

The UK approaches to quality in e-learning

- as seen from the HE Academy/JISC benchmarking programmes
- and more recent developments including Re.ViCa and the DL benchmarking club

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Topics

1. Introduction, disclaimers and acknowledgements
2. The four phases of the UK HE Benchmarking Programme
3. More recent developments in UK HE benchmarking e-learning
4. Implications for schemes on Quality of e-Learning

1. Introduction, disclaimers and acknowledgements

Disclaimer: This talk is *not* on behalf of
any institution, agency or ministry
– it is a personal expert view

Thanks to HE Academy, JISC,
EU Lifelong Learning Programme,
Manchester Business School
and University of Leicester for support
- apologies to others omitted

Re.ViCa

(Review of Virtual Campuses)

- Project supported by the European Union under the Lifelong Learning Programme - Erasmus/Virtual Campus
 - With International Advisory Committee
- Database of countries, agencies and Programmes (500)
- Nine case studies
- Set of 17 **Critical Success Factors** developed after wide international consultation – embedded in Pick&Mix scheme
- Organised post-secondary e-learning initiatives are found across the “G-100” (all except the Least Developed Countries)



2. The four phases of the UK HE Benchmarking Programme

an overview

Benchmarking e-learning

- At national level, started in **UK** and **New Zealand**
 - Soon spread to **Australia**
 - Not closely linked initially to quality agenda
- At **European** level, developments include **E-xcellence** and **UNIQUe**
 - Some earlier work from OBHE, ESMU etc – but not in “public criterion” mode
 - Later, developments in other projects
 - Increasingly, links made to quality agenda

Benchmarking e-learning (UK)

- Foreseen in HEFCE e-learning strategy 2005
- Higher Education Academy (HEA) oversaw it
- Four phases – 82 institutions – 5 methodologies
- Two consultant teams – BELA and OBHE
- Justified entry to HEA Pathfinder and Enhancement *National initiatives* - and useful for JISC initiatives also (Curriculum Design etc)
- Can be leveraged into update of learning and teaching strategy (e.g. Leicester U)

Documentation – very good

- HE Academy reports on benchmarking
- Evaluator reports on each phase
- Consultant team reports on each phase
- Conference papers (EADTU/ICDE each year – and ALT-C etc)
- Definitive book chapter (to appear)
- HE Academy blog and wiki (web 2.0)
- Specific HEI blogs and some public reports
- http://elearning.heacademy.ac.uk/wiki/index.php/Bibliography_of_benchmarking

UK: benchmarking e-learning

“Possibly more important is for us [HEFCE] to help individual institutions understand their own positions on e-learning, to set their aspirations and goals for embedding e-learning – and then to benchmark themselves and their progress against institutions with similar goals, and across the sector”

Methodologies in UK HE

- There were **five** methodologies used in UK but only two now have **public criteria**, are **routinely updated** and are **available for single institutions** (to use outside consortia):
 - **Pick&Mix**
 - Used under HEA auspices in 24 UK institutions
 - Including 4 diverse institutions in Wales
 - Now being used in a further UK HEI and one in Australia
 - About to be used by the 7-institution **Distance Learning Benchmarking Club** (UK, Sweden, Australia, Canada, New Zealand)
 - eMM – as used in New Zealand and Australia

Pick&Mix overview

- Focussed on e-learning, not general pedagogy
- Draws on several sources and methodologies – UK and internationally (including US) and from college sector
- Not linked to any particular style of e-learning (e.g. distance or on-campus or blended)
- Oriented to institutions with notable activity in e-learning
- Suitable for desk research as well as “in-depth” studies
- Suitable for single- and multi-institution studies

Pick&Mix history

- Initial version developed in early 2005 in response to a request from Manchester Business School for an international competitor study
- Since then, refined by literature search, discussion, feedback, presentations, workshops, concordance studies and four phases of use – fifth and sixth phases now
- Forms the basis of the current wording of the *Critical Success Factors* scheme for the EU Re.ViCa project

Pick&Mix

Criteria and metrics

Criteria

- Criteria are “statements of practice” which are scored into a number of performance levels from bad/nil to excellent
- It is wisest if these statements are in the public domain – to allow analysis & refinement
- *The number of criteria is crucial*
- Pick&Mix currently has a core of 20 – based on analysis from the literature (ABC, BS etc) and experience in many senior mgt scoring meetings

Pick&Mix: 20 core criteria

- Removed any not specific to e-learning
 - Including those in general quality schemes (QAA in UK)
- Careful about any which are not provably success factors
- Left out *of the core* were some criteria where there was not yet UK consensus
- Institutions will wish to add some to monitor their KPIs and objectives. Recommended no more than 6.
 - Pick&Mix now has over 70 supplementary criteria to choose from
 - more can be constructed or taken from other schemes
- **These 20 have stood the test of four phases of benchmarking with only minor changes of wording**
 - originally 18 - two were split to make 20

Pick&Mix Scoring

- Use a 6-point scale (1-6)
 - 5 (cf Likert, MIT90s levels) plus 1 more for “excellence”
- Contextualised by “scoring commentary”
- There are always issues of judging progress especially “best practice”
- The 6 levels are mapped to 4 colours in a “traffic lights” system
 - red amber olive green

Pick&Mix System: summary

- Has taken account of “best of breed” schemes
- Output and **student-oriented** aspects
- Methodology-agnostic but uses underlying approaches where useful (e.g. Chickering & Gamson, Quality on the Line, MIT90s)
- **Requires no long training course to understand**

Institutional competences

- University of Leicester used Pick&Mix in the very first phase of the HEA programme
 - And two phases of re-benchmarking
- Other universities with strong competence (with approved HEA Consultants) are University of Derby and University of Chester
- Several other universities have done excellent work and produced public papers and reports (e.g. Northumbria, Worcester)

Pick&Mix

Three sample criteria

P01 “Adoption” (Rogers)

1. Innovators only
2. Early adopters taking it up
3. Early adopters adopted; early majority taking it up
4. Early majority adopted; late majority taking it up
5. All taken up except laggards, who are now taking it up (or retiring or leaving)
6. First wave embedded, second wave under way (e.g. m-learning after e-learning)

P10 “Training”

1. No systematic training for e-learning
2. Some systematic training, e.g. in some projects and departments
3. Uni-wide training programme but little monitoring of attendance or encouragement to go
4. Uni-wide training programme, monitored and incentivised
5. All staff trained in **VLE** use, training appropriate to job type – and retrained when needed
6. Staff increasingly keep themselves up to date in a “just in time, just for me” fashion except in situations of discontinuous change

P05 “Accessibility”

1. VLE and e-learning material are not accessible
2. VLE and much e-learning material conform to minimum standards of accessibility
3. VLE and almost all e-learning material conform to minimum standards of accessibility
4. VLE and all e-learning material conform to at least minimum standards of accessibility, much to higher standards
5. VLE and e-learning material are accessible, and key components validated by external agencies
6. Strong evidence of conformance with letter & spirit of accessibility in all countries where students study

Other methodologies

- Members of the BELA team have run three other methodologies:
 - MIT90s, eMM and ELTI for HE Academy
- And analysed most others:
 - Most US and European methodologies were analysed
 - QoL, E-xcellence, BENVIC, OBHE
- Insights from other methodologies are fed into Pick&Mix to improve it

National indicators

- Pick&Mix is mapped to the HEFCE Measures of Success (England)
- Similar mappings were done for the Welsh Indicators of Success – draft and final
- and for the Becta Balanced Scorecard (for colleges)

Comparative work

- A databank of scores from 10 HEIs is public in anonymous form
- Because each criterion is stable in concept, longitudinal comparisons (across time) are also possible
 - Old criteria are withdrawn if no longer relevant and new criteria introduced (e.g for Web 2.0 and work-based learning)
 - Several HEIs have done re-benchmarking

Carpets

Criterion name	A	B	C	D	E	F	G	H	I	Av
Adoption										3.6
VLE stage										5.1
Tools										2.8
Usability										2.5
Accessibility										2.0
e-Learning Strategy										3.9
Decisions/Projects										3.4
Pedagogy										2.9
Learning Material										2.0
Training										3.1
Academic Workload										1.6
Costing										1.4
Planning Annually										2.7
Evaluation (e-learning)										3.4
Organisation										2.9
Tech Support to Staff										3.3
Quality Assurance										2.8
Staff Recognition										2.1
Decisions/Programmes										2.7
Quality Enhancement										3.5

Supplementary criteria - examples

- IT reliability
- Market research, competitor research
- IPR
- Research outputs from e-learning
- Help Desk
- Management of student expectations
- Student satisfaction
- Web 2.0 pedagogy

Local criteria

- Institutions can track their own “local criteria”
- But this is rarely done
 - It is actually very hard to craft good criterion statements

Slices (departments etc)

- As well as benchmarking the whole institution, it is wise to look at a few “slices”:
- Schools, Faculties,, Programmes...
- Useful to give a context to scores
- Do not do too many
- Slices need not be organisational
 - Distance learning...
 - Thematic or dimensional slices like HR, costs...
- Most other systems also now use this approach

Evidence and Process

Iterative Self-Review for public criterion systems

The Iterative Self-Review Process

- For all the methodologies we deployed, we use an **Iterative Self-Review Process**
- The methodologies do NOT require it – it was what our UK institutions desired, for all the public criterion systems – strong resistance to documentary review
- It encourages a more senior level of participation from the institution: the result is *theirs*, not the assessors
- It allows them to get comfortable with the criteria as they apply to their institution
- And move directly to implementation of change
- But it selects against complex methodologies
- And requires more effort from assessors

Iterative Self-Review details

- **Introductory meeting**
- Initial collection of evidence
- Selection of supplementary criteria
- **Mid-process meeting**
- Further collection of evidence
- **Scoring rehearsal meeting**
- Final tweaks on and chasing of evidence
- **Scoring meeting**

- **Reflection meeting – to move to change**

How to handle evidence

- Have a “file” for each criterion
- Institutions normally group criteria according to their own L&T strategy or in terms of “owning” departments
 - We also supply some standard groupings, e.g. based on MIT90s, but few use these

Peer review

- Peer review exists in the Iterated Self Review model:
 - Specialist assessors (normally two nowadays) have experience in the sector
 - Often, the benchmarking is done in a benchmarking cohort and the leaders of each HEI in the cohort form a peer group

Distance Learning Benchmarking Club

- A work package in the JISC Curriculum Delivery project DUCKLING at the University of Leicester
- A number (7) of institutions in UK and beyond will be benchmarked this year
 - And again next year (Sept-Oct 2010)
 - The aim is to baseline and then measure incremental progress in e-learning

Members

- University of Leicester (UK)
- University of Liverpool (UK)
- University of Southern Queensland (Australia)
- Massey University (NZ)
- Thompson Rivers University (Canada)
- Lund University (Sweden)
- KTH (Sweden)

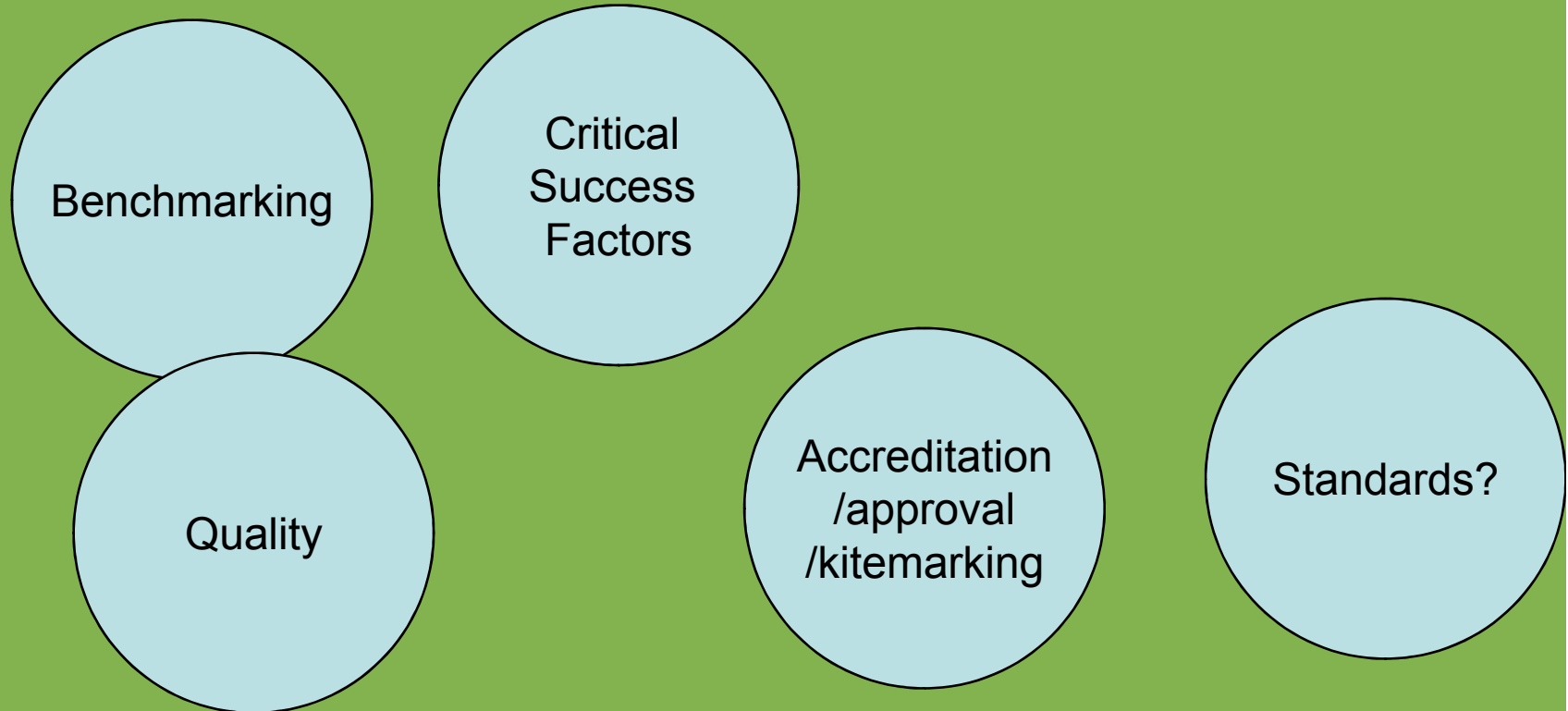
Process

- Institutions will work in a virtual cohort using teleconferencing
- Pick&Mix will be used – with an adjusted set of Core Criteria to take account of:
 - Updated analysis of earlier benchmarking phases
 - Critical Success Factors for large dual-mode institutions
 - The need for expeditious working

4. Implications for QA in e-learning

My thoughts

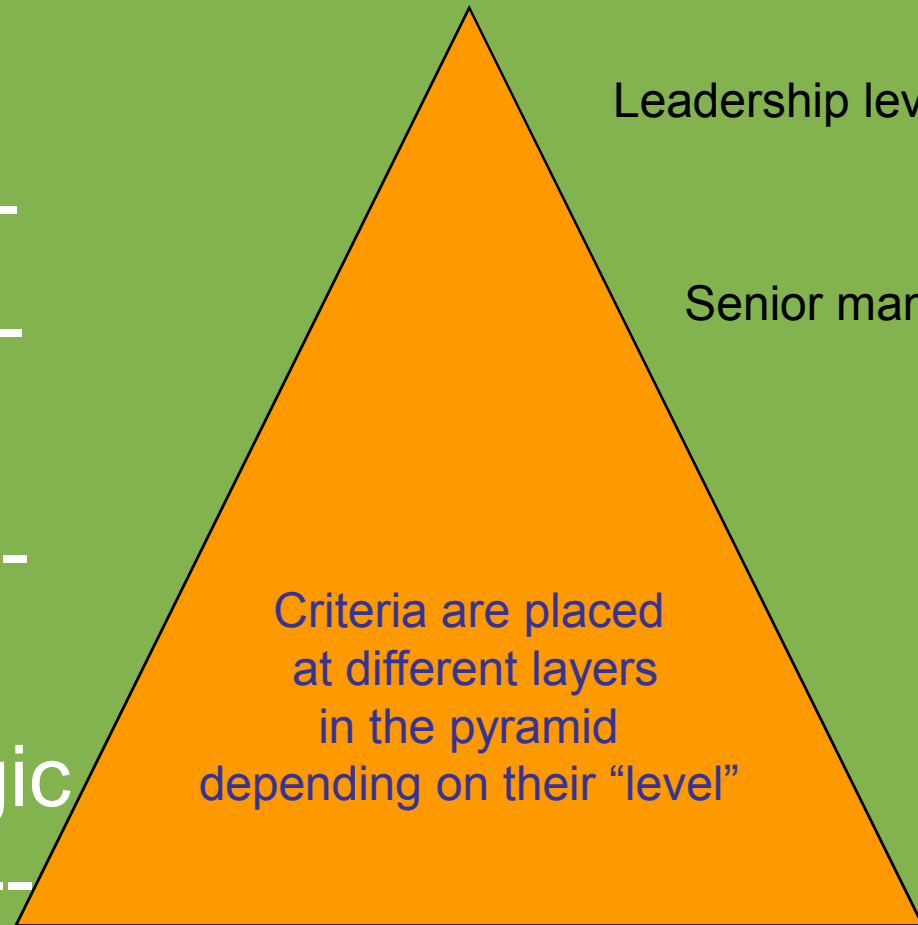
Too many concepts



E-learning is only a small part of the quality process –
how can agencies and assessors handle five variants of the concept
across many separate methodologies?

My view - the pyramid

- Critical Success Factors -----
- Benchmarking ----
- Quality -----
- Detailed pedagogic guidelines -----



Benchmarking frameworks

- It is implausible that there will be a global scheme or even continent-wide schemes for benchmarking
- But common vocabulary and principles can be enunciated – e.g. for **public criterion systems**:
 - Criteria should be public, understandable, concise and relatively stable – and not politicised or fudged
 - Criteria choice should be justified from field experience and the literature
 - Core and supplementary criteria should be differentiated for each jurisdiction
 - Core criteria should be under 40 in number
 - The number of scoring levels should be 4, 5 or 6

Concordances

- *Mappings* between systems are hard and rarely useful (Bacsich and Marshall, *passim*)
- *Concordances* of systems are easier and helpful – e.g. to reduce the burden of benchmarking with a new methodology
 - Such approaches will be used in the Distance Learning Benchmarking Club
 - for E-xcellence+/ESMU and ACODE

Experience on methodologies

- Methodologies do not survive without regular updating by a design authority
 - this is difficult in a leaderless group context
- Forking of methodologies needs dealt with by folding updates back to the core system
 - otherwise survival is affected
- Complex methodologies do not survive well
- A public criterion system allows confidence, transparency, and grounding in institutions

References

A key paper on the international aspects is

“BENCHMARKING E-LEARNING IN UK UNIVERSITIES: LESSONS FROM AND FOR THE INTERNATIONAL CONTEXT”, in *Proceedings of the ICDE conference M-2009* at http://www.ou.nl/Docs/Campagnes/ICDE2009/Papers/Final_Paper_338Bacsich.pdf.

A specific chapter on the UK HE benchmarking programme methodologies is:

“Benchmarking e-learning in UK universities – the methodologies”, in Mayes, J.T., Morrison, D., Bullen, P., Mellar, H., and Oliver, M.(Eds.) *Transformation in Higher Education through Technology-Enhanced Learning*, York: Higher Education Academy, 2009 (expected late 2009)