key factor in any ODL course design, with academic/pedagogic/teaching and learning design being the driver, not the technologies used to deliver the course, however innovative those technologies may be.

4.8 University of Liverpool

A Russell Group university delivering truly international online distance learning

Institutional website

<http://www.liv.ac.uk>

Date of interview

03/02/10 (via Skype)

Interviewees

Anne Qualter (Head of Education Development Division of the Centre of Lifelong Learning)
Alan Southern (Director of Postgraduate Studies in the Management School)

Description of institution

A Russell Group university which has a particular emphasis on 'education for the professions'. The University of Liverpool (UoL) is experienced in widening participation and welcoming international students.

Description of online distance activity

- The majority (circa 5,000 students) of the UoL's ODL is aimed at professionals.
- There are 17 online programmes delivered in partnership with Laureate Online Education, of which seven are in the Management School. The other programmes are in information technology, health and law.
- UoL has been working in partnership with Laureate for around 10 years.

Organisational structure

- ODL and general TeL activity on campus is guided by the Educational Development Division, which focuses on maintaining quality by providing effective pedagogical design and advice.
- The courses delivered in partnership with Laureate are overseen by staff in relevant faculties.
- UoL invests in the quality control of the programmes and has implemented a number of Quality Assurance (QA) processes, overseen by staff in respective departments and by University-wide committees, to ensure UoL quality principles are maintained.
- All of the online programmes are wholly UoL programmes delivered in partnership with Laureate. The instructors who teach on the programme are appointed by Laureate, but are recognised teachers of the University and engage in a wide range of University activities, for instance discussions on curriculum development.

Key activity/issues

- Laureate, which is a large US-based company, is an organisation with a significant amount of experience in delivering fully online courses internationally. It uses Student Support Managers who act like personal mentors to the students.
- The programmes delivered by Laureate are very actively marketed, including highly visible links on the home page of the UoL's website.
- A typical student on these courses is a mature professional with different expectations from a traditional campus-based undergraduate. This is a key factor in the way in which the courses are designed. In some senses the character of the student body is more significant than the online mode of delivery.
- To ensure a high quality student experience the student to tutor ratio is never more than 20 to 1. Tutors are recruited from across the world, trained and recognised as teachers of the University. Tutors are overseen and supported by faculty members at the UoL.
- Laureate and UoL worked closely together from the early days of the collaboration to develop the model as a high quality 'product'. This involved Laureate developing and adjusting its established systems and UoL reviewing and elaborating its systems to accommodate the developing model.
- ODL is not considered a cheap option, nor is it seen as easily scalable, but UoL and Laureate appear to have found a successful business model. The ODL and TeL activity delivered from campus is evolving and expanding. Networks of staff that are involved with e-learning in the University share examples of good practice and inform policy development through an e-learning steering group.
- The Educational Development Division does not mandate a particular ODL model but does offer support for programmes delivered from the campus. The University is concerned to ensure that all programmes work through its normal QA systems, and to achieve this has made some adjustments to that system so that flexibility is maintained while retaining rigour.
- The University has a PG Cert which includes an optional 15 credit module in TeL. Academic and other staff are also offered the opportunity of taking this module as standalone CPD.

Plans

- The University has a strategic international focus. It expects to continue to expand its offerings with Laureate.
- ODL is central to the University's strategy as a whole.
- There are also plans to increase the amount of ODL delivered directly from the campus.

Advice for the Online Learning Task Force

- Facilitating cross sector sharing of successful pedagogic models.
- UoL is convinced that there is latent demand from professionals working in full time employment for study with UoL; that it needs to be responsive to this and that online learning is part of that response. This latent demand will include business-to-business (B2B) and business-to-government (B2Gov).

4.9 The Open University

Making the transition from traditional distance learning to online distance learning

Institutional website

<http://www.open.ac.uk>

Date of interview

13/01/10 (face-to-face)

Interviewees

Professor Gráinne Conole (Professor of e-Learning)
Niall Sclater (Director of Learning Innovation)

Description of institution

It describes itself as: "The only UK University dedicated to distance learning." With 150,000 undergraduate and more than 30,000 postgraduate students, the Open University (OU) is a provider of distance learning on a massive scale. The student body has a very particular constituency: "Nearly all students are studying part-time. About 70 per cent of undergraduate students are in full-time employment. More than 50,000 students are sponsored by their employers for their studies."

Organisational structure

- A rigorous course production and QA model for distance education has been established over many years.
- Many support and delivery systems are centralised to make working at scale feasible.
- Student experience/satisfaction is a key focus. The OU takes pride in its high position in student satisfaction league tables.
- A significant amount of educational and e-learning research is undertaken by the Institute of Educational Technology unit (IET).

There is an ongoing dialogue between the research activities of the IET unit and the units directly responsible for delivering courses. The IET unit is currently developing a small number of models (circa five) of ODL against the criteria of pedagogy, innovation, cost-effectiveness and performance. These models accept the complexity of teaching and learning at a distance while attempting to be pragmatic in terms of implementation. However, those involved in managing the production and delivery of courses are keen to simplify models wherever possible to ensure that they are feasible to deliver and support.

Key issues/approaches

- All courses are for distance learners and are increasingly supported by online components.
- A small number of fully online courses such as the Masters in Open and Distance Education.
- Many cutting edge research and development projects in ODL such as 'Open Learn' and 'Social Learn'.
- Experienced OU students have an expectation of content delivery in text form as the core of the course. The OU sees text as the heart of its courses, though it is increasingly being supplemented with other media and activities.
- Working at such a large scale (the OU has a network of around 8,000 tutors and approaching 200,000 students), technological/pedagogical innovation can be high risk.
- There is a sense of ownership with paper-based materials for both staff and students. The printed materials often come to symbolise the course itself. If courses become fully online many students may question what they have 'bought'.
- The role of the course team needs to shift towards facilitating activities and communication rather than merely providing content. This is especially important if courses are to increasingly be delivered online.

Plans

There is a general move to increase the level of online provision within the distance learning. The exact methods employed to do this are clarified in its Teaching and Learning Strategy.

Advice for the Online Learning Task Force

Acceptance that this area is still in flux and that while it is possible to develop models they need to account for disciplinary and institutional contexts. Models are most useful as a “tool to help people redesign” rather than as a template to follow.

4.10 The Sheffield College

A further education college delivering ODL at HE level

Institutional website

<http://www.sheffcol.ac.uk>

Date of interview

23/02/10 (via telephone)

Interviewees

Julie Hooper (Online College Manager)

Phil Euesden (Online Programme Manager)

Description of institution

The Sheffield College provides flexible vocational education for the local community. It offers: “...routes to learn new skills and refresh your education throughout your working life, in a sociable and welcoming atmosphere...”.

Description of online distance activity

Two fully online foundation degrees in e-communications with around 85 enrolled students. It makes a clear distinction between distance learning and online learning.

Organisational structure

The online college, which is viewed as a ‘virtual college’ within The Sheffield College, was officially formed very recently when ODL activity reached a critical mass. However, the staff involved in running the online college have been creating and delivering ODL for over a decade. The HE activity of the online college is delivered in partnership with Sheffield Hallam University.

Key issues/approaches

- The College has built up its experience of creating and delivering ODL over the years, starting with a GCSE English course and working its way up through the levels to foundation degrees. There is now an ODL pathway for students from level 2 to level 5.
- The flexibility of ODL attracts a wide range of students. These courses have become a good example of equality and diversity within the overall College.
- It aims to ‘foster parity’ between the students and the tutors to encourage the students to see their contributions as valuable.
- Historically it was difficult to manage the delivery of ODL when it was a small proportion of the teaching staff’s work. Now the proportion is up to around 70-80 per cent of teaching time.
- All teaching staff have to complete the college’s online learning qualification (Learning to Teach Online) which ensures that ODL is taken seriously within the institution.
- The online college has evolved over a long period of time but is small enough to ensure that good practice is shared as a natural part of its day-to-day activities.
- The online college generally uses templates within a content management system provided centrally by the institution, but is gradually moving to use its own platforms as they become more available on the web.
- It feels that ODL students are more likely to become ‘independent’ learners than face-to-face students because the courses offer a high level of active engagement and critical reasoning.
- The online college considers that ODL as a mode of delivery is a very useful method of preparing students for the modern workplace in which they are likely to be working in geographically distributed teams/departments.
- The design of the ODL courses involves many assessment points to ensure that students are engaging in the learning and to provide multiple contact opportunities.

Plans

The College is committed to expanding its ODL at HE level and is planning to put all 15 of its foundation degrees partly online in the long term.

Advice for the Online Learning Task Force

- Learning to teach for ODL can help tutors to reflect on and improve their face-to-face practices. The necessity to engage students helps to develop good quality teaching techniques.
- The provision of seed funding for the up-front costs involved in the development of new ODL courses would be helpful, especially for FE institutions.

5 INSTITUTIONAL EXPERIENCES OF ONLINE DISTANCE LEARNING

5.1 Introduction

This section draws on the findings of the nine interviews undertaken by the study, as well as the experience of the report authors who have been successfully developing and delivering ODL for over a decade. As this study relies on a small dataset, only limited conclusions can be drawn from it. However, a number of themes did emerge indicating that institutions in the UK HE sector often share motivations; face common barriers; and find similar solutions to challenges. What follows is a discussion of the key themes emerging from the interviews, illustrated with anonymised quotes, where appropriate. This section of the report acts as a backdrop to the study's recommendations that can be found in section 1.

5.2 Background

Before exploring ODL in an institutional context, it is worth considering how recent developments have influenced current activity. The largest single UK HE venture into ODL, the UK e-University, was disbanded seven years ago in 2003, which is roughly a third of the total life span of the web to date. While many of the lessons learned through that project still stand, now in 2010, use of the web has changed significantly.

The widespread availability of broadband has encouraged individuals to use the web. And where individuals are engaging online, it has become much more integrated into their day-to-day activities. The success of 'social media' applications, such as Facebook²⁹, has added a new layer to the web, expanding its functionality from simply a repository of information to a participatory space. These factors have helped to make online learning more acceptable to both academics and students.

“10 years ago our academic staff were not interested in this, not up for it – this is now changing – this is an important part of the future. The questions back from the academic community weren't 'why, no, can't do' as in the past - it's now 'yes, how?' so there's now a will.”

5.3 Institutional Attitudes Towards ODL

In looking at attitudes towards ODL, it is useful to begin by distinguishing between those institutions that have made the strategic decision to expand their ODL activities from those who have moved into this area only when it proved to be the most effective method of delivering a specific course. The former group consider themselves to have a reputation as ODL learning providers. They have a clear strategic drive based on the mode of delivery that is often reflected by their websites having specific sections for distance or online distance learning.

“... online and at-a-distance is something that we've been involved with for a period of time, and that's growing and it is part of the strategic plan of the University. And, at the same time, I think growth of online and blended is seen as crucial to the direction that we're going in.”

For the institutions that were not looking to expand ODL provision at the institutional level, growth was usually occurring where there was perceived to be a specific need, rather than as part of an overall business strategy. However, in both scenarios, the underlying driver for the development of ODL was to meet the needs of students who would not otherwise be able to study at the institution, usually because they were in full- or part-time work or located too far away.

²⁹ Facebook (<http://www.facebook.com>)

“There is a strategic balance to it, but it’s not technology driven, except in the case of particular groups of students who can’t access our education except through technology.”

“... we would start with the same principle we start with all the time, which is, having identified a market, what is the best way of approaching the learning for those students within that identified market? And if that approach is a distance learning approach, for whatever reason, then we would go about delivering and designing around that. We wouldn’t start by saying, okay we want to design a new distance learning programme, what shall it be lads?”

It is important to emphasise that while the institutional aspirations of these two groups were very different, the relative success or quality of their ODL programmes was not easy to assess or compare. The main distinction between the two groups being that those pursuing ODL strategically were often looking either to centralise ODL services/management within the institution, or were working in partnership with a commercial partner to manage the delivery of their ODL programmes; while those pursuing the development of ODL programmes on a more ad hoc basis had looser institutional structures, with the majority of ODL activity taking place at departmental level.

“There is very little central dictate; it’s much more about enabling, and it’s much more about dialogue. And it’s much more about having nodes in networks that people can go to for support and advice and guidance. But it’s very much about local ownership and trying to build capability amongst those academic staff because otherwise it falls down.”

More generally, institutions were also keen to explore or expand the benefits that ODL has over face-to-face learning, rather than viewing it as a ‘compromise’ mode of delivery or simply as a technological ‘fix’. The focus was not on the medium itself but what could be achieved from a business and pedagogical perspective.

“...we don’t want it to be seen as a second-rate option and want to promote this centralised model and brand as a very good service and a very good way of getting a degree, and we don’t want it to be seen as second-rate in terms of the student experience.”

“I think an interesting thing about online learning is that it promotes an independent student. Students have to engage with the material, they have to work with it; they have to find material, produce their own content. They are a long way from being spoon fed as often you get with weaker students in a face-to-face class. With online learning, you’re constantly pushing your students into the Internet, getting them to be able to discriminate between good sites, bad sites, good content, bad content, synthesise information, and it does produce an independent learner quite quickly actually.”

All of the institutions pointed out that the type of high quality ODL they offered was not cheap to develop or to deliver. The rigour involved in the initial design and authoring of ODL programmes was seen in many ways to be higher than for face-to-face courses, as it is not easy to adjust ineffective ODL courses ‘on-the-fly’ when delivering them at a distance to large numbers of students.

“...online learning has to make for a better experience for students, hasn't it? We can't just do it because we can cut costs; in fact with online learning you do not cut costs – that's one of the things we learned really early on, online learning is not a cheap option.”

5.4 Student Expectations and Experience

Student expectations are a major driver in the provision of ODL, and have to be closely met in order to maintain retention rates. Most ODL students have very different expectations from a traditional campus-based undergraduate. The interviews highlighted that the majority of ODL students are professionals in full-time work and are therefore often not interested in engaging in an online version of undergraduate culture. Alongside this, they generally expect to be engaged, challenged, consulted and supported in a 'professional' manner. Arguably the difference in character of this student body, as compared to traditional campus-based undergraduates, is as influential on course design decisions as the mode of delivery.

“Now where the question starts coming up, I think about just what our purpose is, when you think about whether you do this with undergraduates, the traditional 18 year old population, and the expectation of a university experience for them is very different from your 35 year old. And so we want it to be more than just pots of knowledge or even training for employment, when you think about that you have to think about the student.”

Two of the institutions interviewed discussed the importance of providing some supporting activities to improve the wider experience for ODL students, such as pre-course online open days and online graduation ceremonies, but felt that it would be unwise to attempt to replicate many of the other aspects of the campus-based student experience online as many of these would be unwanted or seen as extraneous. Nevertheless, a few of the institutions considered that some activities in addition to the direct pursuit of gaining a qualification helped maintain student retention. These activities could also encourage the students to feel that, despite being at a distance, they were legitimate members of the institution. In keeping with the tradition of the physical institution, ODL can be enhanced by providing more than just the 'core' of a course.

“... some of the systems and processes, as I said before, were not differentiated enough to serve the needs of these [online] students, and I think that what we're introducing here: a virtual open day, a virtual awards ceremony online so students can be seen 'face-to-face', [shows] that we now recognise what the needs of these students are.”

“... we will continue to find ways in which to use technology to enhance all aspects of the student experience. And there are examples of things that are happening that are about supporting the overall student experience, not just the teaching and learning support. ... there's a lot of work that's starting to emerge that suggests that online tools can be used really effectively to help with the social integration in the sense of being part of the social fabric of the University for online distance learners.”

5.5 The Role of Technology

One of the notable characteristics of the interviews was the relatively minor reference made to specific technologies or platforms used to deliver ODL. Exploring this further, it became clear that, as one interviewee put it, “technology is vital but not central”, and the substantive challenges to delivering successful ODL were ones of design, management, support (student and tutor) and marketing. If these elements were properly considered, a technology solution could always be found. Many of the institutions interviewed used technology platforms that were part of their existing infrastructure (usually an institutional VLE) to deliver their ODL course, supplementing this core provision with additional technology wherever a specific need arose. In summary, the core message to emerge was that, whilst critical to the successful delivery of ODL, technology should be used as a tool to implement strategies, rather than an end in itself.

“...what’s most appropriate to that context? What’s most appropriate to the students? The level, the subject area? It’s usually the teaching and learning issues that inform decisions about how technology should be used and what technology should be used.”

“In a way the whole ‘online, not-online’ debate is a bit sterile because that’s not what the issue is, it’s about delivering learning and teaching to groups of people who might not be here and how you do that. And so of course appropriate use of technology is right, but students shouldn’t feel the technology, the technology shouldn’t be the main experience.”

As the technology matures, the main issue becomes managing students’ comfort and familiarity with using the tools/platforms. Currently asynchronous environments such as online discussion forums seem relatively unproblematic for the vast majority of users, and, while the more sophisticated functionality available through some synchronous or collaborative environments can still be challenging, the level of trepidation seems to be reducing. An increasing number of students are now familiar with a range of web-based platforms and online communication systems as a reflection of their day-to-day activities in the online environment. While this familiarisation can lag well behind ‘cutting edge’ developments (for example the use of ‘smart’ phones or virtual worlds), there is an increasing set of tools and services (often encapsulated in the VLE) that have become generally accepted and unproblematic for the majority of students and tutors.

5.6 Pedagogical Approach

There was considerable discussion in the interviews around the topic of pedagogical models for ODL. Some of this discussion focused on the feasibility of rolling out models from the centre of the institution that could be adapted at departmental level. There was a general recognition that this tends to go against the culture of most organisations in which academics ‘own’ the design process. For practical reasons, the institutions that were planning to significantly expand their ODL activities were more focused on the notion of replicable models, but often in areas supplementary to teaching and learning, for example in areas such as technical and pastoral support. Overall there was recognition that there was no single model that could be used across all disciplines, and that any attempts to rationalise the design and delivery process had to be handled with great care.

“We don’t view the institution as a factory churning out stuff at job-lot kind of standards using a template for technology. We just don’t see that as valuable. And equally we don’t see it as sustainable in the long run to have stuff controlled or managed through particular groups.”

One approach that appeared to be a good compromise in this regard was not to mandate models but to provide design support. This could be in the form of experts in ODL (usually in a role such as a Learning Technologist) who could support academics in making the right choices in their pedagogical

use of technology to deliver ODL. This approach allows for disciplinary differences and leaves the academic ownership of the courses at departmental level, but also helps to reduce duplication of effort and repetition of mistakes across an institution.

“What you can do is exemplify kinds of norms in models and then put in place mechanisms to help people critically rethink their course design so that they think differently. So it’s more about using models as tools to help people redesign.”

While many conflate online learning with self-paced ‘read and click’ training courses, it was clear from the interviews, and our own experience, that successful ODL in HE rarely operates in this manner. Most ODL at HE level uses the web as much for its ability to connect people and facilitate human interaction as to provide access to content. Arguably this puts this provision more squarely in the mainstream of web culture, where the success of ‘social media’ formats echoes the emphasis on activity and communication rather than simply the consumption of content. Thus contact and discussion between students and tutors and amongst the students themselves is central.

“I think one of the clear things that we see among a lot of students is the desire to connect with other students, and that’s something that technologies can clearly facilitate.”

To meet these expectations some of the institutions interviewed had developed strict student-tutor ratios of around 20/25 to 1. This was felt to be the maximum number of students that could form a cohesive group, and around the maximum number in which a satisfactory online discussion could take place.

“...the model that we’ve got to support the pedagogy that we use with the online programmes means that we never have more than 20 to a class.”

In addition to maintaining low student-tutor ratios, some institutions mentioned a focus on maintaining minimum ‘contact hours’ in their ODL and designed their courses with many more feedback points than a traditional face-to-face course. These were put in place as a precaution against students disengaging from ODL, which was seen as more likely than in face-to-face courses in which interpersonal contact occurs as an inevitable result of being in the same physical space.

“...most of these programmes are based on a module structure with lots of pieces of assessment to encourage rapid responses, with lots of interactive sessions built into them so there’s a dialogue and a sense of ownership and social capital built up amongst the students so that they can feel that in a way which just comes naturally.”

This expectation of contact and activity means that it is not possible to easily scale up academic ODL in an ‘industrial’ manner. If pedagogical design is not properly considered then increasing student numbers quickly becomes problematic, using an impractically large amount of academic time. However, enough institutions appeared to be successfully running a high volume of ODL to suggest that this form of delivery can be scaled successfully if handled carefully.

“... you need to convince people there are faces behind the screen, as it were, and that requires effort and investment... And part of it is perhaps cunning staff deployment of the way in which you schedule classes and make people available to be responsive to the chat or the videoconference or whatever it was that you were going to do.”

“In a sense, a traditional university has a very well established [business] model; it knows what its FTEs are and therefore can plan accordingly. Whereas once you start talking about students at-a-distance or developing a blended programme then it’s slightly more difficult because you’ve also got to think about the up-front development costs. ... these are the sorts of things that I think are barriers to getting things going, it’s really your academic departments understanding how to plan with a business plan and also how it’s all going to fit in with their day-to-day running and up-front costs.”

There is much research in this area, funded by JISC³⁰ and others, and, while many of the parameters are about student requirements and pedagogical approaches, it is equally important to understand and manage practical constraints and opportunities. It is clear that lessons have been learned about optimal levels of contact and support and how to scale them, which could be shared more widely across the sector.

5.7 Reconfiguring Academic Roles

The steady expansion of TeL to support campus-based students means that most academics will be familiar with a certain level of technology being integrated into their courses. At the most basic level this might involve the sharing of lecture notes, PowerPoint presentations and so on via the institutional VLE. There was a general recognition among those interviewed that, given the correct support, it was fair to expect academics to be able to learn how to use a VLE as it is no more complex than much of what is involved in using email, browsing the web or dealing with standard institutional online systems.

The most significant challenge however, in terms of institutional culture change, is not on staff acquiring new technical skills but in the shift in teaching approach ODL requires. With the content transmission elements of teaching increasingly handled by online materials or pod/vodcasts, teaching online often takes a more mentoring or facilitative role. In some institutions (most notably the Open University) the role of course author and tutor are completely separate, reinforcing this change. Arguably this shift in academic teaching is analogous to the difference between a lecture and a seminar or tutorial in a face-to-face teaching context but, in the context of a new mode of delivery, it can be perceived as challenging for many academics.

“...by far the biggest pressure I think is the cultural change in not having academics sitting in their offices doing their lectures waiting for students to come to them, but doing that whole engagement process of going out and chasing and the different way that you have to manage distance students and keep their motivation going. And I think that’s a big cultural shift, and that’s where we’d need to put the investment.”

“.. it’s the issues about individual staff’s cultural perceptions of where they are, it’s their lack of technical skills ... the literacy skills they need to be able to do this and their perceptions about these things... And so we’ve got cultural issues, about shifting away from thinking about a content-based approach to something that’s more activity-based and more varied and more holistic.”

³⁰ JISC e-Learning programme (<http://www.jisc.ac.uk/whatwedo/programmes/elearning.aspx>)

“...we foster parity between tutor and student on the course. I think that one of the differences between face-to-face and online is that we break those barriers down between tutor and student quite considerably.”

This shift in teaching approach is being supported by some institutions in the form of TeL or ODL tutor training courses that explore the role of the academic in supporting and facilitating activity rather than simply conveying content.

A further common concern of academic staff is that online teaching results in unreasonable expectations on the level of tutor support, with students expecting tutors to be available ‘around the clock’. Expectations of both tutors and students in this area can be managed by clear statements on such things as contact hours and response time, considered during the course design process, and clearly set out to students.

Relating to this, the role of student support is becoming increasingly important to meet the expectations of students without over burdening academics. This role, which is currently emerging across the sector, can be undertaken by individuals who have a clear understanding of the educational process and pressures, without necessarily being a subject expert. Student support staff can increase the opportunities for students to engage with someone who understands the ODL process, providing ‘pastoral’ support and advice around traditional student concerns such as: course structure, academic expectations, assignment formats and the use of shared facilities such as the library. This type of role can be effective in allowing students to feel supported, maintaining the quality of the student experience and releasing subject specialists to concentrate on teaching the discipline.

5.8 Institutional Infrastructure

Historically, ODL has grown-up in institutional departments in which keen individuals were prepared to champion a new approach. In many institutions this has led to relatively autonomous pockets of ‘cottage industry’ style ODL activity being resourced using a variety of methods. Often the student experience and the expectations on staff vary significantly across these pockets of ODL activity, so that both a duplication of effort and replication of mistakes are possible across the institution as a whole. As a result of this, many of the institutions interviewed were considering what can or should be centrally supported.

“...what I’m looking to put before the [governing body] at the moment - how we take the business forward using a very centralised model with developers for the business, dedicated sales people and a dedicated support team. We already have the support team but we draw on the rest of the University resources to take the business forward.”

“...the only level we’ve got so far is a kind of instruction or educational design to help design the courses on the pedagogical side but we’re hopefully going to build a learning technology side. And then there’s other areas, managing print processes, delivering materials, keeping track of materials etc. ...again that’s something that’s being done by each individual department with separate contracts with third parties, so that can all be brought in centrally and we can minimise a lot of effort. Exams and assessments; again there are processes in there that aren’t academic and aren’t unique to departments that can be taken out [centralised].”

It is tempting to imagine that a simple review of ‘best practice’ and resourcing would allow any institution to gather much of its ODL provision towards the centre of the organisation. Certainly, in the administrative, technical, marketing and management functions, which are so crucial to success in this area, there is much to suggest that this should be the case. The notion that it ought to be possible

to define a number of templates or models that can be applied to ensure consistency and efficiency is appealing, especially to those responsible for scaling up provision. However, as mentioned previously, the majority of institutions interviewed were quick to point out that many disciplines require an approach to ODL that is specific to their particular needs and context. In addition, it was clear that academic ownership of ODL needed to reside in an appropriate department in order to ensure academic integrity.

“I think the academics feel very precious over their programmes, in how they’re operated. ...they’re passionate about teaching, and what you’re actually doing is stripping them of their teaching and just putting them in quality control roles about how those things are done, and they don’t like that.”

One of the potentially negative aspects of a departmental approach that was highlighted in the interviews is that academics can often become too involved in technical development work.

“... it’s professional work. ...we want to build the car [ODL course] in consultation with academics. But we want the academics to drive the car, and we in our University are struggling with this because there are some people that think that, give the academics these electronic tools and hey presto that’s all they need.”

As mentioned, a central provision of design expertise, working with academics in their own disciplinary contexts, appeared to be the most pragmatic way forward. The role of technical developer to support the creation of online courses has often been handled by learning technologists, but, as the number of ODL courses expands, more explicit separation between supporting roles with a pedagogical and technical focus is increasingly necessary. The recognition that there needs to be the provision of these specialist skills demonstrates the maturing of ODL away from its reputation as a fringe or experimental activity. Having said this, it is important to recognise that ODL is still evolving (technologically, pedagogically and in terms of business models) and that innovation should not be seen as in direct opposition to notions of quality or consistency. One danger of over centralising ODL provision is that innovation will be frozen into models and systems at a particular moment in time, creating the risk of reputational damage as the rest of the market moves on.

“...you’ve got to manage these things at an institutional level, skill and complexity costs so while on the research side and innovation side you’ve got to have complexity and you’ve got to be trying out lots of things; if these things turn out to be effective then you’ve got to find a way of mainstreaming them.”

The important factor here is effective communication to ensure that wherever possible successful innovations are shared and not left solely with their originator. All the institutions interviewed recognised the need for the centre of the organisation to facilitate communication between pockets of ODL activity, and a variety of communication formats were already in place, for example workshops, ‘show and tell’ sessions, and institutional TeL conferences. It was recognised that ODL activity at the department level could become dangerously ‘siloes’ which can lead to the duplication of effort and missed opportunities for embedding successful approaches. Significantly, a lack of communication had, in some cases, led to specific innovations collapsing when an individual left the institution; i.e. keen individuals can ‘prop-up’ activities which come to be expected by the students but which are not practical to deliver on an ongoing basis.

“...if someone develops something and then leaves you can be left in the lurch... if that innovation was brilliant while that member of staff was there, that innovation *is* that member of staff.”

“...we’re also aware that technology is moving incredibly quickly, that there are new products which do things better, and there is a tension between people who will want to be early adopters of that new stuff, and the institution which is trying to safeguard standards and reputation.”

One way to reduce the tension referred to in the quote above is to ensure that staff are trained properly to understand the nuances of ODL as a mode of delivery. Many of the pedagogical and technical skills required to be an effective ODL author or tutor are, in general terms, not tied to a specific disciplinary approach. A number of the institutions interviewed provided online tutor training from an academic development or equivalent unit. In all institutions there are numerous traditional central services which could support ODL more effectively if provision is strategically ‘joined-up’. These include the library, website development, careers advice etc. However, in some cases ODL activity within the institution was not taking advantage of this type of existing service.

“The University is so small that when I started here I couldn’t believe that people didn’t know there were people in the library [who could help]. I felt I was like a marriage broker.”

5.9 Quality Assurance

To maintain quality standards across departments, all of the institutions interviewed subjected ODL to the same centralised QA processes as face-to-face courses. In some cases additional quality standards had been put in place for such things as response times, with the result that ODL may have been scrutinised more closely than traditional courses. Although one institution made the point that while all ODL courses had to sign-up to specific quality standards, there was no policing of the actual delivery of the ODL to those standards.

“What we’re trying to do is develop the policies to support distance learning and develop the models and the student support processes to enable academic departments to do this in the same way as they control their face-to-face [courses]. ...whether it’s in print or electronic you say at the beginning of our QA process what you’re going to do and the University takes it on trust; it doesn’t actually come back and check that you do any of this.”

Quality and consistency could also be improved by centralising the production of supporting materials, to ensure that students and tutors are properly orientated and supported in their ODL activities. For example: inductions, FAQs, technical guides, learning support guides, teaching support guides, online etiquette tips, study skills, research skills; these resources are all time consuming to create from scratch and difficult to make comprehensive without overwhelming students and tutors. They are also the type of materials which require regular and laborious updating.

While some of these supporting materials will be specific to the context of a particular course, much of this type of documentation can be made generic and provided/managed centrally. This is especially important when an institution’s ODL is predominantly delivered via a central VLE, and avoids numerous versions of very similar support guides being authored. The challenge here is in identifying exactly what can be provided generically or in a form that is easy to modify to a given context.

5.10 ODL Provided in Partnership with Commercial Providers

Three of the institutions interviewed worked in partnership with a commercial provider. These providers offer a range of services from marketing right through to the complete design and delivery of ODL courses. The exact business model in these partnerships varied considerably. Two of the

partnerships we explored had a minimal overlap³¹, with the commercial provider looking to the HE institution for accreditation, vetting of tutors, overseeing assessment and quality/service level agreements. All other aspects of the ODL process were handled by the commercial provider including marketing, student and tutor management, technical infrastructure and, in most cases, course authorship and development. The remaining partnership was focused on providing a route to market, leaving the HE institution to create and deliver the ODL programme.

Two of the partnerships explored delivered only postgraduate level courses while the third provided foundation degrees and a couple of undergraduate degrees. All of the courses were aimed at professionals looking to further their careers.

Given the limited scale of this study we cannot claim to have a broad overview of ODL partnerships in the UK, but what follows is a review of the substantive themes that arose from the interviews.

In terms of students' expectations and motivations the fact that courses delivered by a commercial provider were 'rooted' in a UK HE institution appears to be very important.

“...I think when [the commercial partners] are selling the programmes to students they have to strongly say ‘these are [the HE institution] certificates, you will get the same award as [the HE institution] students, and these are [the HE institution’s] approved tutors and the fact that they have to say all that leads me to the position that it’s very important to the student. And students will sometimes ring and check it really is [the HE institution].”

“...I think the degree of attachment that these students have with [the HE institution] or any university is much stronger than we sometimes recognise.”

It would appear that the concept of what it means to be a student ‘with’ or ‘at’ a university and its associated reputation is a critical consideration for ODL students. This was also reflected in the opinion of one of the commercial providers who was open about seeking accreditation powers if they became available but suspected that links with traditional institutions would need to be maintained at some level.

“We have a publicly stated intention that we will go for degree awarding powers at some point in the future but I don’t think it’s a ‘silver bullet’ at all.”

Reactions to these types of partnerships varied within the HE institutions, with some feeling that this approach is beyond what universities should be providing and could be ‘watering down’ what it means to gain a higher education qualification.

“The views vary, and if I was to say to you that, yes everyone’s jumping up and down about them, the answer’s no they’re not. For some people they’re ambivalent, for some people they regard it as a sort of infringement on higher education, but other people they see it as access to widening education, widening participation, real innovation.”

³¹ Although the partnerships had a minimal overlap the institutions were keen to point out that they were genuine partnerships and not franchises.

“...so we’re thinking we’ve got mature, we’ve got part-time, we’ve got employer, we’ve got in employment built into this. So we’re ticking all those boxes but still there was a political tension about why should we be giving money to a private provider. So that has existed and it did go through the [decision making body] and it caused quite a lot of excitement amongst a subset of members of [the decision making body], but it nevertheless went through. So it’s not without those issues.”

In two of the partnerships the minimal organisational overlap between the organisations appeared to reduce the potential for institutional friction. In both cases, staff within the HE institution were assigned to bridge the relationship between the parties, which involved mediating between the differing cultures of for-profit and not-for-profit organisations. In one case it was noted that the institution had to champion the need for quality over and above the business instincts of the commercial provider.

While the ODL delivered in partnership underwent the same quality procedures as the courses delivered directly from campus, there was a sense that it was especially closely monitored in terms of student experience. Given the for-profit nature of the commercial providers their primary focus was student retention. To ensure this they also work with low student-tutor ratios, have multiple feedback points and provide ‘student-advisers’ to give non-technical support.

“We have a bank of student support advisors who, on the whole, are young graduates. ...whether it be by phone, by text, by Skype, by email, they’re in touch with these students all of the time. As soon as their engagement is dipping a little bit they’re in touch with them. It’s like having a mother.”

This active engagement approach is costly and challenging to scale. Clearly the commercial providers are looking to retain as many students as possible, while streamlining their processes, but it would appear that a high level of engagement is required to make this model viable. Both of the partnerships with minimal organisational overlap are working with commercial providers who were building on success in the US. In both cases their course model had to be adjusted to fit with the requirements of UK higher education, especially with regards to specific aspects of QA. In one case this involved increasing the number of feedback points within the pedagogy of the courses.

“What we’ve learned with [the commercial partner] is that they applied a model initially which was basically a straight copy of a model they’d used in the US, they found it didn’t quite work with the courses and with the students I had here and they changed it to optimise that and with more feedback, it was more tying people in and more prompting of phone calls and emails and so on to kind of engage. And that has been pretty successful and the success rates are reasonably high.”

One of the advantages of a partnership of this type is the opportunity to establish pedagogical and business models from the ground up. The commercial providers do not have the challenge of integrating something ‘new’ into an existing culture. It is also possible for the HE institution to define precise service level agreements for delivery and support such as: response times, contact hours, cohort sizes and the availability of the online learning platform. Guideline metrics of this sort do of course exist within the universities themselves but are generally less explicit and certainly not monitored as closely as in the partnerships we discussed. Mandating academic response times to student enquiries does of course challenge the assumed autonomy of that role, a factor which is associated with the integrity and reputation of academic institutions.

Intriguingly, the international reputation of an institution could have a bearing on the reach of this type of ODL. One of the institutions interviewed typically attracted students to its partnership ODL courses from within a 50-mile radius of the campus. The reputation of this institution seemed to be local in

character. In contrast to this was a partnership which attracted students from around the globe. This is with an institution that already has a long standing reputation as a university catering for international students. This apparent phenomenon requires further investigation but could be a significant factor in the expansion of UK ODL in an international context. What is clear however is that the commercial providers are much more adept at the corporate activity of marketing, especially in a global context.

“ ...they did the legwork and set up agent contracts, and set up arrangements with colleges – they were the sales force for that – we’ve learnt a lot through working with them.”

Due to the commercial sensitivity of these partnerships it was not possible to assess exactly how successful they are in financial terms. However, all of the institutions with partnerships did mention that they had learnt valuable information on how to run their ‘in house’ ODL from their commercial partner. Partnerships with a minimal overlap model are clearly not culturally acceptable for some institutions, but many could potentially benefit from working with commercial providers in other modes – what is not apparent is whether this would be attractive to the commercial partners.

5.11 Conclusion

The interviews established that the institutional motivation for undertaking ODL is to attract new audiences who would otherwise be unable to participate in existing face-to-face programmes. For some institutions, their approach to expanding ODL provision is to adopt an institution-wide strategic development policy; while for others, ODL is simply seen as a possible delivery method to be used, where appropriate. Support and advice to help institutions expand their ODL provision will need to differ significantly depending on which of these approaches is being adopted.

While there are many potential barriers to the expansion of ODL, including:

- resistance of academic staff to adopt new approaches;
- lack of agility to adapt institutional infrastructure to support new modes of learning;
- providing the high-levels of student support necessary for effective online learning;
- high start-up costs;
- maintaining and sustaining innovation;
- lack of expertise and experience in developing business strategies;
- uncertainty of the market;

many of these barriers have become much less significant in recent years and in every case there are examples of successful strategies to overcome them.

Given that the study only had time to interview nine organisations, we cannot make rigorous claims that these findings will be replicated across all HE and FE institutions providing HE level ODL courses. Nevertheless, despite the variation in the character of the institutions interviewed, many of the barriers and motivations around adoption of ODL were similar in nature. We take this as an indication that our findings are likely to be widely applicable across the sector.

6 ANNEXES

6.1 Annex A: Desk Research Methodology

PURPOSE OF DESK RESEARCH

The purpose of this desk research is to undertake a baseline quantitative review of the current UK offering of HE online courses. The aims of the desk research are to:

- Provide an overview of the number and types of institutions in the UK currently involved in delivering ODL courses.
- Provide a snapshot of how many online courses are currently being offered, and the nature of the courses (particularly in terms of level of qualifications and attendance requirements).
- Give an indication of the financial value of the current provision of online learning in the UK by exploring some of the current online course offerings in more detail, in particular to investigate course fees being charged.
- Examine ways in which students and employers worldwide can discover details of HE level online course offered by, or on behalf of, UK institutions.

SUMMARY OF APPROACH

The desk research will be approached from the perspective of a student or employer using the internet to search for a higher education level online course offered by, or on behalf of, a UK institution. The research will therefore rely on publicly available information on website aggregations services collecting together details of UK HE courses and individual institutional/commercial websites. From previous market research in this field, aggregation services offer the quickest way of discovering information about learning opportunities of a certain type, for example online courses, across a range of institutions. However, their coverage is often not complete, and experience shows that often further courses are available when detailed searches of individual institutions' websites are carried out.

Given the limited timeframe of the study and the requirements to provide both an overview of the number of institutions offering online courses in the UK and further details of some of the course being offered, the desk research will be approached in four parts:

Part 1:

- A:** A broad review of HE level online and distance learning opportunities in the UK provided directly by HE and FE institutions using an aggregation service as the basis for the search.
- B:** A broad review of HE level online and distance learning opportunities in the UK provided by HE and FE institutions in partnership with commercial providers. This research will use the results of Part 2C desk research and knowledge gathered from the interviews to be undertaken by the study in order to decide which providers to review.

Part 2:

- A:** A review of individual institutional websites to investigate how easy it is to search for online courses using the institutional website as the starting point of the search and to see how the results compare with data found using an aggregation service.
- B:** A review of commercial partner websites to investigate how easy it is to search for online courses using the commercial partner's website as the starting point of the search.
- C:** A review of the overall visibility of UK online distance learning courses in search engines using the popular search engine Google³² as the starting point of the search.

³² Google (<http://www.google.com>)

Part 3:

An investigation of the cost to students of ODL courses by collecting fee information from course providers' websites.

Part 4:

The design and circulation of a survey to capture information on institutions' range of ODL courses, student numbers, the financial value of this mode of delivery and future plans for expansion.

METHODOLOGY

As outlined above, the desk research will be undertaken in four parts. Part 1 is intended to give a broad overview of the number of institutions involved in delivering online and distance learning and the types of online course available. Part 2 is intended to investigate how easy it is to find online courses on providers' websites and to compare the online courses detailed on institutions' websites with those identified using an aggregation service. Part 3 intends to investigate the cost to students of online courses and Part 4 intends to use a survey to capture additional information about online course directly from institutions.

Part 1: Search of Aggregation Services and Commercial Provider Websites

A: Following a review of various course aggregation services, including Unistats³³, UKPASS³⁴, Prospects³⁵, and Hotcourses.com³⁶, the British Council's Education UK portal³⁷ was found to be the most useful as it is easy to use and offers both the option to search for courses on the basis of the 'Type of attendance' being 'Distance and Online' and also offers the options to search for undergraduate and postgraduate level courses offered by both HE and FE institutions. The team therefore propose using this service as the basis of Part 1 of the desk research.

The Education UK portal has its own list of institutions. However, as the survey needs to focus on institutions offering HE courses, the study will use the 'List of universities and colleges' on the UCAS website at: <http://www.ucas.com/students/choosingcourses/choosinguni/instguide/>. This is a list of HE institutions and FE colleges in the UCAS scheme. This list of institutions was chosen as it has mix of both HE and FE institutions, is a comprehensive list and is very easy to use.

The study team felt that as well as knowing the number of institutions delivering online and distance learning courses in the UK and the number of courses available, it would also be useful to differentiate between online courses and those delivered by more traditional forms of distance learning. It was also felt that it would be useful to know the level of the courses available to see if there are any trends. The levels indicated are the FHEQ levels (see Appendix 1 for further details). It was decided to exclude level 8 (doctorate level) from the study. Initial research has indicated that there are a number of short online courses offered that carry credit towards an undergraduate HE qualification. For the purpose of this study, such courses will be categorised as level 4. Any short course carrying credit towards a postgraduate HE qualification will be categorised as level 7.

The tasks outlined below will be carried out for the all institutions detailed on the UCAS list. For many institutions, particularly the FE colleges, the search is expected to return no results. Three days will be allocated to undertaking this research. Progress will be monitored for the first half day of work, and if it looks unlikely the full list of institutions can be searched in the allocated time, a representative sample of institutions will be searched.

³³ <http://www.unistats.com>
³⁴ <http://www.ukpass.ac.uk>
³⁵ <http://www.prospects.ac.uk>
³⁶ <http://www.hotcourses.com>
³⁷ <http://www.educationuk.org>

Search methodology

The Institutional search of the Education UK site at:

http://www.educationuk.org/pls/hot_bc/bc_all_home.page_pls_all_home_col?x=190794873011&y=0&a=0 will be used for this research. The following search will be carried out for each HE and FE institution on the UCAS list:

1. Select institution from the 'Higher Education Institutions' or 'Further Education Institutions' list.
2. Locate institution and click on the 'View all courses' icon (.
3. Click on the link 'Click here' in the 'Too many results?' section (the pink block at the top of the page) to narrow the course search.
4. In the search box provided, in the 'Type of course' field select the option 'Postgraduate' (this will enable as search of all postgraduate level courses). In the 'Type of attendance' field select 'Distance/online'. Leave the other fields with the default settings.
5. This should return a summary of all the postgraduate level distance and online learning course offered by the institution. These will be categorised by level and whether they are online or distance learning by the researcher. Any notes or observations will be recorded in the comments field.
6. Using the 'back' button on the web browser, return to the full list of courses and adjust the settings in the 'Narrow your search' block to change the 'Type of course' field to 'All UG courses'. Check that the 'Type of attendance' field is still set to 'Distance/online' and then click 'Search'.
7. This second search should return a summary of all the undergraduate level distance and online learning course offered by the institution (including foundation degrees etc). These will be categorised by level and whether they are online or distance learning by the researcher. Any notes or observations will be recorded in the comments field.
8. Steps 1-7 will be repeated for as many institutions as possible from the UCAS list.

B: Initial research has indicated that there are at least five commercial learning partners currently working in partnership with UK HE institutions to deliver online courses. A separate web-based search will be carried out to identify these institutions and their course offerings and the results will be recorded in the same spreadsheet used for the search of the Education UK website. Initial research has indicated that these institutions actively promote their online courses via online advertising and details of these courses can easily be found in general searches in search engines such as Google.

The same categories of data as outlined in Part1A will be collected for key commercial providers by visiting their websites directly. Commercial providers to include in the desk research visit will be informed by the results of Part 2C but should include the following companies: Kaplan Open Learning³⁸, Laureate³⁹, Resource Development International (RDI) Ltd⁴⁰, International Correspondence Schools (ICS)⁴¹ and NCC Education⁴². This task should be straight forward as commercial providers websites are primarily designed to promote a relatively small number of courses so the relevant data should be highly visible. One day will be allocated to undertaking this research.

Part 2: Search of Institutional Websites

A: The purpose of this part of the desk research is to build on the findings of Part 1 and explore how easy it is to find online course from institutional website homepages. Three days will be allocated to this research. The study will start by reviewing the institutional websites of any institutions identified in Part 1 as offering five or more online courses. Time permitting, the sites of other institutions will be reviewed. The searches outlined in Appendix 2 will be carried out and the findings recorded in an Excel spreadsheet. This research will concentrate on online (rather than distance learning) courses. A

³⁸ Kaplan Open Learning (<http://www.kaplanopenlearning.org.uk>)

³⁹ Laureate (<http://www.laureate-inc.com>)

⁴⁰ Resource Development International (RDI) Ltd (<http://www.rdi.co.uk>)

⁴¹ International Correspondence Schools (ICS) (<http://www.icslearn.co.uk>)

⁴² NCC Education (<http://www.nccedu.com>)

maximum time limit of five minutes will be set for searching each institutional website. Observations on how easy it was to find details of online courses and general trends in the available provision will be recorded.

B: The same procedure, outlined in Part 2A above, will be carried out for the commercial providers investigated in the Part 1B desk research. One day will be allocated to this research.

C: To give a basic indication of the UK providers who are most visible in an international context a set of simple searches will be undertaken in the '.com' version of Google (<http://www.google.com>). The results of these searches will be categorised into commercial and non-commercial providers based in the UK or abroad. The first ten sponsored links and the first ten 'free' links will be noted for each search undertaken. The following 'strings' will be used as search terms:

1. Online courses
2. UK online courses
3. Distance courses
4. e-learning courses
5. University courses online
6. UK university courses online
7. Professional development courses online
8. UK professional development courses online
9. Degrees online
10. UK degrees online
11. Foundation degrees online
12. UK foundation degrees online

Half a day will be allocated to this research.

Part 3: Review of Online Course Fees

The purpose of Part 3 of the desk research is to explore the cost of ODL to students in terms of course fees charged. To keep Part 3 feasible, fees will be mapped against award type rather than subject (which is too diverse) or level (which is too broad a category).

A: Using the data collected in Part 1A, the institutional websites of 50 HE and FE institutions will be interrogated for fee information. Fee information will be gathered and mapped against award type (BA, MA, MSc, PgDip etc). The number of each award that fee information is available for should be aggregated then the lowest, highest and average fee should be presented. Institutions will be selected from Part 1 A that cover as broad a range of awards as possible. One and a half days will be allocated to this research.

B: Using the list of commercial providers used in Part 1B repeat the process outlined in Part 3A. One day has been allocated to this research.

Part 4: Survey of Online Distance Learning Provision

The purpose of Part 4 of the desk research is to design and issue a survey to capture data on ODL provision that will not be available on institutional websites and that is not likely to be immediately available to case study interviewees. The survey⁴³ was designed to capture the following types of information:

- The length of time the institution has been offering ODL
- The number of courses offered
- Cohort sizes
- Marketing approach
- Institutional infrastructure including staffing levels
- Training and support for ODL
- The financial value of ODL to the institution
- Future plans for expansion

⁴³ See Annex C for the full survey, including a summary of responses.

- Areas in which the institution would welcome support in order to expand provision

The survey will be circulated to all those interviewed for the case study section of the report and to circa 125 members of the Heads of e-Learning Forum⁴⁴ (HeLF). Members of this forum were considered to be best placed to supply the range of data requested.

⁴⁴ Heads of e-Learning Forum (<http://w01.helfcms.wf.ulcc.ac.uk>)

ANNEX A APPENDIX 1: Framework for Higher Education Qualifications (FHEQ) Levels

The table below provides a summary of the FHEQ levels. The table is adapted from “Table 1: Examples of the typical higher education qualifications at each level of the FHEQ and corresponding cycle of the FQ-EHEA” published in *The framework for higher education qualifications in England, Wales and Northern Island*, Quality Assurance Agency, August 2008, p. 10 (<http://www.qaa.ac.uk/academicinfrastructure/FHEQ/EWNI08/FHEQ08.pdf>). These levels will be used in the desk research to categorise online courses identified.

Typical higher education qualification	FHEQ Level (2008)
Master's degrees (e.g., MPhil, MLitt, MRes, MA, MSc)	Level 7
Integrated master's degrees (e.g., MEng, MChem, MPhys, MPharm)	
Postgraduate diplomas	
Postgraduate Certificate in Education (PGCE)*	
Postgraduate certificates	
Bachelor's degrees with honours (e.g., BA/BSc Hons)	Level 6
Bachelor's degrees	
Professional Graduate Certificate in Education (PGCE)*	
Graduate diplomas	
Graduate certificates	
Foundation Degree (e.g., FdA, FdSc)	Level 5
Diplomas of Higher Education (DipHE)	
Higher National Diplomas (HND)	
Higher National Certificates (HNC)	Level 4
Certificates of Higher Education	

* In April 2005, the Universities Council for the Education of Teachers, the Standing Conference of Principals, Universities UK and QAA issued a joint statement on the PGCE qualification title. The full statement may be accessed at:

<http://www.qaa.ac.uk/academicinfrastructure/FHEQ/PGCEstatement.asp>

ANNEX A APPENDIX 2: Collection of Data Directly from Institutional Websites

The websites of individual institutions will be reviewed and the following information recorded:

- Name of Institution
- Does website mention online or distance learning on homepage? [Yes/No]
- Does the website have a search facility for courses on the homepage (or one level down)? [Yes/No]
- Does the course search facility offer an option to search by mode of delivery or attendance? [NA/Yes/No]
- Does the course search facility offer an option to search by mode of delivery without entering a subject? [NA/Yes/No]
- Does a search (in the main website search facility) for 'online learning' return details of online courses? [NA/Yes/No]
- Does a search (in the main website search facility) for 'distance learning' return details of online and or distance learning courses? [NA/Yes/No]
- Does a search (in the main website search facility) for 'elearning' and 'e-learning' return details of online and or distance learning courses? [NA/Yes/No]
- What is the predominant terminology used by the institution to describe online courses? [Select from: distance learning, online learning, e-learning, other (please specify)]
- Can the online courses identified by the aggregation service (in Part 1) be easily found from the institutional website? [Yes/No]
- Were details of any other online courses not identified by the aggregation service (in Part 1) found? [Yes/No] – If Yes, details should be added to the Excel spreadsheet.
- How easy was it to find online courses from the institutional website homepage? [1-5 scale:
 1. Very easy (e.g. directly from a link on the homepage)
 2. Easy (e.g. a search option in the prospectus or a 'find a course' page)
 3. Relatively easy (e.g. from a search for online courses in the main website search)
 4. Quite difficult (e.g. results only found after a number of searches)
 5. Difficult (e.g. courses not found or require specific detailed search criteria in order to find)]
- How comprehensive was the information provided about online courses on the website? [1-5 scale:
 1. Very comprehensive (e.g. full details provided and you would have all the details you need to enrol)
 2. Comprehensive (e.g. most details provided, but one or two minor details not provided)
 3. Fairly complete (e.g. most details provided, but one key details missing that would need clarification)
 4. Limited (e.g. limited details supplied, potential applicants would need to contact the institution)
 5. Very limited (e.g. almost no details supplied and limited contact details)]

Any comments/observations on how easy it was to find details of online courses should be recorded. When we present the findings of the report we will be looking to demo the best and worst institutional websites found during the study, so details of any particularly good or bad examples should be noted whilst reviewing sites.

6.2 Annex B: Framing Questions for the Interviews

The following questions were circulated to the interviewees ahead of the interviews to assist them to prepare, to guide the structure of the interviews and to ensure that the data collected was as comparable as possible. The questions were modified slightly for KOL and institutions that were working in partnerships with commercial partners.

1. How does online provision align with your institution's business models and strategies?
2. What is your institution's approach to moving your 'brand' online while maintaining perceived quality and reputation?
3. How do you feel online courses are perceived relative to face-to-face equivalents?
4. Is there evidence of online learning widening participation?
5. Do you have any particularly successful course models?
6. What provision does your institution make in terms of staff development, training and support to assist your staff to create and deliver online courses?
7. Are current online programmes central or departmental-level initiatives?
8. How do you manage assessment in your online programmes?
9. How are your online programmes developed and delivered?
10. How are your online learning courses promoted/marketed?
11. Have there been any particular barriers to creating and delivering online courses?
12. What are the key areas that you feel require further investigation or understanding in order to enable the UK to maintain quality and expand its provision of online courses?

6.3 Annex C: Survey on ODL Provision

The survey is included to demonstrate the type of information we attempted to gather. The results of the nine responses received are included as example data but are in no way considered to be representative of the sector as a whole.

1. Name (details removed to ensure responses are anonymous)
2. Email address (details removed to ensure responses are anonymous)
3. Institution (details removed to ensure responses are anonymous)

4. How long has your institution been offering online distance learning?

Answer Options	Response Per cent	Response Count
Don't offer	0.0%	0
Less than 2 years	0.0%	0
2-5 years	22.2%	2
6-9 years	44.4%	4
More than 9 years	33.3%	3
	<i>answered question</i>	9
	<i>skipped question</i>	0

5. In total, how many online distance learning courses does your institution currently offer?

Answer Options	Response Per cent	Response Count
None	0.0%	0
1-10	44.4%	4
11-50	44.4%	4
51-100	11.1%	1
101-300	0.0%	0
More than 300	0.0%	0
	<i>answered question</i>	9
	<i>skipped question</i>	0

6. What types of online distance learning courses does your institution currently offer and approximately how many of each type?

Answer Options	None	1-10	11-20	21-50	51-100	More than 100	Response Count	
Non-accredited (CPD)	2	2	0	0	0	0	4	
Non-accredited (other)	3	2	0	0	0	0	5	
UG level accredited	2	5	0	1	0	0	8	
PG level accredited (CPD)	1	5	1	0	0	0	7	
PG level accredited (other)	1	3	2	0	0	0	6	
							answered question	9
							skipped question	0

7. What is the approximate breakdown of annual student registrations across the following types of online distance learning courses?

Answer Options	None	Less than 100	101 - 200	201 - 500	501 - 1000	More than 1000	Response Count	
Non-accredited (CPD)	1	2	0	0	0	0	3	
Non-accredited (other)	2	2	0	0	0	0	4	
UG level accredited	2	3	1	0	1	0	7	
PG level accredited (CPD)	1	4	0	1	0	0	6	
PG level accredited (other)	1	3	0	1	0	0	5	
							answered question	8
							skipped question	1

8. What is the maximum cohort size of your institution's online distance learning courses? (Tick all that apply)

Answer Options	Less than 10	10 - 20	21 - 30	31 - 50	51 - 100	101 - 200	More than 200	Response Count
Non-accredited (CPD)	0	1	1	0	0	0	1	2
Non-accredited (other)	0	1	1	0	0	0	1	2
UG level accredited	1	2	2	1	0	0	1	7
PG level accredited (CPD)	0	1	1	2	1	0	1	5
PG level accredited (other)	0	0	2	3	0	0	1	5
							<i>answered question</i>	8
							<i>skipped question</i>	1

9. What modes of delivery does your institution offer for online distance learning courses? (Tick all that apply)

Answer Options	Fully online (untutored)	Fully online (tutored)	Blended (both online and f2f study)	Response Count
Non-accredited (CPD)	1	1	2	3
Non-accredited (other)	1	2	1	3
UG level accredited	0	4	4	5
PG level accredited (CPD)	1	4	5	5
PG level accredited (other)	1	4	3	4
			<i>answered question</i>	8
			<i>skipped question</i>	1

10. How does your institution schedule the delivery of its online distance learning courses? (Tick all that apply)

Answer Options	Response Per cent	Response Count
Linked to academic terms	66.7%	6
Regular start dates not linked to terms	88.9%	8
On demand	0.0%	0
When enough students have enrolled	0.0%	0
Other (please specify):		0
	<i>answered question</i>	9
	<i>skipped question</i>	0

11. Approximately what percentage of the students of your online distance learning courses are geographically located outside of the British Isles? (Tick all that apply)

Answer Options	None	1-10%	11-20%	21-50%	More than 50%	Response Count
Non-accredited (CPD)	0	0	1	0	0	1
Non-accredited (other)	0	0	1	0	1	2
UG level accredited	2	2	0	2	0	6
PG level accredited (CPD)	1	0	1	3	0	5
PG level accredited (other)	0	0	1	2	2	4
					<i>answered question</i>	8
					<i>skipped question</i>	1

12. Which VLE(s) does your institution use? (Tick all that apply)

Answer Options	Response Per cent	Response Count
Blackboard	100.0%	9
Desire2Learn	0.0%	0
Fronter	0.0%	0
Moodle	11.1%	1
Sakai	0.0%	0
SERCO	0.0%	0
Other (please specify):		0
	<i>answered question</i>	9
	<i>skipped question</i>	0

13. Does your institution use any other technologies/platforms to deliver its online distance learning courses?

Answer Options	Response Per cent	Response Count
No	55.6%	5
Yes	44.4%	4
If yes, please specify:		4
	<i>answered question</i>	9
	<i>skipped question</i>	0

14. How does your institution promote/publicise its online distance learning courses? (Tick all that apply)

Answer Options	Response Per cent	Response Count
Institutional website	100.0%	9
Online prospectus	88.9%	8
Podcasts	11.1%	1
Web-based course aggregation services	22.2%	2
Advertisements on external websites	33.3%	3
Google AdWords (or similar)	44.4%	4
Social media (such as blogs, Twitter etc)	33.3%	3
Email lists (only current and past students)	22.2%	2
Email lists (compiled by the institution)	33.3%	3
Email lists (purchased from external suppliers)	11.1%	1
Sponsored email adverts	0.0%	0
Printed prospectus	77.8%	7
Other printed media (such as brochures/leaflets)	66.7%	6
Advertisements in printed media	55.6%	5
Through agents or other professional bodies	55.6%	5
Television	0.0%	0
Other (please specify):		1
	<i>answered question</i>	9
	<i>skipped question</i>	0

15. Does your institution promote/publicise its online distance learning courses differently to equivalent courses delivered face to face?

Answer Options	Response Per cent	Response Count
No	33.3%	3
Yes (sometimes)	55.6%	5
Yes (always)	11.1%	1
If yes, please provide details:		1
	<i>answered question</i>	9
	<i>skipped question</i>	0

16. Does your institution deliver its online distance learning courses centrally or via individual departments?

Answer Options	Response Per cent	Response Count
Centrally	0.0%	0
Via departments	88.9%	8
Both	11.1%	1
	<i>answered question</i>	9
	<i>skipped question</i>	0

17. Does your institution work in partnership with a commercial provider to deliver its online distance learning courses?

Answer Options	Response Per cent	Response Count
No	88.9%	8
Yes (for some online courses)	11.1%	1
Yes (for all online courses)	0.0%	0
If yes, please provide details:		1
	<i>answered question</i>	9
	<i>skipped question</i>	0

18. Are existing members of your institution's staff expected to create and deliver online distance learning courses or are specialist members of staff employed? (Please indicate for each staff group.)

Answer Options	Only existing staff	Only specialist staff	A combination of both	Response Count
Academic staff	4	0	4	8
Academic-related staff	3	2	4	9
Clerical/Admin staff	3	1	3	7
Other (please specify):				1
			<i>answered question</i>	9
			<i>skipped question</i>	0

19. What sort of training and support is provided to academic staff to help them to create and deliver online distance learning courses? (Tick all that apply)

Answer Options	Response Per cent	Response Count
None	0.0%	0
Technical training (provided by the institution)	100.0%	9
Pedagogical training (provided by the institution)	88.9%	8
Training provided by an external provider	0.0%	0
Good practice documentation and resources	88.9%	8
Institutional seminars/meetings to share best practice	77.8%	7
Course-level support from a learning technologist (or equivalent)	77.8%	7
Course-level support from a web developer (or equivalent)	33.3%	3
Other (please specify):		2
	<i>answered question</i>	9
	<i>skipped question</i>	0

20. Does your institution have a unit dedicated to developing and delivering online distance learning courses?

Answer Options	Response Per cent	Response Count
No	55.6%	5
Yes (centrally)	33.3%	3
Yes (based in one or more department)	11.1%	1
	<i>answered question</i>	9
	<i>skipped question</i>	0

21. If your institution has a unit dedicated to developing and delivering online distance learning courses, how many members of staff does it employ? (If your institution has more than one dedicated unit, please provide the total number of staff working in all dedicated units.)

Answer Options	Response Per cent	Response Count
Not applicable	55.6%	5
1-5	22.2%	2
6-10	11.1%	1
11-20	11.1%	1
More than 20	0.0%	0
	<i>answered question</i>	9
	<i>skipped question</i>	0

22. Excluding staff working in dedicated online learning units (as identified in questions 21 above), does your institution have staff employed at the department level to specifically develop or deliver online and distance learning courses?

Answer Options	Response Per cent	Response Count
No	66.7%	6
Yes	33.3%	3
	<i>answered question</i>	9
	<i>skipped question</i>	0

23. Across your institution, approximately how many specialist staff are employed to create and deliver online distance learning courses?

Answer Options	None	1	2-5	6-10	11-20	More than 20	Response Count	
Learning technologists	2	0	6	1	0	0	9	
Web developers	4	0	3	0	0	0	7	
Project managers	2	4	2	0	0	0	8	
Online content authors	2	1	0	1	3	0	7	
Online tutors (academic)	2	0	1	0	2	3	8	
Online support advisors (non-academic)	4	0	1	2	0	0	7	
Other (please specify):							1	
							<i>answered question</i>	9
							<i>skipped question</i>	0

24. Approximately how much is your institution's total annual fee income from online distance learning courses? (If you do not have the information available to answer this question, please state this in the comments box below.)

Answer Options	Response Count
	7
<i>answered question</i>	7
<i>skipped question</i>	2

25. How significant is revenue generated from online distance learning courses in terms of your institution's overall annual course fee income?

Answer Options	Response Per cent	Response Count	
Not significant at all	22.2%	2	
Not very significant	44.4%	4	
Of some significance	33.3%	3	
Significant	0.0%	0	
Very significant	0.0%	0	
	<i>answered question</i>		9
	<i>skipped question</i>		0

26. Is your institution's approval and accreditation system for online distance learning courses the same as for equivalent courses delivered face to face?

Answer Options	Response Per cent	Response Count	
Yes	77.8%	7	
No	22.2%	2	
If no, please provide details:		1	
	<i>answered question</i>		9
	<i>skipped question</i>		0

27. Does your institution have a flexible/online distance learning code of practice or strategy?

Answer Options	Response Per cent	Response Count	
No	66.7%	6	
Yes	33.3%	3	
If yes, is it available online? (Please provide a URL):		2	
	<i>answered question</i>		9
	<i>skipped question</i>		0

28. Does your institution have a director of online learning or similar role?

Answer Options	Response Per cent	Response Count	
No	44.4%	4	
Yes (full-time role)	33.3%	3	
Yes (part-time role)	22.2%	2	
If yes, please provide the title of their role. If the role is part-time, please indicate the FTE amount:		2	
	<i>answered question</i>		9
	<i>skipped question</i>		0

29. Is online distance learning part of your institution's Strategic Plan?

Answer Options	Response Per cent	Response Count	
No	22.2%	2	
Yes	77.8%	7	
If yes, please provide further details:		5	
	<i>answered question</i>		9
	<i>skipped question</i>		0

30. Does your institution plan to expand its provision of online distance learning courses in the next five years? (Select the response that best fits your institution's current plans.)

Answer Options	Response Per cent	Response Count	
No current plans to expand	12.5%	1	
Yes - to increase student numbers	87.5%	7	
Yes - by changing the delivery mode of courses offered but within overall student numbers	0.0%	0	
Other (please specify):		2	
	<i>answered question</i>		8
	<i>skipped question</i>		1

31. By how much does your institution expect to expand its provision of online distance learning courses in the next five years?

Answer Options	Response Per cent	Response Count	
Not at all	0.0%	0	
Less than 1%	0.0%	0	
1-10%	55.6%	5	
11-20%	22.2%	2	
21-50%	11.1%	1	
More than 50%	11.1%	1	
	<i>answered question</i>		9
	<i>skipped question</i>		0

32. By 2015 what percentage of your institution's total course provision do you expect to deliver by online distance learning?

Answer Options	Response Per cent	Response Count
None	0.0%	0
Less than 1%	0.0%	0
1-5%	44.4%	4
6-10%	11.1%	1
11-20%	33.3%	3
More than 20%	11.1%	1
	<i>answered question</i>	9
	<i>skipped question</i>	0

33. What do you see as the main barriers to creating and delivering successful online distance learning programmes?

1. Undertaken by staff with full time F2F teaching load. Online learning is not allocated the same 'time in the day' to interact with students.
2. Identifying niche areas to develop
 - Engaging Academic staff in designing distance learning
3. Time and resources at local level. Lack of strategic lead. Focus on preserving face to face.
4. Time and front-end costs to invest in development
 - Marketing costs
 - Organisational culture - not necessarily directed to supporting part time students
 - Publishing and copyright issues
 - Improved university infrastructure for DL delivery
5. Staff time and resources.
 - Investment.

6. Generally, online distance learning courses require more effort on the part of students and the people involved in delivering the course. The effort required for the first iteration of a large course is substantial, especially if the teaching staff are inexperienced in this area. Online courses are very dependant on the teaching staff, so when they move on from the institution, the course leaves too.
7. Lack of sufficient vision and strategy in this regard.
8. Institutional processes not DL based e.g. lack of DL policies so DL squeezed into inappropriate systems, regulations and policies. No appropriate infra structure. Inability to think at an institutional level in production and service terms - counter cultural - but these are core for successful DL.
9. Academic staff skills.

University systems approach wedded to on-campus students.

34. In which areas would your institution welcome further research or support in order to enhance the quality and expand your provision of online distance learning over the next five years?

1. Evaluation of distance learning projects

Better understanding of what students / employers want

Research on effective design and teaching practice for DL - specifically on pedagogies that claim to promote 'higher learning' and 'collaborative learning'

Better understanding of software and supporting technologies that are available to course leaders and tutors.

2. Course design

Marketing

Evaluation

Technical innovation

3. I cannot speak for the institution, but I would like to see the focus on straightforward, clear and concise advice on existing best practice.
4. Role of traditional universities in the provision of online distance learning.
5. Costing, policy, organisational structure, integration of all services, management

6. Investment in content design.

Shared market research

Investment in infrastructure/ system design

35. Would you be happy for us to contact you to discuss your responses to this survey?

Answer Options	Response Per cent	Response Count	
Yes	88.9%	8	
No	11.1%	1	
	<i>answered question</i>		9
	<i>skipped question</i>		0

6.4 Annex D: List of Acronyms and Abbreviations

Acronym or Abbreviation	
B2B	Business-to-Business
B2Gov	Business-to-Government
BA	Bachelor of Arts
BSc	Bachelor of Science
CIE	University of Cambridge International Examinations (http://www.cie.org.uk/)
CPD	Continuing Professional Development
DipHE	Diploma of Higher Education
DL	Distance Learning
DMU	De Montfort University (http://www.dmu.ac.uk)
FAQ	Frequently Asked Questions
FdA	Foundation degree in the discipline Arts
FdS	Foundation degree in the discipline Science
FE	Further Education
FHEQ	Framework for Higher Education Qualifications
FTE	Full-Time Equivalent
GCSE	General Certificate of Secondary Education
HE	Higher Education
HEFCE	Higher Education Funding Council for England (http://www.hefce.ac.uk)
HeLF	Heads of e-Learning Forum (http://w01.helfcms.wf.ulcc.ac.uk)
HESA	Higher Education Statistics Agency (http://www.hesa.ac.uk/)
HNC	Higher National Certificate
HND	Higher National Diploma
ICS	International Correspondence Schools Ltd. (http://www.icslearn.co.uk/)
IET	Institute of Educational Technology (a unit based at the OU)
IP	Internet Protocol
IPR	Intellectual Property Rights
JACS	Joint Academic Coding System
JISC	Joint Information Systems Committee (http://www.jisc.ac.uk/)
KOL	Kaplan Open Learning (http://www.kaplanopenlearning.org.uk)
LLM	Master of Laws
MA	Master of Arts
MChem	Master of Chemistry
MEng	Master of Engineering

MLitt	Master of Literature
MPharm	Master of Pharmacy
MPhil	Master of Philosophy
MPhys	Master of Physics
MRes	Master of Research
MSc	Master of Science
NCC	National Computer Centre
ODL	Online Distance Learning – for the purpose of this report ODL is used as a specific term to describe any course, at any HE academic level, delivered to students at a distance from the host institution, which has a significant component delivered to students online
OU	Open University (http://www.open.ac.uk)
PC	Personal Computer
PG	Postgraduate
PGCE	Postgraduate/Professional Certificate of Education
PG Dip	Postgraduate Diploma
QA	Quality Assurance
QAA	The Quality Assurance Agency for Higher Education (http://www.qaa.ac.uk)
RDI	Resource Development International Ltd (http://www.rdi.co.uk/)
Sloan-C	The Sloan Consortium (http://www.sloan-c.org/)
STEM	Science, Technology, Engineering and Mathematics
TALL	Technology-Assisted Lifelong Learning (http://www.tall.ox.ac.uk/)
Tel	Technology-enhanced Learning
UCISA	Universities and Colleges Information Systems Association (http://www.ucisa.ac.uk/)
UG	Undergraduate
UK	United Kingdom
UoL	University of Liverpool (http://www.liv.ac.uk)
URL	Uniform Resource Locator
US	United States (of America)
VLE	Virtual Learning Environment
XCRI	eXchanging Course-Related Information (http://www.xcri.org/)