FSSG
Financial Sustainability
Strategy Group

TRAC
DEVELOPMENT
GROUP
Supporting and understanding
financial sustainability

Different by design – exploring alternative delivery of undergraduate provision; benefits and opportunities

September 2018

Foreword

The development of non-traditional delivery methods within Higher Education (HE) for undergraduate (UG) programmes can provide a diversified offer to enable a broader audience to engage with HE and to support sustainable institutional finances. Whilst still relatively small-scale for the sector, our study, which commenced in May 2017, found some institutions clearly energised by their entrepreneurial and pioneering developments, with benefits translating across to their broader portfolio of programmes.

Our work uncovered many positive experiences for the student, institutions and employers from the development of different delivery methods, but also a number of challenges to overcome. It was clear that successful development and implementation in this area needs to fit alongside the culture and mission of an institution. For those in our study enthusiastic and visible senior leadership was a common enabler of success along with clarity of purpose. These are not surprising or exclusive ingredients here but we were struck by the potential impact for rapid change to the range of provision and the resulting diversification of income sources across the sector.

Our work across degree apprenticeships, distance learning and condensed degrees confirmed that these methods of delivery now form a relatively small proportion of UG programmes. However, anecdotally, some institutions expect significant future growth and expect it to be sustainable over the longer term. Part of this hinges on degree apprenticeships, where ambitious levels of institutional commitment for developments are not yet coming on stream as quickly as hoped through the approvals system. More work is also needed to help potential applicants understand the opportunity. Speedy progress is crucial to facilitate growth and support effective engagement with employers to produce graduates aligned with the UK's industrial strategy.

We set out to appraise the cost of different delivery methods and determine their sustainability. This has been a challenge and we found institutions to be at different points of development. Many providers have started small scale and grown organically. However for larger scale developments, institutions recognise the importance of a more robust approach to business and financial planning. This will become increasingly important as arrangements become more complex.

From discussions we have had with Vice-Chancellors (VCs), Pro-Vice-Chancellors (PVCs) and Heads of Department, we were struck by their positivity. Many institutions quoted with pride the impact for all students from their developments of alternative delivery methods. They found new ways of working closely with employers, evaluating student progress and felt better able to measure risk and reward. They felt emboldened by their successes in winning the hearts and minds of staff, developing new partnerships, achieving greater recognition in the market and positive feedback from students. There were also examples of courses or partners which did not meet expectations and had to be discontinued. However, others grew in their place.

This report therefore aims to support those embarking on developing new ways of delivering UG programmes. Challenging the norm is never an easy task and I hope you find both strategic and tactical solutions in this report to help you. It should also help challenge those institutions already pursuing a different delivery agenda to reach further and faster. It includes many experiences from others across the UK which I hope you find stimulating and as exciting as they do.

Sarah Randall-Paley

Director of Finance, Lancaster University

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1. Executive summary

1.1. Background and context

This study was commissioned by the Transparent Approach to Costing (TRAC) Development Group (TDG) in May 2017 to complement the Financial Sustainability Strategy Group's (FSSG's) work on understanding income cross-flows. This study set out to provide insights, drawn from existing HE institutions, on the development and delivery of undergraduate provision via alternative methods. TDG recognised that this is an emerging, but important issue that provides both opportunity and challenge to the HE sector. It was agreed that a collaborative review with the sector, leading to tangible good practice, would be beneficial. FSSG, to which TDG reports, at the same time commenced a project to assess and better understand the income cross flows that occur in the HE sector. FSSG recognised the complementarity of the TDG project with its own income cross flows project and has maintained oversight of the TDG project.

The UK requires individuals with the right skills in the right regions of the UK to support employers and enable the delivery of the UK Industrial Strategy. The Government has introduced the Apprenticeship Levy in England and has made changes to increase the attraction of condensed degrees. The Apprenticeship Levy is a UK Government employment tax that came into effect on 6 April 2017. It is collected across the whole of the UK. All employers (public, private and third sector) with a pay bill of more than £3 million pay the levy set at 0.5% of their annual wage bill. Only in England, the levy is administered through the Apprenticeship Service. In Scotland, the Skills Development Scotland agency contracts for the delivery of places including graduate apprenticeships from approved training providers. In Wales, the Welsh Government delivers its Apprenticeship Programme via its apprenticeship provider network and in Northern Ireland, the Department of the Economy oversees how levy money is used to support workforce development via ApprenticeshipsNI[1].

These together with other reforms to the HE sector are intended to stimulate greater variety in the HE provision on offer. As institutions are reacting to these changes, there will be a learning curve for all and strategies will be determined to best support institutions in exploring and developing HE provision via these alternative methods. This study therefore provides a tool to support institutions in embracing government policies around apprenticeships and diversified delivery methods for undergraduate teaching.

The TDG formed an Oversight Group for this project, chaired by Sarah Randall-Paley, the Director of Finance for Lancaster University. The TRAC Support Unit worked with the Oversight Group to deliver the project. The approach encompassed a document review, a survey to the Higher Education (HE) sector and a small number of visits to institutions to learn about their experiences in developing alternative delivery methods. There is a diverse range of provision delivered by non-traditional methods within HE for undergraduate (UG) programmes, but the Oversight Group agreed that this review would focus on the different delivery approaches of UG apprenticeships, distance learning and condensed degrees as they were found to be the most significant routes that were being explored and implemented. The group recognised that in Wales, only further education colleges and private providers provide apprenticeships. In practice the review drew findings predominantly from UG provision and some limited postgraduate (PG) course experiences. A relatively small number of

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[1]   More information on the different approaches to apprenticeships across the UK is available at https://secure.sqa.org.uk/sqa/files_ccc/guide-to-apprenticeships-leaflet.pdf

institutions participated in a series of case study discussions. The findings from this study may equally be applicable to the provision of PG courses.

The review sought to explore the costs and impact on financial sustainability of different delivery methods. Early in this work it became apparent that this would not be possible from the three areas selected to the extent that was first envisaged. The sector not does routinely collect data on different delivery methods within HE for UG programmes in terms that make cost understanding and comparisons readily accessible and usable. Further challenges to any meaningful financial assessment were the organic nature of development of different delivery methods that many institutions described and the relatively embryonic stage of different delivery methods in the sector. The study therefore sought to identify the types and areas of investment and benefit that institutions had experienced from the three areas selected in order to add some context and insight to the challenges of developing different delivery methods.

1.2.   Key findings

1.2.1.   Delivery via alternative delivery methods is growing

Distance learning is not new in the HE sector. Of the 35 respondents to the survey, 69% stated that they delivered some programmes via distance learning. Condensed degrees have been difficult to isolate from existing data, but more readily have been higher and degree apprenticeships that are new, and stimulated to some extent by the introduction of the apprenticeship levy. Taken together the volume of provision delivered via these different delivery methods is small. The 2015-16 Higher Education Statistics Agency (HESA) Student Return found the following proportion of undergraduate delivery on a headcount basis:

- Distance learning – 8.8%
- Degree apprenticeships – less than 1%
- Condensed degrees – 16.4%[2]

For condensed degrees part of the scale relates to part-time students. A majority of institutions, but not all, predict growth in these methods of delivery. The Department for Education cited growth of 37.4% in England from 2015-16 to 2016-17 in higher level apprenticeships in October 2017 of which degree level apprenticeships form a proportion.

1.2.2.   Key challenges

The review has identified a number of challenges that institutions have overcome in developing their different delivery methods.

It is important to note, however, that these have not deterred institutions from progressing different delivery methods. It has just required them to adapt. Many of the challenges are common across the three different delivery methods covered by this review.

1) **Gauging student demand** – Approaches adopted have varied in their sophistication. However, even where there has been a conscious focus on assessing demand, the actual enrolments have not always been in line with what was predicted. In addition the extent of future demand is

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[2]   To estimate condensed degrees the Higher Education Funding Council for England (HEFCE) provided a proxy using a definition of 'long' that it used for funding purposes. It is likely to contain a mix of 'shortened' degrees also available as a longer one and 'short' degrees which do not have a longer equivalent.

unclear in many areas. This may pose long-term challenges for institutions pursuing different delivery methods as a way of addressing financial sustainability;

2) **Gaining staff buy-in** – a different delivery method often requires changes in the pattern of delivery, working hours and / or working practices. Institutions have commonly found there to be pockets of resistance from existing staff to these required changes, but not to the extent that was first envisaged;

3) **Engagement and communication with students** – Existing methods of communication and the patterns of face-to-face contact with students are not always appropriate for a different delivery method;

4) **Working at pace to meet employer and student demand** – Institutions reported that 'first mover advantage' is key to future success. It was also the case that employers require institutions to work at pace. Institutions commented that this does not always fit with existing working practices, for example, long established approvals processes on longer timescales;

5) **Delays in gaining approval for apprenticeship standards** – There was a unanimous view that greater speed in approving apprenticeship standards would improve institutions' ability to meet the various demands that currently exist for degree apprenticeships;

6) **Employer understanding of apprenticeships** – Recent reports and institutions reported that employers do not typically understand the apprenticeship process and that a number were accepting the apprenticeship levy as a further tax, rather than engaging in drawing it down to support training and development of its workforce;

7) **Regulatory complexity** – Depending on the different delivery method followed, institutions have needed to engage with the Institute for Apprenticeships (IfA), the Higher Education Funding Council for England (HEFCE) and the Education and Skills Funding Agency (EFSA). This was felt to be overly complex;

8) **Lead time and funding of development for distance learning** – Institutions reported that learning platforms needed to be implemented and materials adapted for on-line delivery. This commonly required 'up-front' investment and took time working with third parties to deliver the technology required; and

9) **Understanding and perception of condensed degrees** – It was reported that currently, condensed degrees are not sufficiently understood by prospective students and that they are perceived to be of lesser standing than a degree obtained through a normal pathway.

As is outlined below, different delivery methods have achieved a range of benefits that have had a positive impact on the broader undergraduate provision.

1.2.3.   Successful approaches to delivering different methods

Although developing different delivery methods presents a range of challenges, institutions have identified successful strategies for overcoming them. Examples of these approaches are given below and further detail in Appendix 1:

1) **A clear strategic vision and fit** – Institutions found positive governing body and staff engagement when the different delivery method aligned clearly with the strategy of the institution;

2) **Passionate and sustained senior leadership** – To overcome pockets of staff resistance to developing and delivering different delivery methods, institutions reported that active and sustained senior leadership is very important;

3) **Clear risk appetite and parameters for development** – Institutions reported that the organic nature of the provision means that a business case may not deliver a short term return. Therefore institutions had engaged with their boards to define parameters for development with a clear view of the risk appetite. This then enabled controlled development without it being stifled, whilst maintaining clear accountability for progress; and

4) **Development of partnerships that provide cultural fit and strategic alignment as well as a commercial return** – A key success factor for working with partners was cultural alignment and shared values. This enabled easier joint working.

1.2.4. Benefits of delivering UG provision via alternative methods

The relatively small number of institutions involved in the review are passionate about the benefits of diversifying their approaches to delivery. The common benefits that have been achieved are summarised as follows:

- **Engagement of people in HE who would not have pursued higher level study** – A number of institutions agreed that they have attracted students engaging in non-traditional delivery methods for UG programmes that would not otherwise have entered HE. The different teaching and engagement patterns provided flexibility which meant that study could work around other commitments and demands;

- **Enrichment of existing programmes** – Overcoming the challenges of communication and staff buy-in had provided a catalyst for innovation in existing programmes. The development of more on-line content had also enabled this to be integrated into programmes delivered by traditional means. One institution reported that its on-line and on campus learning will ultimately merge;

- **New and improved relationships with employers** – Employer engagement is key to the success of apprenticeships and institutions have found that this is a catalyst for developing broader relationships with a range of employers. Some institutions work with leading global firms in developing their apprenticeships;

- **Challenge of existing working practices and processes** – Different delivery methods require back office, governance and communication processes to evolve. This has enabled greater focus on student needs and has promoted student centric services in a number of cases; and

- **Enabling growth** – Although student volumes are still small, the development of different delivery methods provides a platform for further growth by enabling institutions to access a broader range of prospective students.

1.2.5. Opportunities for policy makers

The HE sector is embracing significant change, and this review has identified a great deal of enthusiasm for pursuing different delivery methods. However, three areas have been identified where there are opportunities for policy makers and Government to further enable institutions to

embrace the apprenticeship and diversified delivery agenda and meet employer needs more effectively. These suggestions are as follows:

- **Expediting the approval of apprenticeship standards** – As at January 2018 308 out of 531 registered apprenticeship standards were awaiting approval (58%). Institutions reported that this is limiting the delivery of apprenticeships that meet employer needs. It could also be eroding employers' confidence in the apprenticeship agenda. Clear targets for each step of the process may help calibrate expectations;

- **Increased communication and education on apprenticeships and condensed degrees** – Institutions are working to educate and create demand for these forms of provision. However, institutions felt that more could be done within schools to inform pupils and careers services about condensed or flexible modes of study as an option for undergraduate study. Equally, continued engagement and publicity of apprenticeships to employers is important;

- **Data collection that better identifies different delivery methods** – There are a range of different delivery methods, but these can be difficult to identify in the HESA Student Return. Funders may wish to consider requiring these to be more easily identifiable in the HESA return, which would in turn enable improved reporting and tracking of progress with the diversification of delivery methods for undergraduate teaching. This would enhance the evidence base for demonstrating the progress made against key policy objectives of government.

The development of the IfA website has helped explain its processes in a variety of ways. Its current format is in beta and users are encouraged to provide feedback.

The following graphic summarises the review's key aspects.

Key facts

The scale of Alternative Delivery Methods across the higher education sector is **relatively low**

For 2015-16 distance learning was **8.8**%

And degree apprenticeships were less than **1%**

for undergraduate provision in England and Scotland
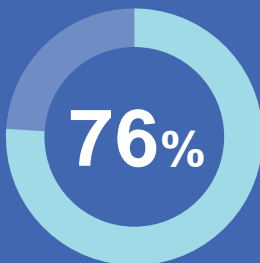
76% Of surveyed institutions that were not delivering apprenticeships currently indicated that they were likely to develop this provision in the future

Drivers for success
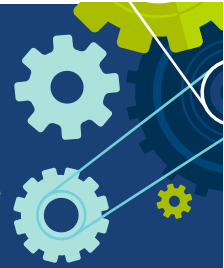
Deliver a clear vision with visible, passionate leadership

Communicate clearly on purpose and progress

Play to your strengths but do not be constrained by the traditional model and build provision which has cultural fit

Risks and challenges

Obtaining accurate student demand

Addressing staff concerns

Keeping up the pace of change

Benefits

+ Reaching new audiences

+ A catalyst for innovation and new mind-set

+ Constructive challenge to existing systems and processes
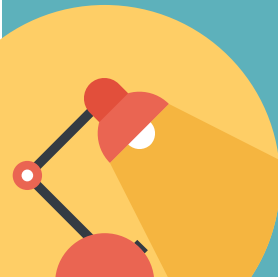
External support is needed to

Speed up approval of degree apprenticeships standards

Develop more consistent terminology and data collection to help identify, classify and assess future Alternative Delivery Methods

Better inform school leavers on the alternatives available

2. Introduction

This section sets out the background to this study and its aims and objectives. It explains the changes to the scope made during the review and summarises the approach taken to determine the findings reported.

2.1. Background

Since 2015 the Government has removed the cap on the number of students that institutions can recruit applicable to England and Wales. In Scotland and Northern Ireland student number controls continue to exist. The Government has further encouraged a market approach to higher education by increasing fee limits and developments to stimulate competition and encourage disruptive innovation. The development of non-traditional delivery methods within HE for UG programmes is seen as a mechanism to open up access and create courses different to the traditional three year programme that will meet employers' needs and improve student satisfaction.

Government policy reforms have seen the development and expansion of apprenticeships, accompanied by the introduction of the apprenticeship levy in 2017. Historically this has been seen as an agenda solely for the Further Education sector, but with the introduction of both the levy and degree apprenticeships, this is a form of UG provision that is being pursued actively in the HE sector.

The recent Higher Education Commission report[3] noted that there has '*been relatively little movement in HE delivered through … accelerated degree courses*'. However the overall trend in different delivery models is not easy to measure, in part due to the absence of market research, accepted definitions and complexity in the market across different types of institutions. Is a distance learning accelerated degree, accelerated or distance learning? Whilst the decline in part-time degrees is well documented, some areas appear to have grown. Notably, participation has increased in higher level apprenticeships by 37.4%[4].

Condensed degrees are being encouraged by Government. In England the fees that institutions can charge for these degrees has been increased, relative to the two years of fees at the current rate for a more conventional degree. These alternative forms of delivery are seen in some quarters of the education landscape, as important to driving forward the UK's industrial strategy and creating broader access to HE provision.

Whilst the dominant factors for this demand can be debated, their relative priority and impact on provision is not the main focus of this review. Pursuing new opportunities, innovating and diversifying current approaches to delivery is generally viewed as positive, but for this review it is important that the risks and costs of this UG provision are understood as well as the benefits, such that the sustainability of institutions is not adversely affected. Part of this includes how institutions can best assess demand and their approach to the market.

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[3]   Higher Education Commission, September 2017, One Size Won't Fit All – The Challenges Facing the Office for Students, www.policyconnect.org.uk/hec/sites/site_hec/files/report/455/fieldreportdownload/hec-web.pdf

[4]   Department for Education, Further Education and Skills in England, statistical first release 53/2017, 12 October 2017.

2.2.   Aims and objectives of this review

The aim of this work is to support institutions in pursuing government requirements and expectations in respect of apprenticeship delivery and the diversification of delivery methods for undergraduate teaching. These agendas aim to provide greater choice for prospective students and employers.

The study aims to support the sustainability of institutions by providing a source of reference for institutions to consider when developing non-traditional delivery methods within HE for UG programmes. The review has produced a series of case studies and reference materials to provide greater understanding of the resource consumption associated with the different delivery methods.

Part of the review sought to explore the costs and impact on financial sustainability of different delivery methods. Early in this work it became apparent that the competitive environment for students would hinder the extent that meaningful cost comparisons could be collected and shared. The sector not does routinely collect data on different delivery methods in terms that make cost understanding and comparisons easy. Further challenges to any meaningful financial assessment were the organic nature of development of different delivery methods that many institutions described and the relatively embryonic scale of different delivery methods in the sector. The study therefore sought to identify the types and areas of investment and benefit that institutions had experienced in order to add some context and insight to the challenges of developing different delivery methods.

Further details on the terms of reference for this review are provided in Appendix 2.

2.3.   Scope of review

The review was commissioned by TDG, supported by FSSG, in May 2017. The review covers undergraduate provision provided by publicly funded higher education institutions. The review was undertaken in advance of the regulatory changes in England and the creation of the Office for Students.

Different delivery methods were deemed to constitute methods of delivery that were different to the more traditional way of delivering undergraduate degrees, for example, over a three-year campus based, full-time period of study. A number of different delivery methods were considered in scoping this review. Each presented a range of interest and risks to delivery of the review but the following were selected:

- Degree apprenticeships;
- Accelerated or condensed or use of summer time to shorten the overall course length; and
- Distance learning and massive open online courses (MOOCs).

In summary these modes were considered interesting for review because of the impact of technology that could be explored via case studies, their competitive nature and different stages of development, their impact on an institution's culture, the risks that could materialise in their development and their impact on structures for institutions.

It was determined by the Oversight Group for the review that an international perspective, beyond those students studying via distance learning, would not be part of this review and would probably merit a review in its own right. Whilst British universities have significantly grown their overseas campuses in recent years and therefore this is likely to be of interest to readers, the Oversight Group

concluded that the provision had variations, complexities, risks and investment considerations that would require a different approach to understand fully. A US 2012 classification of Transnational Education (TNE) models[5] identified nine different types of arrangements (overseas campuses being one) and noted that whilst these were based on common practices, variations exist including hybrids within each of the six models.

The review sought to explore the costs and impact on financial sustainability of different delivery methods. Early in this work it became apparent that this would not be possible to the extent that was first envisaged. The sector not does routinely collect data on different delivery methods in terms that make cost understanding and comparisons readily accessible and usable. Further challenges to any meaningful financial assessment were the organic nature of development of different delivery methods that many institutions described and the relatively embryonic stage of different delivery methods in the sector. The study therefore sought to identify the types and areas of investment and benefit that institutions had experienced in order to add some context and insight to the challenges of developing different delivery methods.

Private sector higher education provision in these modes of delivery is not reviewed directly as part of this work but considered through its impact on and response by HE institutions.

For the avoidance of doubt and confusion over delivery methods within HE for UG programmes provided by private sector companies, the term 'alternative provision' when used in this report does not refer to provision delivered by private providers.

2.4.   Approach to the review

An Oversight Group was formed to oversee and guide the project. The Oversight Group was chaired by Sarah Randall-Paley, (Director of Finance of Lancaster University and a member of the TRAC Development Group). The group comprised financial and academic expertise and further details of the group's membership are provided in Appendix 3.

The Oversight Group determined the delivery methods most relevant to the scope of this review. These were widely accepted as a mix of new, developmental and existing different delivery methods best suited to the objectives of the study.

The role of the Oversight Group was to share its collective experience to guide and inform the project in addition to ensuring the project was delivered on time. It met four times formally during the course of the work and considered a number of papers outside of these times. It oversaw the delivery of the review across five stages:

1) Review of existing research
2) Desktop review of volumes and types of provision currently delivered
3) Survey development and execution
4) Case study visits
5) Report drafting and completion

The Oversight Group selected three different types of UG delivery for further consideration and exploration in the study drawing on the findings and discussions arising from:

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[5]   World Education News and Reviews, August 2012, Understanding Transnational Education, Its Growth and Implications, Knight J, www.wenr.wes.org/2012/08/wenr-august-2012-understanding-transnational-education-its-growth-and-implications

- The desktop and research into the scale and range of current provision;
- Research findings; and
- The Financial Sustainability Strategy Group conference held on 23 May 2017[6].

The Oversight Group also oversaw the development and execution of a survey to the sector. Institutions from England, Northern Ireland, Scotland and Wales were invited to respond to eight questions that were aimed at gaining an understanding of the different methods of delivery that institutions are or plan to adopt. In addition to obtaining further information from institutions on their experience and reasons for different delivery methods, the survey was designed to support the identification, selection and engagement with institutions for the case study visits and the methods of delivery to focus on.

In the survey institutions were asked to indicate whether they would be willing to participate further in the review. The Oversight Group reviewed the survey information together with their knowledge of institutions that were known for their innovative approach or diverse provision. Institutions were identified for further participation in the review. The aim of the selected institutions was to provide coverage of each country, different sizes and missions of institutions.

From this pool of target institutions, eight institutions agreed to participate in the case study stage of the review. England, Wales and Scotland were represented in the visits undertaken and the institutions provided insight into a range of different delivery method experiences, based on their survey returns across each of the three delivery methods selected. A list of participating institutions is provided in Appendix 4.

To maximise the contribution and benefit from the case study visits, the review adopted a working principle to keep each institution's insights and experiences anonymous. The review did not make any further requests to institutions to publish their name.

2.5.   Acknowledgements

A key part of the review was to engage effectively with key stakeholders. This was achieved through a combination of one-to-one meetings, phone-call and email support, and group meetings. We detail below the groups that we would like to thank for their contribution, co-operation and assistance with this study. Particular thanks goes to:

- all the participating institutions, both those that completed survey responses and participated in the case study visits for their time and willingness to share experiences and insights; and
- the Oversight Group members for sharing their own experiences and guidance throughout the review.

2.6.   Structure of this report

This report contains the following sections:

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[6]   Details of the Financial Sustainability Strategy Group conference, 'Competing and thriving in the new HE environment: Changes and challenges to the HE business model and the impact on financial sustainability' and its supporting materials are available at
www.hefce.ac.uk/funding/finsustain/events/FSSGconferenceMay17/

- Scale of alternative delivery methods;
- Key risks and barriers;
- The benefits from different delivery methods;
- Success factors for different delivery methods;
- Glossary; and
- Appendices.

3. Scale of undergraduate provision delivered via alternative methods

The purpose of this section is to provide an indication of the size and nature of the UG different delivery method currently provided in the HE sector. Our survey also indicated how different delivery methods might be expected to develop in the future.

3.1. Overview

Different delivery methods across the higher education sector are relatively low in comparison to their overall population of students. From HESA data[7], as a percentage of the 2015-16 student headcount, we found that:

- Distance learning was 8.8%;
- Degree apprenticeships was less than 1%; and
- Condensed degrees (accelerated, compressed or fast-track) was 16.4%. As the data collections do not separately identify condensed degrees, HEFCE provided a proxy using a definition of 'long' that it used for funding purposes for cases with a start to end date indicating a two-year programme. It is likely to contain a mix of 'shortened' degrees also available as a longer one and 'short' degrees which do not have a longer equivalent. Some part-time degrees are included within this definition. Further detail is provided in Appendix 5.

Growth in these areas is anticipated by institutions, especially in degree apprenticeships. Statistics released by the Department for Education in October 2017 reported a significant increase in higher level apprenticeship participation for the 2016-2016-7 academic year. The number enrolled in higher level apprenticeships that includes degree level rose by over a third (37.4%)[8].

3.2. Broader research findings

A summary of research evidence reviewed is provided at Appendix 6. The research found that the nature and scale of provision was similar to that from this study's work:

- Different institutions used different terms to describe similar provision, especially in describing studies completed in a shorter period of time than the 'norm'. This made it difficult to identify the full extent of provision in the sector. Appendix 5 sets out some of the assumptions used to determine the scale of provision for this study from the desktop review of the provision, for example for condensed degrees.

- Different delivery methods were varied in nature. Common areas are:

  1) Apprenticeships;
  2) Fast track, condensed or accelerated degrees;
  3) Distance Learning;
  4) Work-based learning;
  5) Part-time learning; and

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[7] Our analysis was restricted to English and Scottish Higher Education Institutions using HESA's 'standard HE registration population'. See Appendix 5 for details.

[8] Department for Education, October 2017, www.gov.uk/government/uploads/system/uploads/attachment_data/file/650515/SFR53_2017_FINAL.pdf

6) Blended learning.

- Different delivery methods were limited in scale.

- Provision is skewed towards certain types of institutions and subjects. The private sector provision in 2014-15 was mainly in business, administration, retail and leisure awards (54.3% of the total provision by the private sector) and arts and communication (16.5%)[9].

The research and document review also highlighted a range of views on the challenges of different delivery methods (mainly on accelerated learning of various forms), see Appendix 6 for further details. The Russell Group response to a then Department for Business Innovation and Skills (BIS) Call for Evidence on accelerated courses set out three key points to explain why this different delivery method is problematic for these institutions:

- Shortened courses would require academics to teach in periods typically designated for research, making the provision of research-led teaching extremely difficult;
- Accelerated degrees could also limit the time for independent learning and reflection as well as reducing opportunities to take part in programmes designed to develop employability skills; and
- Condensing three years of teaching into two without altering the financing model under which annual tuition fees are capped would also prove financially unsustainable.

Furthermore, a literature review of accelerated degrees in HE by the Institute for Employment Studies[10] found that take-up was inhibited by the perception that these degrees were of inferior quality. In addition, it found that for:

- **Institutions** – the perception that these courses were more costly to develop and deliver and do not fit well within the current funding system; and for
- **Students** – they had a lack of awareness of this option, a strong cultural norm for the traditional approach and concerns about having a less satisfying and more limited student experience; perceptions that it would involve a heavy workload with less time for reflection and deep learning, and lead to lower outcomes and higher living costs per year coupled with less time to do paid work.

At the same time, institutions reported some evidence that suggests different delivery methods produce satisfaction and learning outcomes that are at least the same, if not better than their traditional equivalent. However, it recognised that this may be driven by the characteristics, preferences and motivations of the kinds of students attracted to accelerated study. An evaluation of the HEFCE-funded Flexible Learning Pathfinder projects published in 2011[11] also found that there was some

9   HESA Student Record 2014/15; SFA Individualised Learner Record 2014/15, HESA Alternative Providers Experimental Statistical First Release, 2014/15 found in the Universities UK report, Higher Education in England: Provision, Skills And Graduates, September 2016, www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/2016/higher-education-in-england-provision-skills-and-graduates.pdf

10   Accelerated degrees in Higher Education – Literature review, Institute for Employment Studies, March 2017, www.gov.uk/government/uploads/system/uploads/attachment_data/file/595637/Accelerated_Degrees_Literature_Review.pdf

11   Final evaluation of the HEFCE-funded Flexible Learning Pathfinder projects, Higher Education Academy, 2011, www.heacademy.ac.uk/knowledge-hub/final-evaluation-hefce-funded-flexible-learning-pathfinder-projects

evidence of support by employers and professional bodies for flexible provision, including accelerated degrees.

An older costing study of different modes of off-campus delivery of higher education[12] (including distance learning) concluded that on a long-term basis these modes were usually more costly, but need not always be significantly more costly and that if growth is significant it may lead to economies of scale.

3.3.   Survey approach and highlights

To complement the desk based research, a survey was developed and undertaken across the sector. The survey contained eight questions designed to:

- Understand some of the thinking undertaken by institutions in developing different delivery methods;
- Identify the areas of different delivery methods to explore further; and
- Identify participants willing to share further details on their experiences and be part of the case study phase of work.

The survey was emailed to 170 recipients across England, Northern Ireland, Scotland and Wales. The results from 35 completed responses were analysed, a return rate of 21%. Appendix 7 provides further details on the response rate and results.

69% of institutions had distance learning provision, the leading mode after blended learning from the 35 respondents. Condensed provision was the least frequent amongst the respondents with seven institutions indicating that they had this type of provision (20% of the total). The frequency of the selected modes for this study helped to understand the range of experience for different levels of scale.

Institutions were also asked whether they had established different corporate structures (for example subsidiary companies) to service the delivery of the alternative delivery methods. Two institutions indicated that they had created wholly owned subsidiaries. One institution with different corporate structures formed part of the case studies.

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[12]   The costs of alternative modes of delivery – a study for HEFCE, JM Consulting Ltd, August 2003, http://dera.ioe.ac.uk/5170/1/rd14_03main.pdf

Chart 1 – Mix and frequency of provision from survey submissions
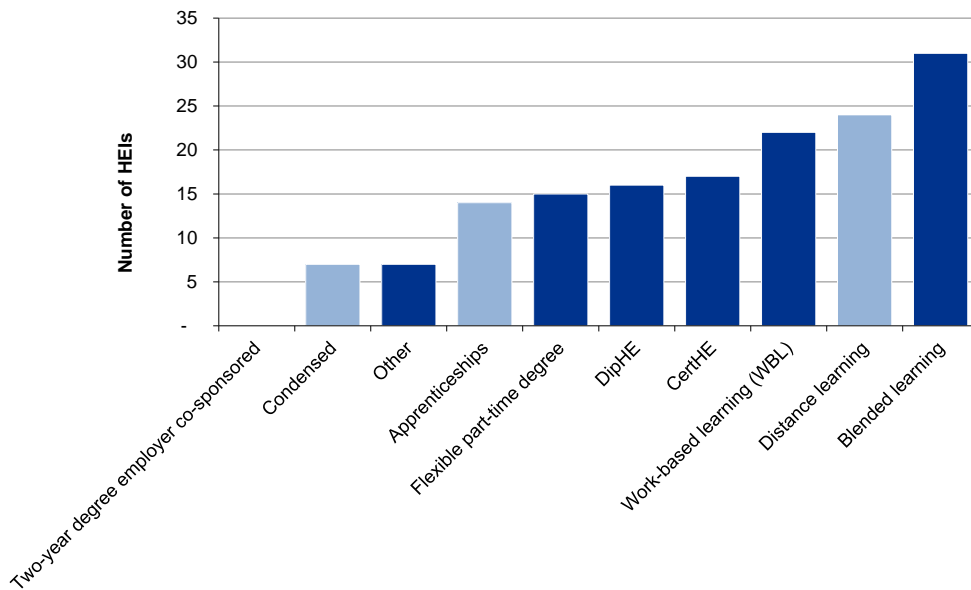
Source: Alternative provision survey September 2017

Chart 1 summarises the respondents' provision highlighting (in the lighter blue) the frequency of the three modes selected for further evaluation in this study.

The survey also explored the provision that institutions expected to develop in the future, see Chart 2. 40% of respondents with some apprenticeship provision currently and that this was likely to increase.

Chart 2 – Current UG apprenticeship provision and future institution intentions from our survey of 35

Current apprenticeship provision – 14 institutions with UG apprenticeships

Likely future apprenticeship provision of the 21 with no current apprenticeships

■ Very unlikely   ■ Quite unlikely
■ Quite likely   ■ Very likely
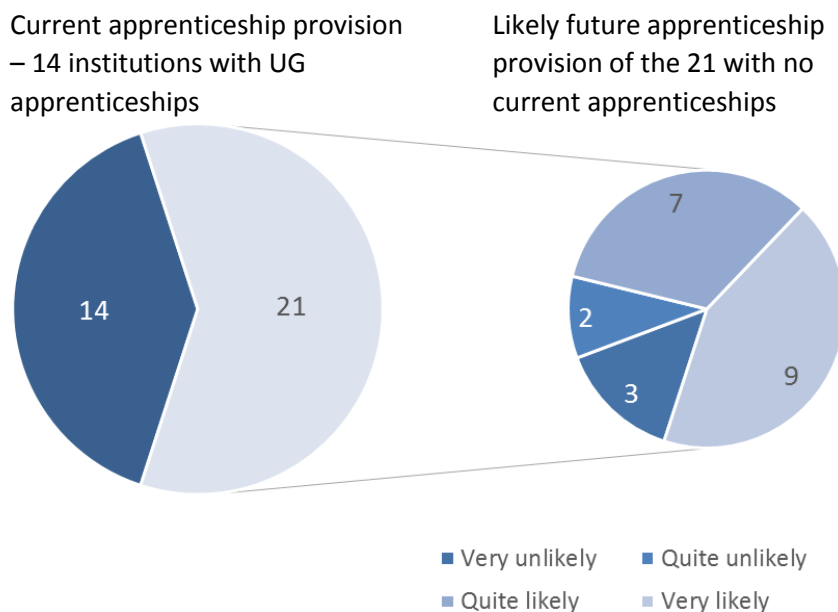
Source: Alternative provision survey September 2017

Of the 21 institutions without any current apprenticeships, 16 (7 + 9, or 76%) indicated that they were likely to develop Apprenticeship provision in the future.

4. Key risks and barriers

The risks are explored by a series of questions covered in this section. Each question is followed by findings from across the different delivery methods. Specific issues to one or more different delivery methods follow where relevant. The section begins with an overview of why institutions are developing different delivery methods.

Cases studies are also included to help illustrate an institution's approach or experience.

4.1. Why have institutions developed different delivery methods?

To understand the motivation for developing different delivery methods, institutions ranked a suggested list of factors into order of priority, from 1 as the most important, to 8 the least. Student employability and student demand were the top two reasons, within 5% of each other's score, see chart 3.

Chart 3: Frequency of motivating factors for developing different delivery methods
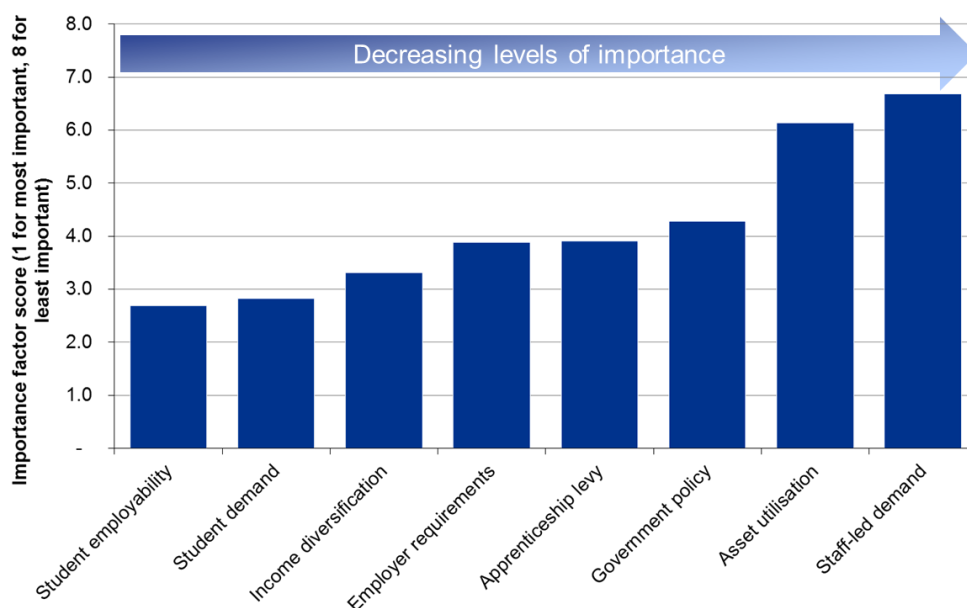
Source: Alternative provision survey September 2017

Slightly but noticeably lower in priority was income diversification, the third priority in the chart above. A group of further reasons were all closely scored; employer requirements, apprenticeship levy and Government policy. The apprenticeship levy was marginally more of a priority for those institutions without current provision compared to those with some apprenticeship provision. However this difference was marginal and did not affect the three most important factors. Improving asset utilisation and demand from staff were the least likely reasons for developing a different delivery method.

Our case study visits identified that some of these factors were inter-related. Institutions explained that there are underlying factors driving different delivery methods from those identified in the survey. These factors often reflected the culture and strategy of the institution and to an extent the desire to grow income affected them all. For example, institutions reported that the development of different delivery methods was linked to growth plans and the desire to work more in collaboration, both with local employers and internationally. Institutions described offering alternative routes as a key to expanding provision that ultimately enriches the student experience and provided more opportunity. For degree apprenticeships for example, one institution cited that:

'(*our*) *strategy is to build partnerships … and be part of the community*', '*key driver(s) is to really strengthen connections between employers and students*',

'*we see this (degree apprenticeships) as potentially a growth area in the long-term*'

In discussing this further, one institution spoke about its strategy to build partnerships with other bodies to share resources and pool knowledge and that its approach to developing apprenticeships with local employers was clearly meeting that aim. What was clear was that, where successful, the development of different delivery methods was aligned to an institution's core purpose and values, rather than being a separate 'add-on' to accommodate a different way of delivering provision.

Others were less sanguine about the potential for growth. They cited the complexity of arrangements for approval and quality oversight as limitations to growth, saying that:

'*in its current form, none of this is going to be easy for universities*'.

Our findings on apprenticeships broadly align with research undertaken by Universities UK for HEFCE. Its survey[13] identified that:

'*increased opportunities to work with employers and deepen the relationships they already have are major motivators for university involvement in the development of degree apprenticeships*.'

A number of participants explained that local factors were also drivers for these broader developments. For example, one institution explained that developing different delivery methods was part of their '*DNA*' to widen provision across their region and provide specialist areas of provision. In a sense the developments were not considered '*different*' or '*alternative*' but more of the same by another route. Another institution explained that local competition, from other Further Education bodies, meant that they had to accelerate their developments, commenting that '*this is marketization of HE in action*'.

A few institutions cited that the development of different delivery methods was an opportunity to diversify the types of programmes offered, exploit broader strengths and meet demand from both students and employers. Another reason identified during the course of this review was that different delivery methods, notably through distance learning and apprenticeships, were routes by which to develop industry credentials and contacts to further attract commercial income from separate continuing professional development courses.

Some smaller institutions reported that they needed to work harder to keep pace with developments. They also felt their size and resulting specialisms (and possible relative isolation from other centres of economic activity and HE providers) was also part of the reason for their success

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[13]   Universities UK, March 2018, Degree Apprenticeships: Realising Opportunities, www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/2017/degree-apprenticeships-realising-opportunities.pdf

with different delivery methods. They felt they needed to be more open to change and that the case for change was easier to make.

Case study 1 – what has the apprenticeship experience been like?

One institution's apprenticeship programme involves working with 120 firms including both major corporates and small and medium-sized enterprises. Its mission is:

'to work with local employers and their communities to give people alternative routes into HE, to innovate and to gain employability for its students'

With senior leadership support and a successful initial bid for investment of approximately £1m, a small unit was established to develop its apprenticeship programme. This investment was used to help design courses with employers, recruit staff to support students on placement, train employers and develop tracking and reporting systems support. Part of the cost has been tackling the complexity of the apprenticeship scheme, '*degree apprenticeships are more different and complicated (than other apprenticeships), so every step of the way is different from what a university is used to'.*

The institution has worked hard with schools and colleges to explain and promote apprenticeships. One specialist in apprenticeships spends the majority of their time visiting schools, colleges and employers advising about apprenticeship careers with teachers, parents, students and employers. The scale of the task can be daunting, for example they had visited over 35 schools last year and demand for visits continues to outstrip availability of institution staff. The institution has also established an informal network with other institutions to help share experiences and solutions, for example in how to track the funding.

Part of the challenge and reward has been the development of courses with employers. The institution used employer forums to help design courses. Where choices needed to be made across different standards, for example which computer programming language to learn, the institution helped the employer-led decision with an appropriate framework.

As a result of this development the institution reported developing strong relationships with its employers that has strengthened its own reputation and opportunities to learn from major national companies. It also has educated students that would have bypassed the higher education system and others who had previously failed their first attempt after school.

4.2. What barriers have institutions overcome in developing their different delivery methods?

4.2.1. Introduction and survey results

To identify the barriers to developing different delivery methods, institutions were asked to indicate their three top challenges from a suggested list of factors in the survey. Policy uncertainty was cited by two-thirds of respondents and over half of respondents cited technical implementation, see chart 4. Institutions were vociferous in the way these issues affected apprenticeships. This is dealt with later in this section.

Chart 4: Frequency of challenges identified in the survey of institutions
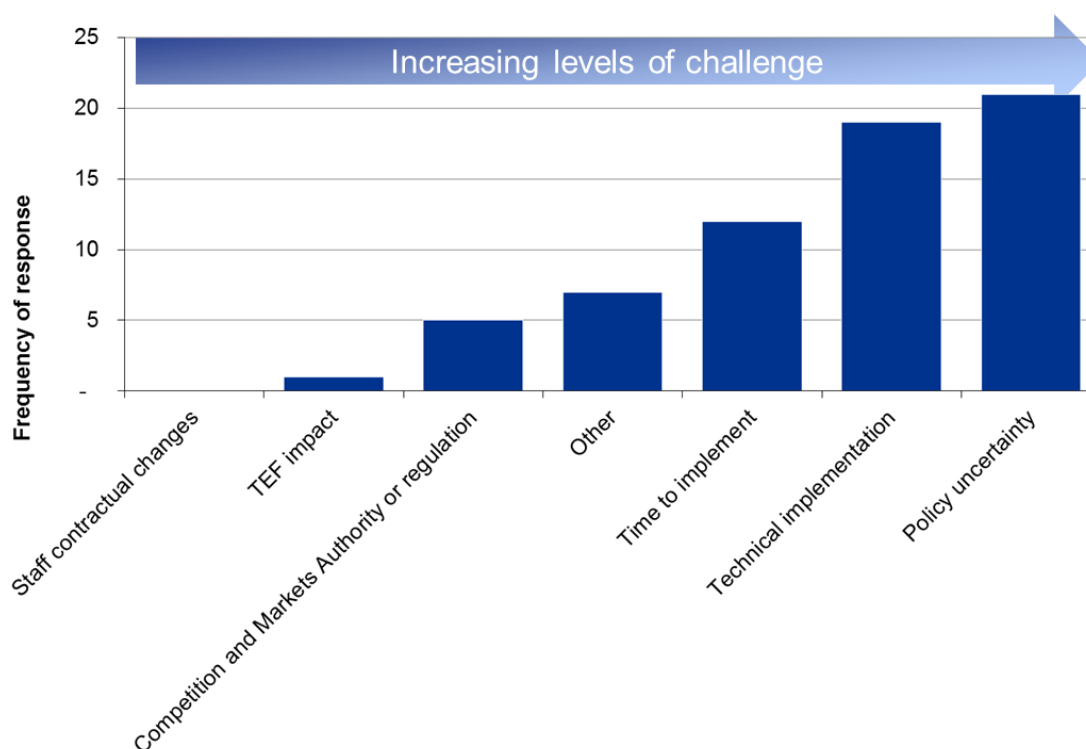
Source: Alternative provision survey September 2017

The low level of challenge identified in dealing with any changes to staff contracts was explored as part of the work with each case study participant. The technical implementation included the practical steps necessary to develop the different delivery method.

4.2.2. Common challenges to each of the three different delivery methods

In this review we identified four areas of challenge that appeared common to the three different delivery methods.

1. Gauging student demand

Institutions frequently cited the difficulty in obtaining accurate student demand for future different delivery courses. The anecdotal evidence collected suggested that this was more challenging for apprenticeships and distance learning than gauging demand for more traditional courses.

Despite undertaking external market analyses and canvassing allied students, a number of institutions provided examples where either demand for places on different delivery courses had outstripped supply, or grown significantly year-on-year, or had not materialised as predicted. In one extreme example, the institution had worked closely with a number of employers for its apprenticeship degree and then none of their employees registered for the course. Conversely, another institution had a distance learning course which had tripled registrations over three years and far exceeded its initial expectations.

This appears to be an area where institutions need further experience to gauge the demand for these types of courses. The sharing of more accurate and timely data on student participation in different delivery courses across the sector may also support this work.

2. Tackling staff concerns

From both the survey and many case study visits, the review found that staff concerns resulting in potential pockets of resistance to change had not generally prevented developments to any significant degree. These concerns were less than expected. Some institutions found staff from certain disciplines more resistant than others, *'(some) staff are much more innovative and a bit more realistic about the real world and a bit more adaptable'*. However, institutions had experienced some staff challenge (on issues ranging from changes to established working patterns, time for research and student demand) and barriers arising from their schools or faculties working independently to each other and the administrative and support functions.

Institutions commonly described how their clear sense of purpose and strategy supported discussions with staff on the development of different delivery methods. Local geography and growing student numbers was another frequently cited reason used to support different delivery methods in discussions with staff, '*we regard ourselves as serving those (local) areas and that's an advantage to us working in partnership*'.

Finally institutions acknowledged the need to keep staff aware and fully informed of developments and with senior leadership support, staff became the biggest advocate for different delivery methods. Strong, authentic and sustained communication is therefore a key enabler to overcoming this issue.

3. Maximising a sense of belonging to the institution and unity among student groups

Institutions explained that they welcomed the new groups of students from different delivery methods and the opportunity this created. Students studying on these non-traditional delivery course within HE often had different characteristics, their socio-economic backgrounds, ages, work experiences and study ethics, compared to the traditional three-year undergraduate full-time student. They felt that these student experiences enriched the whole campus experience for all students, enhanced the reputation of staff and schools, which also better reflected the local community.

Creating a cohesive sense of belonging and opportunities to maximise these experiences however brought challenges. One or both groups of students could feel alienated by the other for example, by accelerated degrees being interpreted as priority degrees, or distance learners feeling second-class to students with more day-today contact with their tutors.

The use of technology, transparency of information and using the right language was important in tackling these issues. Information management and technology processes helped to create forums across student bodies, clear accessible views on timetabling, resource usage and event planning. One institution emphasised the importance it attached to using appropriate language with its students, that it was consistent, clear and did not contain bias to any one particular group. They also emphasised that these approaches required some investment of staff time and resources.

4. Keeping up the pace of change

Institutions were highly motivated about explaining that their developments complemented their institutional aims rather than diluting them. This energy (typically beginning with the leadership team) also appears prevalent and important in supporting the speed of transition. The review found that institutions were keen to harness momentum and use it to overcome staff concerns, '*we can show them (their staff) proof of concept which worked really well*'. Therefore institutions agreed that momentum was an essential factor in successful implementation of different delivery methods. Though not scientifically tested in this review, some were seeking an approach towards '*open innovation*' whereby momentum was established and maintained by staff creating and sharing different delivery method-related insights and solutions on a routine and systematic basis.

In developing this energy and momentum with their staff, institutions described experiences across a wide spectrum; from where developing the innovation was a corporate-led activity needing a mix of '*stick and carrot*', to where in a few notable examples, the staff ambition was moving at a pace that was challenging the administrative and support functions required to support it. Driving a manageable pace was a challenge that required careful management, judgement and oversight.

4.2.3. Other risks to institutions

One survey respondent identified that any Teaching Excellence Framework (TEF) impact arising from a different delivery method was a relatively minor factor. From our visits, others confirmed this, stating that the benefits of wider participation, student satisfaction, employment outcomes and meeting their charitable aims outweighed potential concerns on continuation rates.

In terms of assuring quality standards for other different delivery methods, institutions did not cite this as a major barrier. Whilst it was important to have a robust method and practice of teaching for these degrees, it was seen as important to the integrity of the institution more broadly that the approach followed was no less, or more, than other degree awarding processes at the institution. All institutions explained that their existing quality assurance processes were used to approve degrees by these alternative routes.

4.2.4. Apprenticeship challenges

From the survey the challenge from 'policy uncertainty' was selected by 71% of institutions with apprenticeship provision. During the visits, the factors of policy uncertainty and technical implementation were also cited as challenges specifically in developing apprenticeships. Institutions' main criticism appeared to be with the slow accreditation process. One institution responded in the survey stating:

> the '*standards approval process has been woefully poor and slow if not non-existent*'.

Several institutions spent time lobbying government as a result. In summary, the following challenges to the development of apprenticeships were identified:

- **Delays in the approval of Apprenticeship Standards** – The most significant challenge appeared to be the delay in the approval of apprenticeship standards and assessment plans through the process managed by the IfA. A third of respondents cited time to implement as a barrier and most institutions visited in the study cited the delay in approval as an impediment to meeting their planned ambition and their employers' expectations. By

January 2018, the IfA had 531 Apprenticeship Standards registered with a reference[14]. Of these, 223 (42% of the total) had their approval for delivery (following approval of their separate standard and assessment plan approvals). Of the registered standards, 308 were awaiting approval for delivery and of these 21 were level 7, three times the number currently approved. Of the 21 awaiting approval for delivery, 13 (62%) had neither the standard or assessment plan approved. This is an issue acknowledged by the IfA in its April document, 'Faster & Better' and it announces a number of process changes to help accelerate the programme[15].

- **Regulatory complexity** – One institution described the regulatory arrangements created across IfA, HEFCE, the Department for Education (through the Education and Skills Funding Agency for levy funded degrees), as burdensome and '*near to impossible'* to explain to stakeholders, whilst another found them '*massively confusing*', and '*so complex'*.

- **Developing employer understanding** – Linked to regulatory complexity, many institutions stated that employers did not commonly understand the apprenticeship process and that the initial interest in degree apprenticeships as a result had diminished. In response, a number of institutions had employed a member of staff to '*just go out and talk to employers about the apprenticeship levy and apprenticeships and what they can do with that'*.

- **Funding** – The funding process for apprenticeships was also cited by institutions as a challenge. Notably those institutions with a more mature approach cited it more as an obstacle or cashflow consideration rather than a barrier preventing course development. They understood the importance of establishing robust systems to ensure the timely and complete capture of information to support any external assessment that would lead to levy payments.

- **Mentor training** – Institutions reported that they had worked hard to train employer staff and mentor effectiveness needed to be a constant focus. For example, they collected feedback from students on their mentoring and established regular mechanisms to provide its positives and areas for development to employers.

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[14]   The latest data on apprenticeship standards and approvals can be found at
www.instituteforapprenticeships.org/apprenticeship-standards/
[15]   The Institute for Apprenticeships' April newsletter is available at
www.instituteforapprenticeships.org/media/1620/faster-and-better-magazine-master-pdf.pdf

Case study 2 – Have institutions experienced reputational damage when their apprenticeship students have lost their employing sponsor?

Institutions described a high level due diligence process to assess the strength of their firms' finances ahead of their involvement with the programme. Despite this however, two institutions described recent occasions where students enrolled on apprenticeship programmes found themselves out of work when their firms went out of business. As a result, one institution had tightened its due diligence processes.

Whilst not a legal obligation to find a replacement employer in the event of an apprentice being made redundant during the period of their study, institutions were keen to support their students and for them to continue their studies (thereby securing their future income). Both institutions reported that the majority of students affected found new jobs very quickly. Institutions cited their students' experience, commitment to study and motivation as key factors that helped secure other positions.

Though this evidence is anecdotal, institutions had not experienced significant difficulties in finding alternative employers should a student's employer go out of business. They indicated that their students demonstrated sufficient skills to find alternative employment and whilst due diligence over prospective employers was important to cover their going concern for the period, it was unlikely to address the risk entirely.

4.2.5. Distance learning challenges

From the survey the challenge from 'technical implementation' was selected by 64% of institutions with distance learning provision (25 in total). Institutions' main and time-consuming issue appeared to be with the process of translating existing course materials into a high quality online experience. From discussions the following issues were noted:

- **Time for implementation** – Institutions noted that it took a great of time to create the necessary learning experience and course content from existing materials. This needed to be carved out of the workplan for staff. However, institutions often found that this investment paid dividends to on-campus students. It commonly enabled on-campus students to access learning from teaching material online and have a more blended approach to their learning

- **Engaging third parties –** Institutions reported that they did not all have the skills or capacity to digitise course content themselves. Finding the right partner to develop, support or deliver online courses was a challenge. As an example, one institution explained that it had used a third party supplier to provide the platform for its distance learning material and course delivery. However, students had quickly seen gaps in provision and the quality between the institution and the third party supplier's presentation of course material.

  Some institutions described the process of engaging with third parties to develop distance learning materials and methods of teaching as a rewarding one. It opened up productive and challenging discussions on the student experience and monitoring and support more broadly.

4.2.6. Accelerated degree challenges

For those embarking upon accelerated degrees, two common challenges were identified.

- **Resistance to change in working practices** – The main issue reported was the shift in working practices and the impact on timetabling and research time. Moving from the traditional trimester model to a four-term year requires a different work pattern and did not commonly fit with how the institution plans its timetable and use of rooms and their maintenance. This different delivery method challenged many core customs or practices in institutions. Some with health schools identified that these issues had been overcome and furthermore that other advantages opened up, for example in supporting staff holidays outside the traditional periods.

- **Loss of some income** – Some institutions commented that increasing the use of assets for teaching across the year also meant a loss of conference income over the summer months and other approaches to manage estate maintenance were needed. However, they did not view these issues as insurmountable.

5. What benefits have different methods of delivery achieved?

This section explores the benefits and opportunities from developing different delivery methods. It draws on the findings from the survey and discussions with institutions.

A wide range of non-financial benefits were commonly reported by institutions that had an impact on their longer term approach to delivering education and building their reputation.

Further case studies illustrate institutions' experience.

5.1.   Introduction and survey results

The survey contained an open question on the benefits and changes arising from different delivery methods. An assessment of the responses was undertaken to aggregate into a summary. 30 of 35 institutions provided a range of benefits covering a number of different areas. The remainder indicated that either they did not know yet, had not realised benefits to date, or provided a negative view. In summary, a range of benefits were identified as shown in chart 5.

Chart 5: Frequency of reported benefits arising from different delivery methods
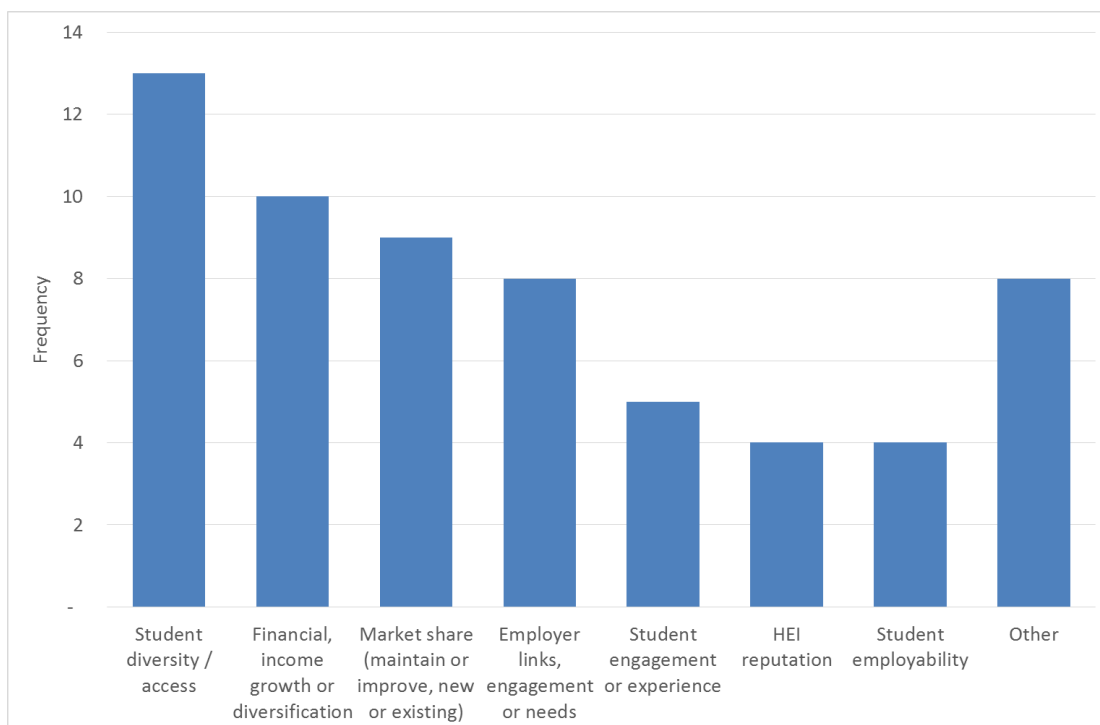
Source: Alternative provision survey September 2017

Included in 'Other' were a range of issues covering: critical contribution to mission; course experimentation and research-related, or variants of these.

5.2.   Common benefits

From discussions held, the review categorised six areas that appeared common to the three different delivery methods explored. In addition to the obvious outcome for students in how and when they access degree learning, it appears that developing these different delivery methods benefitted the institutions more broadly.

1. **Growth and reputation**

The visits identified that developing different delivery methods is an area of growing significance to the portfolio of many of the institutions visited. Many institutions visited quoted ambitious plans for student growth founded on different delivery methods and a growing track record. Their aims were to attract additional income, market share and status in the sector. From many of their websites, the growth and range of different delivery methods is prominent and clearly used as a marketing tool to sell the institution. This is often coupled with international reach from distance learning.

Case study 3 – how reputation at a distance learning course level can fuel growth

One institution found that their online creative writing course (albeit a masters) had tripled in three years. They identified that its success was in part due to the reputation of its course leader, a recognised individual in the field.

They also found that the leader had the skills and attributes on screen to make a disparate set of students from across the country and globe feel and act like one cohort. This was identified as a wider consideration for recruitment, selection and training of lecturing staff. In addition to the direct growth of this current different delivery method, the institution felt they had further insight to apply constructively to their approach for future different delivery method development.

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2. **A catalyst for innovation and new mind-set**

Staff working on different delivery methods have stimulated other staff to make changes to other areas of an institution's provision. This has included:

- Increasing the relevance of the existing curriculum by better tailoring it to student and/or industry needs;
- Developing new relationships with employers;
- Developing multi-disciplinary programmes;
- Tailoring assessment approaches, based on students' circumstances (for example work-based assignments for apprentices, or variable deadlines for distance learners).

Wider examples of the 'softer' impact included the development of a more tailored and student-centric approach to the language used in regular communications. Partly attributable to their mind-set for innovation, one institution commented that they had also made a number of commercial appointments to senior positions.

Case study 4 – Taking a more student-centric approach

One institution reported that they had transformed their Student Applicant Services from being its Student Admissions. The greater acknowledgement and prominence of the function being about a service to students and the re-engineering of the admissions process itself for prospective undergraduate and postgraduate students had a positive impact.

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3. Constructive challenge to existing systems and processes

Different delivery methods have challenged institutions' status quo and how institutions work across a wide range of areas. One response to the survey typified the experience of others:

'*exploring alternative methods of provision provides opportunities to revisit curriculum* [and] *challenges staff to think about delivery styles in new and innovative ways*.'

Institutions cited how different delivery methods have led to changes to a variety of processes, for example:

- Expediting decision making to respond to markets and opportunities;
- Supporting more flexible timetabling; and
- Developing metrics that track student progress and support.

The planned impact did not necessarily feature as part of the initial investment cases described by institutions in approving funds or actions to develop different delivery methods. Many institutions cited areas where they needed a change in their corporate approach or further investment to better systemise and support the growth of different delivery methods. For example, contracting skills were often needed in the development of apprenticeships and distance learning courses. Information management and technology was identified as likely to aid efficiencies when provision was at a larger scale of activity. Several institutions described a tipping point of scale being reached between 'faculty' approaches to developing different delivery methods towards a more centralised one.

4. Organisational structure to aid management oversight of new modes of delivery

Of the institutions visited only one had created an entirely separate corporate entity as a wholly owned subsidiary of the institution. This was not established in response to the developing alternative provision but has since taken an umbrella role for the remote campuses and online provision that the institution has established and is the business vehicle for its innovation in education.

Most described delivery arrangements that were contained within existing school or faculty structures. They explained this approach in terms of the scale of the current provision being a relatively small proportion of their overall portfolio. These were often supported by a small central administrative resource with leadership at the board level, commonly as part of a post with a wider portfolio of responsibilities, for example PVC for Student Experience, or similar.

Some outlined discussions that were ongoing on how best to organise different delivery methods across the existing faculty structures and the extent of resources needed in support. There was a common tension explained between giving faculties licence to explore alternative approaches and innovate, versus a more centralised approach providing a more consistent and common institution experience to the provision. Institutions were keen to take a consistent 'product' across their portfolio of provision to market (beyond their normal accreditation and quality assurance procedures). However, many felt that it was important to the process of change and winning hearts and minds of academic staff that they were given the opportunity to drive the initial exploration and change.

5. Student experience

Institutions quoted many positive changes impacting on the student experience from different delivery methods. These included:

- **Widening access and participation** – Making HE possible for students who had not typically accessed degree-level learning, for example older learners or those with financial or family responsibilities.
- **Positive feedback from students** – From surveys and workshops conducted by institutions, students appreciated many aspects from their ease of access to materials to turnaround and quality of support. A number indicated satisfaction rates higher than their on-campus students.
- **Variety in student interactions** – Institutions had planned more variety in their student interactions than with traditional students. For example, some on-campus events were held for distance learners in addition to the web-based groups established and information sharing platforms. Similarly for apprenticeship students, in addition to mentoring contact with employer staff and the student, and between institution and the mentor, institutions also created on-campus opportunities for mixed interactions among all the employers and students.

6. Stakeholder relations

Different delivery methods have furthered institutions' links with industry. Institutions are clearly working hard with a range of partners to deliver different delivery methods: from further education (FE) colleges (for apprenticeships); business (ranging from large to small and medium-sized enterprises for apprenticeships); to business start-ups (for some distance learning); professional registration bodies (for condensed degrees and distance learning) such as those for nursing, engineering, law and medicine; government departments; other HE providers; and international educational bodies (for distance learning).

Case study 5 – what kind of individual undertakes an apprenticeship? And what impact does it have for the institution?

Several institutions found that their students were either mature existing employees or straight from school. One institution reported that a significant proportion of their apprenticeship population were typically mature students already in the workplace and some had previous experience of post 16 education. For example one student had previously attempted a degree but it had not worked out and they had ended up working in a national chain of fast food restaurants. After several promotions and a management role, they joined the apprenticeship programme and cited their family commitments as a key driver for obtaining a degree to progress their career. The institution indicated that they had a number of other students with similar restaurant chain backgrounds.

The institution described their students from school as having a '*whole range of motivations*'. Some were more financially aware than their peers. Some wanted to take advantage of paid work, others wanted to avoid financial hardship or found that they wanted to avoid adding to existing family debt.

Some were attracted to pioneering institutions and some were more risk-adverse saying that they had siblings who had completed degrees but not found work.

The institution also found that apprenticeship students '*are quite challenging*'. They set high expectations and are not afraid to stretch themselves, institution staff and fellow students. This was occasionally described by institutions as a positive experience, '*once the lecturers got chased they were thinking "Gosh this is great because people keep coming back and bringing so much to the learning."*'

5.3.   Benefits from apprenticeships

Degree apprenticeships currently have 30-40% females and though early days, anecdotal evidence is beginning to be collected that indicates the number of females entering science, technology, engineering and mathematics (STEM) occupations (principally digital and technology) from degree apprenticeships is higher than traditional methods of delivery. The emerging explanation for this shift is that because employers choose the apprentice there is more latitude over the entry qualifications. For example, one theory being investigated is that women entering the digital and technology solution degree apprenticeship do not necessarily have an A-level in mathematics or in computing but have gained significant experience through their employer.

HEFCE also cited that the emerging data indicates that people who would not ordinarily go to university are entering higher education through degree apprenticeships. This experience reflects this review's discussions on apprenticeships with institution. Although it is early days and the numbers are small in comparison to the overall volume of students in higher education, this is a positive outcome to date.

Institutions commented that they received positive student feedback from their current cohorts. They felt this was partly due to the access to higher learning not previously available to the student, but also the increased level of support available to them from their employers and institution staff.

A few institutions cited apprenticeships as an opportunity to:

- **Learn how to improve any intensive teaching period** – drawing on undergraduate degree apprenticeship experiences and their intensive study days and how you deliver effective learning to students throughout the day;
- **Engage with students from more diverse backgrounds** – though some institutions felt there was a potential future demand coming from more traditional and financially aware sources eager to '*earn and learn'*; and
- **Prioritise the development of students in a more employer-focussed way** – one institution pursued this provision in order to address the fact that, '*employers are very keen on the technical knowledge but they are also very keen on people who can work in a team, negotiate and present'*, '*we are developing skills and behaviours that is something that employers are very keen on*'.
- **Develop their reputation** – Several institutions reported working with global companies to develop their apprenticeship programmes and they felt this further enhanced their own reputation and attractiveness to students as a place of study and opportunity.

5.4.   Benefits from distance learning

The most noticeable differences in impact for distance learning were examples where students joined courses outside of the traditional registration periods. In one case an entirely modular approach had been adopted whereby students could (largely) pick and choose the order and pace of modules contributing to their degree award.

Institutions with distance learning provision also quoted good satisfaction rates among their students. One cited where students scored a higher satisfaction rate than their traditional counterparts. Several institutions cited that more tailored and personalised materials and interactions with students allowed them to more precisely understand and frequently monitor students' progress.

First mover advantage was a reason cited for investing in distance learning courses. Anecdotally, these courses could take time to make a return on investment if not an immediate success. One institution described a course that was not currently financially sustainable but they had decided to extend its provision beyond the normal threshold, to allow it more time to become successful. The scalability and ongoing costs, once its initial setup was complete, made this decision easier than on campus courses.

6. What makes different methods of UG delivery successful?

This section brings together the observations and experiences of the institutions that have contributed to the review. Details are provided on how institutions have achieved success from the development of different delivery methods and it provides helpful pointers and opportunities for institutions seeking to develop, grow or refine their approach to different delivery methods.

There were many actions and approaches that institutions identified as key to successful progress but also a few areas where external support was highlighted as helpful to the development of future different delivery methods at pace.

6.1. Overview

Whilst the extent of different delivery methods in the sector is still small compared to current undergraduate student provision, we learnt from our discussions with institutions that it is:

- Still thought of as '*early days*' even though some provision is actually quite mature. For example one very successful distance learning course had been running for '*many, many years*';

- Likely to be on the cusp of significant change and growth. Many institutions reported to us significant growth plans for the development of degree apprenticeships and many also have ambitious targets for growing student numbers via distance learning; and

- Already significant in scale and strategic importance for a number of institutions.

Detailed below are the common and stand-out approaches taken by institutions covered by this study that were cited as important to its success. We also include some observations identified for policy makers. In Appendix 1 the review sets out further considerations that institutions, engaged in this work, undertook. It contains a number of approaches identified during the course of this work that others may find useful to navigate the issues raised.

6.2. Key steps to enable success for institutions

6.2.1. Important factors to date

From the survey and discussions with institutions, the review identified and explored a number of themes that appeared important in developing different delivery methods:

1. Deliver a clear vision with visible, passionate leadership

'There are no quick wins – all the initiatives have their own costs and there's no point in doing something half-heartedly.'

We commented earlier how important institutions found a clear sense of purpose and strategy for successful different delivery method development. It supported discussions with staff on the development of the different delivery method and helped build momentum. This strategic clarity was coupled with a clear approach to taking risk and decision-making from the Governing Body.

Institutions also described the power of charismatic and visible leadership in the delivery of the strategy and towards achieving strong staff engagement. VC leadership was described as crucial and

the enabler from which PVCs and heads of department could enforce and grow. Pockets of staff resistance were experienced, but could be dealt with in a direct and positive manner, providing the leadership and strategy were understood.

We did not get a sense that institutions were necessarily creating a burning platform in their strategic narrative, more a vision for the future focussed on growing their reputation, influence and student body. However, some institutions also described more explicitly their bold vision in discussions with staff on the need to diversify income and to innovate to maintain sustainability.

Passionate leadership also extended to course delivery and was cited as a key factor in the success of one institution's distance learning course. The leader of the course was described as having a magnetic personality able to transcend the virtual environment and create a community amongst its disparate student population.

2. Take a long term-view

Institutions admitted to not being able to predict easily growth levels or when it might happen. Some course registrations far exceeded initial expectations (a case of the right course at the right time), others took longer than expected to take-off.

Several institutions spoke of extending their evaluation period for certain different delivery methods longer than had been first envisaged. This seemed to suggest that a long-term view was needed providing it was within the risk appetite of the institutions. As with the survey, institutions discussed creating business plans over the longer-term with key measurable targets and investment.

3. Communicate clearly on the future work, purpose and progress

Many institutions described many proactive methods they had deployed to help their staff understand the future plans and '*get with the programme*'. These ranged from large-scale formal faculty meetings with staff, to ones with heads across faculties to more one-to-one informal discussions. They felt their detailed plans and communication was a fundamental building block for the success of developing different delivery methods. They said it created a sense of control and achievement over time.

Though not a factor from the survey, institutions commonly cited the speed of implementation of a different delivery method as a key factor for success, alongside strategic clarity.

4. Play to the institution's strengths, but do not be constrained by the traditional model and build provision which has cultural fit

Some institutions described instances of growth of a different delivery method where they felt that they had first mover advantage, notably, but not exclusively in distance learning. Here they had taken, or planned to take, advantage of their reputation and use that as the platform for their delivery programme.

Institutions also described the development of different delivery methods where they had existing portfolio and strengths. They tended to build different delivery methods on existing foundations rather than trying anything too far from their known strengths. This also made the transition seem

less pioneering and institutions felt it would ease any new different delivery method into mainstream delivery. Moving at a pace and in a space that has strategic fit with the institution seemed to work well, providing it works commercially.

This finding also raises interesting questions and challenges for the ability of institutions to diversify into new portfolios. Is strategic and cultural fit a pre-requisite for different delivery methods' success? Many of the institutions were actively seeking to identify the factors that made their courses successful and seek to replicate more broadly.

5. **Ensure the board's appetite to risk is clear and that it holds management to account on the business plan**

Institutions reported that understanding the detailed risks that the institution was exposed to was not always clear from the start, but it has become increasingly clear and important. Considering together the risks across different delivery methods and other traditional programmes and opportunities was considered positive and an understanding that demand predictions could be wrong occasionally.

Accountability is also key. Whilst many institutions described little significant change to their governance and structure, it was clear where the responsibility and expectations lay among staff in the institution. Institutions recognised that different delivery methods were a test of good governance and may benefit from a light touch approach when an emerging and organic activity. Overly tight controls could stifle the opportunity, but too little control could expose the institution to inappropriate levels of risk. Anecdotally institutions appear to apply more control once demands from faculties for administrative and support functions became more significant.

6. **Develop partnerships that are culturally aligned and commercially sound**

A cultural match with partners was outlined as very important, not necessarily size but the partners' vision, values and approach. This was summed up by one institution in launching their new accelerated degree course last September with a partner:

> '*really easy to do (with them) because of that strategic congruence, we liked their company, the cultural fit*'.

Several institutions described failed partnerships because their culture was too different and institution 'fit' was felt to be the defining factor for their success with one venture where they had previously failed with another.

Several institutions admitted that there was not necessarily a systematic due diligence process, with a checklist for compliance. Strategic fit was clearly one the most important factors in determining effective partnerships but no-one had a 'go-to' list of characteristics for use in assessing prospective parties. Institutions did not feel uncomfortable with this approach.

The review found a varying degree of formality to partnership working from none, to individual memorandums of understanding, to formal legal contracts. Institutions generally felt able to work within the parameters set by whichever formality was in place.

7. Invest in teaching, quality materials and technology extensively

Institutions outlined their use of technology to support different delivery methods, commonly on student monitoring systems and virtual learning platforms for distance learners. Given the challenges involved this appears crucial to the sustainability and credibility of the courses developed. Time therefore was needed to be found from within work allocations to allow staff to develop and implement these developments and produce quality content that also produced a rich learning experience.

8. Share success

'*The stuff we are learning by going off-campus is informing what we do on (campus) and vice-versa'*.

The sharing of a different delivery method's success across faculties or departments seems to be a common tactic to help build acceptance and engagement with different delivery methods. Growth in student numbers was a key measure of success used in these approaches as was student feedback on their experiences.

9. Undertake market analysis but do not expect to get it right every time

Institutions highlighted the limitations that exist in market analysis to determine course demand. Apprenticeships were deemed less difficult to estimate, but even there several examples were given where numbers had fallen short. Equally, institutions quoted over-subscription rates for some courses for 2018. Despite these limitations institutions undertook these exercises and indicated that there were important in the first instance, to help set ambitions, and also because they helped develop a better understanding of the market, also applicable to other courses, over time.

Institutions also used broad UK-based approaches to inform annual pricing of courses. Anecdotally this approach also considered a range of further factors.

6.2.2. The role of business cases in supporting decision-making

The role of business cases is an area identified by many institutions in our survey as an area for future focus. Whilst many institutions described fairly loose decisions taken at the start of their recent different delivery method development and light business cases or plans to support these actions, they also recognised that as scale increased and investment became more significant, that fuller business cases would be needed.

At the outset of their development some projections were made and resources committed but these appeared relatively small scale and did not necessarily account for the opportunity cost involved in developing certain aspects, for example the staff input into developing online materials or developing employer relations.

Some institutions described their provision as loss leaders. Institutions said that their business cases were scrutinised in detail by their boards but their priority was not always about the finances. One said that '*it is not all about student number(s) and profit, some of it is about community building*' and '*to be fair the board is saying to us we never said you had to make a surplus in three years*'. As

numbers grow and this form of provision becomes more 'main-stream', the need for a positive financial return will increase.

Business cases, or annual plans were generally produced by institutions to support the further development of different delivery methods and the decision-making processes as the provision grew. These tended to be taken to the institution's governing body, according to delegated limits. Whilst the content was obviously different in nature, they followed existing formats and decision-making approaches. From the descriptions provided, the business cases:

- Typically focussed on a range of high level qualitative factors such as cultural or strategic fit, school/faculty funding issues (its timing and scale), course pedagogy and resourcing;

- Contained differing levels of financial and non-financial detail. More than half the institutions described content that did not appear to contain detailed financial plans with longer-term projections, or specify a range of key outcome or quality measures. For example only one institution described a 15-year planning horizon with detailed finances and operational metrics, others had business plans that covered year one in detail and years two and three more broadly. The scale of the investment in the more detailed planning example appeared to be important factors; and

- Tended to be broader in scope and more quantitative where different delivery methods had already been developed.

Investment plans also ranged in scale from a few tens of thousands of pounds to millions. Some institutions described aspects of their development that had been at zero cost. Through some provider partnerships for online development options, one institution had sought to minimise initial investment costs and placed the burden of setup with the partner provider. This approach avoided some significant upfront cash commitments, though not all. Institution lecturing staff typically became involved in helping to develop existing course material and institutions reported that this opportunity cost did not appear as transparent as perhaps it could have from the start.

In most cases, the initial resourcing to support different delivery methods appears to be sourced from existing resources. A notable exception was apprenticeships where a few institutions had sought to gain apprenticeship knowledge and experience from the Further Education sector. Here, institutions felt staff with existing apprenticeship management experience helped navigate the complexity of this area.

Further resourcing commonly took the form of some additional corporate posts to help work with employers and heads of schools, tackle some of the administration, research and communications plus develop business plans. As the provision scaled up, institutions described arrangements to pool more resources and also described the importance of having IT systems in support for course delivery.

6.2.3.   Three common areas of future focus

The survey asked open questions on the key lessons for similar or future different delivery methods. A wide variety of positive examples and reflections were identified. Together with the feedback from the case study visits, three common areas of focus were identified:

a) **Business cases** – the development of accurate and complete business cases was acknowledged as an area for further development by a number of institutions, but only once a concept and demand had been proven. Typically a rounded business case will include; costings, income and return projections, a balance of expected benefits, and greater transparency over risks, complex delivery models and appropriate resource levels. Its scope should also extend into a better understanding of the potential impact of transferring teaching methods to standard provision and assessment over the likely lead in time. This greater level of precision and detail appeared to match the maturity of the different delivery method and its understanding and development. This may not be the case, or warranted (given the experience of others) for all institutions.

b) **Market analysis** – institutions indicated that success was market driven and that higher quality market research activities were required to better estimate likely cohort sizes, taking into account existing private and public provision. It was however acknowledged that market analysis does not guarantee recruitment.

c) **Enthusiastic employers and industry partners** – these were essential to identify and work with effectively. Institutions cited both those businesses involved in apprenticeships and in helping to develop systems in support of a different delivery method, for example in creating virtual learning environments or systems of monitoring. The State of the Relationship Report 2017[16], the flagship publication from the National Centre for Universities and Business, published in May 2017, states that strong examples of institution-business partnerships exist but that these could be further strengthened in the areas of degree apprenticeships and cross-disciplinary problem solving. They cite developing two-way and long-term relationships with employers as key.

Appendix 1 sets out a more detailed series of actions and questions that institutions may wish to reference in developing its different delivery method. These are drawn from the case study visits and also from the survey.

6.3.   Opportunities for policy makers to further support the diversification of delivery methods

To complement their own efforts, institutions reported that it would be beneficial to received further external support in the following areas:

- **Speed of apprenticeship approval** – This was the most common challenge from the survey and elicited many frustrated responses during the case study visits. Institutions commented that the IfA website was an improvement, and that the approval process needed to accelerate significantly to match employer demands and that greater transparency was needed to help understand and support the process and funding flows. Institutions also commented that they were lobbying policy leaders and government officials to achieve this aim.
- **Perception of accelerated degree quality** – Institutions found that potential students perceived these degrees as less worthy, interpreting 'accelerated' as '*less'* rather than the same rigour and study in a shorter overall time period. A few institutions commented that

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[16]   www.ncub.co.uk/reports/state-of-the-relationship-2018

whilst they could influence the market's understanding of accelerated degrees, they could not achieve the desired impact beyond their local boundaries.

Several institutions agreed that the key markets for condensed degrees were students already in employment or with other commitments on their time and were seeking a means-to-an-end in the shortest possible time, for example promotion or regulatory compliance for a job, or were financially constrained and therefore attracted to the economic benefits or earning earlier and potentially paying for less living expenses over the period. Given the common time-constrained characteristics and access to these populations, institutions felt they needed government and employer support to help promote the benefits of accelerated degrees and dispel any quality myths. One institution felt the need started with schools' career advice and then continued through to employers.

- **More consistent terminology and data collection** – From our research and desktop evaluation of data, further progress can be made to more easily identify, classify and assess different delivery methods. For example, the current the Higher Education Students Early Statistics (HESES) data collection exercise has no standard identification for the number and range of institutions offering accelerated, compressed or fast-track degrees. It will be necessary to agree some common types of different delivery method to inform any data collection. There is a diversity of provision that already exists, but it will be important to future funding considerations and institutions' own assessment of the market that a clearer, more detailed picture of provision exists.

7. Glossary

BIS	Department for Business Innovation and Skills
CMDA	Chartered Managers Degree Apprenticeship
EFSA	Education and Skills Funding Agency
FE	Further Education
FSSG	Financial Sustainability Strategy Group
FTE	Full-Time equivalent
HE	Higher Education
HEFCE	Higher Education Funding Council for England
HESA	Higher Education Statistics Agency
HESES	Higher Education Students Early Statistics
IfA	Institute for Apprenticeships
IT	Information Technology
MOOC	Massive open online course
NCT	National Childbirth Trust
PESTLE	Political, Economic, Social, Technological, Legal and Environmental
PG	Postgraduate
PGCHE	Postgraduate Certificate in Higher Education
PVC	Pro Vice-Chancellor
STEM	Science, Technology, Engineering and Mathematics
SWOT	Strengths, Weaknesses, Opportunities and Threats
TDG	TRAC Development Group
TEF	Teaching Excellence Framework
TNE	Transnational Education
TRAC	Transparent Approach to Costing
UG	Undergraduate
VC	Vice-Chancellor

8. Appendices

Appendix 1 – Practice examples and considerations from case studies

In summary, the review found a number of key learning points and approaches that may help other institutions assess and develop future different delivery methods. The table below sets out a number of key questions and considerations that institutions, engaged in this work, undertook. The table also contains a number of approaches identified during the course of this work that others may find useful to navigate the issues raised. This is not meant as an exhaustive list of factors and solutions, and an institution's own circumstances need to be factored into local considerations.

Table 1 – Case study learning points and approaches

Area	Executive questions and further considerations for *Programme leads (highlighted in italics)*	Factors and approaches to consider
Building and presenting the case for change	What is the case for change? Does the proposed different delivery method fit with the culture and mission of your institution? How clear is your rationale for the different delivery method? What is the strength of rationale for the different delivery method? Are the stronger reasons for the different delivery method sufficient for the long-term? What does success look like? Is it compelling? *Are you excited by the prospect of different delivery method?* *Can the purpose and rationale be easily expressed and understood and communicated to teams?* *Does the executive evidence the necessary support and visibility to a different delivery method?* *Is success articulated in clear measures for your provision?*	Finance may be an underlying factor for the different delivery method expressed in terms of market share or income diversity but the case needs to support in equal, or greater measure, the culture and mission of the institution. Is the different delivery method a logical extension to existing provision? Are there existing signs that students from different socio-economic backgrounds, ages, work experiences and study ethics already find the institution attractive for study? How closely do you already work with employers? Can they be sounded out early on the vision and rationale? These factors can all contribute to the case. A sustained and visible presentation by senior leaders of the different delivery method development is needed across the institution to embed the case for change. VCs commonly took the lead in a number of institutions that engaged in this study.
Assessing the team's capability and capacity	*Is our leadership team up for the challenge and opportunity?*	Consider the energy, resilience and leadership skills of the team.

	Does our leadership team have the required capacity and capability to make this a success? *Are the existing mechanisms of communication sufficient to ensure feedback and support is provided on a timely basis?* *Do you have access to the range of skills outside your experience?*	Commercial skills are likely to be needed (in partnering with industry and third parties), where gaps in exist, how will they be addressed? Have all relevant staff the necessary skills and experience to work with students with a different set of characteristics? Does your team have sufficient expertise in apprenticeship regulation or distance learning development?
Assessing student demand	How have you gauged student demand? Does your approach to assessing demand match the maturity of your different delivery method at the institution? What is the plan if demand is short? What are the plans if demand exceeds capacity? *Are the assumptions on demand clear?* *Is the baseline demand level necessary for sustainable financing clear?* *Does the future growth recognise competition and downside risks (for example drop-out rates, and poorer than expected student experience and outcomes)?*	Use a mix of sources for assessing future demand. Though not an exact science, a variety of sources were quoted by participating institutions, from past and present students, employers, competition research (local and national depending on the different delivery method and ambition), to schools and FE colleges. Institutions need to present the proposed course in balanced terms to minimise any potential bias, for example in presenting the potential financial benefits of a condensed course. Assessments of student demand from academics need to be evidenced. Whilst the limited evidence on drop-out rates indicated no significant deviation from traditional provision, small cohorts were more sensitive to changes and should be accounted for in demand predictions.
Achieving effective staff engagement	What is your staff engagement strategy for the different delivery method? How will you deal with each area of staff concern? *How will you ensure staff are appropriately supported with the range of needs and challenges that a different cohort of students may bring?* *How will you ensure consistent staff practices across schools or departments?*	Recognise that staff may bring positive or negative bias to any discussion on the different delivery method, for example exaggerating the positives of growing academic reputation or negatives of working with industry. Be prepared to employ staff who can match the new demands from the different delivery method, for example to work over the summer or bring credible industry experience to bear. Set realistic expectations with staff over the range of needs and challenges that students may have. Set out how the institution will support academics with these challenges.

		Make sure staff have a clear understanding on respective roles and responsibilities for student support from the centre versus school or department.
		Ensure staff have adequate time allocated to invest in new systems and practices.
		Use successes and 'champions' to further any different delivery method's impact across the institution and win hearts and minds.
Maximising the student opportunity	How will the different delivery method students change the institution?	Be prepared to learn from a new cohort of students (and from apprenticeships what industry may bring).
	How will they be inducted into the institution?	Make sure others are equally prepared.
	How will we maximise the impact of different delivery method students on our reputation?	Create platforms that bridge different cohort. Consider mixed learning interactions, for example occasional online lectures for traditional students and apprenticeship students in traditional lectures.
	How will we maximise students' interactions between the non-traditional method and other traditional students within the school or department?	Develop student support systems that meet the background of your students.
Creating robust financial plans and business cases	Do we have sufficient detail in our financial plans and business cases?	Use existing approaches to developing business cases and plans – remember that the different delivery method should fit the culture and mission of the institution.
	Do the plans fall within our risk appetite?	Gain early Governing Body feedback and approval of the parameters in which you plan to operate within.
	Does the balance of financial to non-financial analysis and assessment match the risk and opportunity for the period?	Depending on scale and local considerations, a balance of market rationale and local logistics should be set out. The business cases and plans should cover a range of factors such as:
	What are the key assumptions and do they appear robust?	
	How has the Governing Body been engaged in assessing and approving the different delivery method plans?	• Cultural or strategic fit – some used a strengths, weaknesses, opportunity and threats (SWOT) analysis to fulfil this;
	What is the evidence that the lead times are reasonable?	• A market assessment (either extending the SWOT and / or using a political, economic, social, technological, legal and environmental (PESTLE) approach);
	What significant additional resources are required, and when?	
	Is the appetite for risk that I'm working to clear?	

	Do the plans take account of any loss of income more broadly, for example from using assets all-year round for teaching?	• Financial and non-financial detail on resourcing and priority investments for the department and / or centre; • Longer-term demand and financial projections (with worst case and optimistic scenarios); these may be broader in nature than the shorter term projections; • A range of key outcome or quality measures; • A balance of expected benefits; • A risk assessment that includes any key interdependencies? • Any partnership working and where relevant the maturity of that relationship, risks and reward; • Course pedagogy; and • An outline plan of actions. Institutions may wish to raise the level of precision and detail as their understanding and development of the different delivery method grows.
Apprenticeships	*Are there any quick wins?* *How will employers' expectations be managed?* *Do we have sufficient capacity and capability to engage with employers, FE colleges and schools on a sustainable basis?* *Do our financial plans take sufficient account of the funding for apprenticeships and its timing?* *Have we the requisite knowledge and experience to navigate regulatory requirements?*	Use existing approved standards where possible to deliver courses in a timely fashion. Work with local employers for the local community to produce local graduates. Be rigorous in selecting employers who share the same ethos towards developing staff. Do not underestimate the time needed to engage with businesses. Support employers in developing the degrees they want, put them and the student front of stage. Consider supplementing your management with FE experience.
Condensed courses	*Are we clear on the rationale for introducing condensed courses?* *Are the teaching staff ready, willing and able?* *Will students be sufficiently supported?*	Focus on the quality of the course and the student demands it meets. Deploy motivated staff ready for the challenge. They may not have a traditional research focus.

	Anecdotally, condensed courses can attract highly motivated students, are we prepared?	Ensure appropriate, proactive, systematic pastoral care is available throughout the course length.
		Communicate and educate target markets, for example, schools.
Distance learning	*For distance learning, have we adequately resourced the development of our course material for this different delivery method?*	When seeking to work with partners, undertake due diligence that is appropriate to your institution. This should contain a blend of cultural and financial assessment.
	Do we have the right level of control in any arrangements with third party platform providers?	Seek to use technology innovatively to create an immersive learning experience. Build a comprehensive approach to student monitoring. Share learning with traditional courses.
	Where are the synergies for on-campus students arising from developing distance learning materials?	Broaden access points where possible.
	Are the accountabilities for managing this relationship clear?	Ensure the timetable has sufficient scope to meet student demands.
	Do we have the technological platform to deliver the provision how we want?	MOOCs can create interest and tasters but should give too much, or too little away. They can be useful marketing tools.
		Be creative in how the different delivery method works. For example do not limit student interactions because of distance – think about creating local connections where feasible.

Appendix 2 – Terms of reference for the review

This is a collaborative project with the sector: led by the Support Unit, but with widespread consultation from an Oversight Group of institutions that have experience of different delivery methods.

TDG and FSSG agreed that the intended benefit for institutions is that there will be a source of reference that can help them in pursuing alternative delivery models and avoid the issues that are commonly faced. Agreed at the June 2017 meeting, and reflected upon in order to guide the stages of the project, were the following key elements of the terms of reference for this project:

- Agree the types and levels of provision that are in the scope of this project. At this scoping stage it is assumed that this will include condensed degrees, sandwich courses, part time, higher apprenticeships, distance learning for undergraduate studies;
- From Funding Councils, other knowledge and HESA data, identify institutions that have mainstreamed provision through different delivery models;
- Based on this initial research, agree with the oversight group the scope and scale for the remainder of the project;
- Perform desk based research and analysis of studies that have appraised the cost of different delivery methods;
- Select institutions to visit in order to develop case studies of the different delivery methods used, and the costs and resource that these consume. During the visits an understanding will be built of how the different methods of delivery compare with standard three year undergraduate delivery. Any unique factors that are either a result of the subject or type of institution will be identified and articulated;
- Expand the case studies above to include estimated cost of delivery to illustrate the different components of cost, (the selection of case studies will consider the subject mix and type of institutions); and
- From the institutional visits, develop some quick reference / good practice material for institutions to consider in developing different delivery methods, such that the cost and impact on financial sustainability is identified at an early stage.

Appendix 3 – Membership of the Oversight Group

Member of the Oversight Group were:

- Sarah Randall-Paley (Chair), Director of Finance, Lancaster University
- Lynda Brady, Pro Vice-Chancellor (Student Experience) & University Secretary, Edge Hill University
- John Cunningham, Director of Finance, Manchester Metropolitan University (until December 2017)
- Clive Fletcher, Principal Accountant, University of Worcester
- Professor Neville Ford, Pro Vice-Chancellor Academic, University of Chester
- Professor John Grattan, Pro Vice-Chancellor, Student Experience and International, Aberystwyth University
- Dr Samuel Grogan, Pro Vice-Chancellor Student Experience, University of Salford
- Professor Helen Higson, Provost, Aston University
- Professor Jane Saffell, Deputy Principal, Education, St George's, University of London
- Heather Williams, Finance Consultant, Office for Students
- Andrew Bush, Director, KPMG
- David Sharif, Senior Manager, KPMG

Appendix 4 – Case study participants and their alternative provision

The review is grateful to each of the following institutions for their participation in the case study visits.

1. Coventry University
2. Falmouth University
3. Glyndwr Wrexham University
4. Manchester Metropolitan University
5. Teesside University
6. University of Derby
7. University of Dundee
8. University of Worcester

Each institution has provided a brief synopsis of its position and current different provision.

1. Coventry University

Coventry University is proud of the diversity of its 34,000 student population across campuses in Coventry, Scarborough and London. Their students and staff come from around 150 countries around the world and from all socio-economic backgrounds. The unifying feature of education at Coventry University is an enquiry led curriculum that brings together the best of abstract and theoretical knowledge and real life industry, commerce and third sector problem solving. A determined focus on the quality of the student experience and great outcomes leading to positive destinations are the reasons that Coventry secured a TEF gold rating in 2017.

Coventry University established a London campus in 2010 bringing the Coventry experience to students who wanted to learn in the heart of City. The curriculum places great importance on real experience for all students alongside classroom learning. In 2012 Coventry opened Coventry University College, now known as CU Coventry, CU Scarborough and CU London. This flexible learning model is designed around the learner, giving them the flexibility to step in and out of learning as life changes and at a price that is considerably lower than the majority of the sector. This provision originally targeted a commuting student population but has proven popular with many types of student, not insignificantly the 'return to learn', mature students.

The creation of Coventry University Online, in partnership with FutureLearn, is bringing a new model of accessible learning to students who are unable, or do not wish, to study on campus. The project is also about recognising that students who study on campus are also very connected and that elements of online content add value and richness to all learners. Online and on campus are becoming modes of access and will ultimately merge.

Coventry University is very engaged with the Degree Apprenticeship movement, having established many partnerships with employers. Under the banner of the Nationwide University, Coventry are ensuring that great quality learning is reaching into the workplace.

Coventry is committed to innovating in order to provide high quality education in ways that reach the student and recognise that their lives are varied and complex. This culture is helping to ensure that access to higher education is truly available to those who can benefit, that the conditions are such that anyone can succeed to the best of their potential, and that everyone can aspire to graduate outcomes wherever they may be.

2. Falmouth University

Whilst Falmouth University does not have any Degree Apprenticeship provision at present, it envisages that it will account for 5-10% of their portfolio by 2022/23. Whilst very few of the current Degree Apprenticeship standards are linked to the Creative Industries, it has had feedback from industry, partners and students to suggest that this mode will work well in certain subjects, for example Fashion Retail, Computing, Hospitality and Leadership, and they are currently exploring this with industry partners.

Falmouth University has been delivering accelerated degrees with partners since 2014 and in 2017. In anticipation of changes to funding regulations and student demand, Falmouth launched its first seven on-campus accelerated degrees for a 2018 start. Further expansion of the accelerated portfolio is being explored and is likely to grow alongside student awareness and demand. Sandwich years will be an additional option – providing a year in industry alongside an accelerated degree to create an enhanced 3-year offer.

In 2016 Falmouth University launched its first suite of Falmouth Flexible (Distance Learning) courses in partnership with CEG Digital. The initial five courses attracted 50% of Falmouth's 2017 post graduate applications and enrolments. A further four courses are launching within the next 12 months, including the first undergraduate course and a PGCHE. It is projected that by 2030 the number of courses offered will have quadrupled and will reflect the breadth of Falmouth University's on-campus portfolio.

3. Wrexham Glyndwr University

Wrexham Glyndwr University is a medium size university with campuses in Wrexham, Northop and London. It is entering an exciting new phase in its history and is driving academic excellence through a wide range of innovative and industry-relevant courses. The region is a growing economic hub, bursting with ingenuity, creativity and ambition and it aims to be a major part of its growth as we work with industry and government.

Whilst Wrexham Glyndwr University is one of the newest universities in the country, established just in 2008, its history goes back to its founding college in 1887 when it was known as the Wrexham School of Science and Art. A quarter of its graduates come from what are known as low participation neighbourhoods, people who never thought they could go to university.

Wrexham Glyndwr is building online course material across a number of curriculum areas and expects to see significant growth in this area from its existing 121 students. We will continue to explore the fast-track awards market with caution, this has not had much traction to date. The Welsh system has debarred universities from running apprenticeships – this has been restricted to further education colleges and private providers, and though that is just about to change, the system is far behind that in England. An added complexity is that Welsh companies pay into the apprenticeship levy but the monies come back to Wales under the Barnett formula. Further, whilst all areas of the economy pay the levy, the Welsh government is looking to be prescriptive about the subject areas that apprenticeships will be offered in. So growth in Degree Apprenticeships will be slower and more limited, but as an industry-focussed institution, we will be looking to develop offerings in this area.

4. Manchester Metropolitan University

Manchester Metropolitan University has a global network of 270,000 alumni living in 130 countries. The University has a vibrant research approach across the areas of Arts and Humanities, Education, Business and Social Sciences, Health and Social Care, and Science and Engineering. Its research has led to the creation of biomedical devices that have saved thousands of lives. It has helped Governments to reduce carbon emissions. It has changed the way that young people are educated. It has protected human rights, addressed ageing, dementia and loneliness, and helped to make links between the arts, culture, wellbeing and the economy.

It also has over 300 students currently studying as part of an apprenticeship programme towards professional career in Chartered Management, Digital & Technology Solutions, Digital Marketing, Laboratory Science and Law. These areas include work with major global companies, for example the Chartered Manager Degree Apprenticeship programme blends McDonald's own in-house leadership development training and workplace experience, with the latest retail business theory. It has also launched a new mainframe variant of its Digital & Technology Solutions Degree Apprenticeship. The pathway, developed in partnership with Barclays, and recently supported by IBM, is designed to promote the continued use of mainframe technology in large organisations and address an identified skills shortage in this area.

Despite the fact it has a significant market-share in the emerging field of degree apprenticeships it plans further expansion. Its portfolio review and planning processes have focused attention on the size and shape of the University and on its relative lack of diversity in activity – the majority of its income derives from home UG full-time students; in 2014-15, they were in the bottom quartile of all HE institutions on income diversity. They are currently seeking to increase diversity through an expansion in postgraduate students, international students and Degree-level apprenticeships.

While this strategy reflects their belief in the importance of financial diversification, it also reflects their belief in the importance of a greater degree of diversification in the HE more generally. A diverse student body have different needs, preferences and circumstances, and they are committed to developing programmes which recognize and accommodate this. They are planning to develop accelerated two-year degrees in some appropriate disciplines and will continue to expand their degree apprenticeship provision.

Beyond the financial diversification these different delivery methods offer, they believe that a more diversified approach to gaining degrees has wider educational benefits. The close collaboration with employers which is fostered through its degree apprenticeship supports and encourages closer collaboration across all programmes, enabling them to increase collaborations with employers and entrepreneurs through curricular advice, teaching input, work experience and mentoring opportunities. This supports their strategy to ensure that they not only embed discipline-specific professional and vocational skills into their curriculum, but also develop (and become more explicit in its articulation of) a range of soft skills, resilience and adaptability which will best equip students for the challenging employment market.

They recognise a responsibility and mission to promote Higher Education for all, to support access to University to those within their community and to ensure that appropriate support and frameworks are in place to maximise success. They will continue to take an expansive approach to Widening Participation, supporting and assisting under-represented communities in their admission to a range

of universities. The development of more flexible approaches to the delivery of degree level education is a significant part of this strategy.

5. University of Teesside

Teesside University has a strong history of delivering distance-learning provision, specifically within Engineering at HNC/HND level since 2002. Known as Teesside University Open Learning Environment (TUOLE), in August 2017, the University had approximately 1700 students studying on programmes with the majority in employment and tending to be more mature learners from across the globe. The provision allows students to work at their own pace, subject to a minimum achievement requirement. The university's Virtual Learning Environment is utilised for students to access learning material and submit coursework.

More recently, the introduction to the sector of Higher and Degree Apprenticeships has seen Teesside University develop a number of offerings in conjunction with employers. 11 Degree and Higher Degree Apprenticeship opportunities currently sit across fields of digital technology, management and health, science, engineering and design with a number of other courses currently under development for a 2018 start. The growth of these students has been down to the year on year inclusion of new courses into the framework. Between 2015-16 and 2016-17 the number of students enrolled on these course more than doubled.

Specifically, within the School of Science, Engineering & Design, the school has seen a large number of enquiries, from a number of major civil engineering/infrastructure companies within the UK who are intending to enrol their regional employees for the 2018 entry. Similarly, the School has seen an increase in enquiries directly from individuals interested in the course.

The School has shown examples of Degree Apprenticeship development in collaboration with Fuji Film and CPI when designing the Laboratory Scientist (Biological Sciences) Degree Apprenticeship, initially with a pilot group of 5 apprentices. The Apprenticeship was further developed in 2017 to include a suite of automotive industry standards and the Development Engineering Standard and saw more individuals joining the programme.

6. University of Derby

Different delivery is a key area of growth for the University of Derby and it is actively looking to expand its offer for students. In 2011, it launched University of Derby Online Learning (UDOL) as a platform for the delivery of its wide range of online programmes. Since then, it has seen a 117% growth in enrolments and around 3,200 people studied with the university via this route during the last academic year. Online learners therefore make up a sizable proportion of its total higher education student body, which equates to almost 20,000 people.

Technical and vocational education is another area where it is looking to develop its provision to meet the needs of local businesses and provide more opportunities for young people and those wishing to upskill. It opened an Apprenticeships Hub a couple of years ago to support businesses with their training needs, and it currently has 183 apprentices in areas such as Cyber Security, Civil and Mechanical Engineering, Nursing, Mineral Products Technology and Management. Since the introduction of the Apprenticeship Levy in 2017 it has been working to design new apprenticeships to address skills gaps in the local labour market and it is already starting to see a positive impact. The

Minerals Technology industry, for example, previously struggled to recruit new employees and their existing workforce had an average age of 55. The University partnered with large business such as Tarmac, Aggregate Industries and Hanson UK to deliver apprenticeship programmes, which resulted in over 90 young people being recruited by the sector.

7. University of Dundee

Alternative provision has been a key part of the offering available for students of the University of Dundee for many years. It has taken an innovative approach to the learner journey, offering distance learning, blended learning, graduate entry and overseas provision across its disciplinary portfolio. In each of the last 5 years it has had over 5,000 students studying through distance learning provision on credit bearing courses, based in the UK and overseas. This equates to over 1,000 full-time equivalent (FTE), indicating that many are undertaking part-time study. This is a significant proportion of the total student body of almost 20,000 and excludes the students engaging with its offerings that are made available through the FutureLearn platform.

Its provision has an international reach, with 1,400 students (over 300 FTE) studying on credit bearing courses in an overseas location through distance, blended or transnational education. Its blended offering offers resources through its virtual learning environment supported by 'short burst' teaching weeks to give students the best of both worlds. Its Schools of Medicine, Dentistry and Nursing & Health Sciences work through distance learning provision, consultancy and in-country delivery to support the delivery of health care professionals in (for example) Eritrea, Kenya, Kuwait and Egypt.

As well as Distance and Blended options, it offers several conversion degrees in professional areas, allowing learners to convert a degree into a professional qualification in (for example) Nursing, Medicine, Education and Law. Its Law School and School of Nursing & Health Sciences also offer accelerated degrees. It has undertaken innovative approaches to its curriculum to increase its reach to widening access. It offers STEM co-curricular courses in partnership with Dundee & Angus College to help ensure that students in FE who wish to progress to university are better equipped to do so. It is currently working with local councils to retrain staff who may be at risk of redundancy to qualify as teachers, helping them to address both a financial obligation and the shortage of teachers in their workforce. This offering is akin to a graduate apprenticeship scheme. It also works with partners in the public, charity and private sectors to deliver continuing professional development to their staff across a broad range of disciplines, often professional, including medicine, nursing, education and law.

In 2017-18, it added Graduate Apprenticeships to its provision in response to a call from Scottish Government to increase these in Scotland. It works with partners in industry through a combination of work-based learning and high quality education that allows both employers and students to benefit from its provision. These are currently offered in IT Management for Business, IT Software Development, Engineering Design and Manufacture, and Civil Engineering. It is looking to broaden its offering into other disciplines. In its first year, it has 30 students engaged on graduate apprenticeships and it expects to grow numbers in the coming years.

8. University of Worcester

The University of Worcester has a number of established partnerships with alternative providers delivering higher education programmes to students who live some distance from Worcester on a flexible and distributed basis. These partnerships fall into two broad types: those that support access to higher education for students from low participation neighbourhoods and/or areas of the country where higher education provision is relatively scarce, notably in the South West (Cornwall, Devon and Somerset); and those that provide specialist training and education for which the University has an established reputation. Broadly, students studying via these means represent approximately 10% of the institution's total undergraduate student body.

Its partnerships with The Learning Institute, Iron Mill College and Somerset Centre for Integrated Learning deliver Foundation Degrees and Honours degree top-up courses at centres throughout the South West. These courses are mainly aimed at those working in learning support roles in schools and other educational settings, and more recently we have expanded the provision to also include those who work in support roles in health and social care. In 2016-2016-17, 748 students were enrolled on these programmes, over 44% of whom were from low participation neighbourhoods.

Its partnership with the National Childbirth Trust (NCT) has involved the University validating a number of continuing professional development awards, a Foundation Degree leading to qualification as a NCT Practitioner, and a top-up level 6 Honours degree providing preparation for more specialist roles within antenatal and early years parental education and support. The courses are delivered by NCT tutors at Centres throughout the UK on a 'blended' basis involving online learning and face-to-face teaching on a monthly basis. The University's expertise in the education of midwives, health professionals and early years professionals, made the University of Worcester the partner of choice for the NCT. In the nine years since the partnership was established over 450 students have achieved awards studying with the NCT.

The University of Worcester is currently developing its degree apprenticeship offer. The initial offer of a Chartered Managers Degree Apprenticeship (CMDA) has been developed and will be delivered in partnership with a FE College, with the College as the 'main provider' managing the relationships with employers and with the ESFA, and the University providing the knowledge component and academic awards – a Foundation Degree and top-up Honours degree – in partnership with the College. The Foundation Degree will be franchised for delivery by the College and there will be joint delivery by both partners of the top-up level 6 programme. Both partners will work together to manage the end-point assessment and liaise with the Chartered Managers Institute who oversee the CMDA professional awards. This partnership permits the College to grow its apprenticeship work to meet the needs of the employers with whom it has established close relationships, whilst at the same time enabling the University to learn from the College about the requirements for, and management of, apprenticeship provision. It is anticipated that the first cohort of approximately 20 apprentices will start in April 2018.

Appendix 5 – Scale of alternative delivery methods

This appendix summarises how the scale of different delivery method was calculated. The data reported in section 1 was taken from a population restricted to English and Scottish Higher Education Institutions, using the 2015-16 data and HESA's 'standard HE registration population', (see https://hesa.azureedge.net/derivedfields/c15051.zip).

For each of the following four categories of different delivery methods, we analysed the scale of provision from the population measured in headcount. In a small number of examples, the provision could be classified into more than one category. For example, a small number of institutions had an apprenticeship degree that was also classified as a distance learning course. In total, the proportion of courses that were neither condensed, apprenticeships nor distance learning was 75.9%. The absolute total proportion for each of the three modes was 25.2% (8.8% + 0.04% + 16.4%, see tables below), i.e. in the population 1.2% (75.9% + 25.2% less 100%) could be assigned to more than one different delivery classification.

a. Distance learning

From HESA student data we could specifically identify distance learning courses (see https://www.hesa.ac.uk/collection/c15051/a/locsdy).

Table 2 – Student numbers by mode of distance learning

Mode	2015-16	as a %
Distance Learning	184,371	8.8%
Not Distance Learning	1,920,606	91.2%
Total	**2,104,977**	**100.0%**

b. Apprenticeships

It was possible to identify apprenticeships broadly from the HESA student record (INITIATIVES: https://www.hesa.ac.uk/collection/c15051/a/initiatives). However, the latest data available is for 2015-16 when the apprenticeships initiative was still in its infancy and consequently this analysis is limited in value.

Table 3 – Student numbers by mode of higher apprenticeship

Mode	2015-16	as a %
Higher Apprenticeship	783	0.04%
Not Higher Apprenticeship	2,104,194	99.96%
Total	**2,104,977**	**100.00%**

A separate analysis using HESES16 data on apprenticeship numbers (which has been separately provided) was also considered. This indicated a higher number of apprenticeship students (approximately 4,000) but this still represents less than 1% of the population.

c. Condensed courses

It was difficult to identify the number and range of institutions offering accelerated, compressed or fast-track degrees, as there is no standard way to refer to and therefore identify and document accelerated degrees. As a result a proxy was developed using the definition of 'long'

that HEFCE used for funding purposes, (which is defined in the Higher Education Students Early Statistics (HESES) survey Annex J, for 2016-17, see http://www.hefce.ac.uk/media/HEFCE,2014/Content/Pubs/2016/201622/HEFCE2016_22j.pdf).

For full-time courses, the year of instance was classified as 'long' if students were normally required to attend for 45 weeks or more within that year of instance. If the year of instance was 45 weeks or more in length because of a period of work-based study, then the year of instance was not counted as long. This applied to both learning in the workplace and work experience. Sandwich years out cannot therefore be recorded as long, nor would HEFCE generally have expected foundation degrees to be recorded as long. For undergraduate students, long years of instance typically occur in accelerated programmes where the qualification is achieved in a much shorter time than normal. The number of credit points studied in the year is not a criterion in defining a long year of instance.

Table 4 – Student numbers by mode of 'long'

Mode	2015-16	as a %
'Long' Course	346,263	16.4%
Not 'Long' Course	1,758,714	83.6%
Total	**2,104,977**	**100.0%**

Appendix 6 – Research articles and seminars informing the review

This review was informed by recent research and seminars from a variety of sources. The table below provides a brief synopsis of the key items informing this work. It also provides other sources of reference for institutions to explore.

Table 5 – Research articles and seminars

Item	Source	Date of publication / event	Synopsis
The costs of alternative modes of delivery – a study for HEFCE	JM Consulting Ltd, http://dera.ioe.ac.uk/5170/1/rd14_03main.pdf (available here as archived on the HEFCE publication website)	August 2003	Summarises the results of a study into the costs of different modes of off-campus delivery of higher education. The main modes studied were foundation degrees, e-learning, distance learning, workplace learning, sandwich years-out, accreditation of prior experiential learning, and part-time study. Overall, it concludes that on a long-term basis these modes are usually more costly, but need not always be significantly more costly, than conventional delivery. It also stated that if significant growth takes place, it might also lead to a more systematic business model and that their cost structures will change and may lead to some economies of scale, which may partly off-set the additional investment required.
Final evaluation of the HEFCE-funded Flexible Learning Pathfinder projects	Steve Outram, Academic Lead, Higher Education Academy, https://www.heacademy.ac.uk/knowledge-hub/final-evaluation-hefce-funded-flexible-learning-pathfinder-projects	2011	Provides some real-life examples of accelerated degrees that were developed as part of an earlier 'pathfinder initiative. Among its key findings it noted that: - Pathfinders have had some success in introducing, sustaining and developing flexible provision, particularly accelerated degrees and work-based learning; and - There is some evidence of support by employers and professional bodies for flexible provision, including accelerated degrees. It also found that the main barriers to wider-scale expansion of flexible provision were found to be: - the costs and difficulties of implementing the necessary infrastructural changes; - the need to gain support from a wider body of staff; - the perceived cost of delivery of accelerated degrees; and - that accelerated delivery may only be suitable for certain subjects and certain types of student.
Report To The European Commission On	The High Level Group on the Modernisation of	October 2014	An examination of the developments in new modes of learning and teaching with a focus on the impact of technological change making a

Item	Source	Date of publication / event	Synopsis
New modes of learning and teaching in higher education	Higher Education, http://ec.europa.eu/dgs/education_culture/repository/education/library/reports/modernisation-universities_en.pdf		series of recommendations across national and European policy, training and guidelines. It found that new technologies can facilitate greater collaboration, both with global partners and at a more local level and methods of teaching can be better tailored to individual students' needs and advances in learning analytics are enabling quicker feedback on students' performance. It addition, it accepted that whilst higher education institutions and, more particularly, teaching staff are the main actors in delivering these pedagogical changes, it is the responsibility of public authorities to create the environment and incentive for action. It recommended that traditional providers must diversify their offering and provide more courses online, especially targeting continuing professional development and lifelong learning. Realising these ambitions is not a straightforward task. It will involve significant changes in how higher education institutions operate, as well as a change in culture and mind-set.
Russell Group response to BIS Call for Evidence: Accelerated Courses and Switching University or Degree	Russell Group, July 2016, www.russellgroup.ac.uk/media/5449/russell-group-response-accelerated-courses-and-switching-university-or-degree-july-2016.pdf	July 2016	For accelerated degrees it sets out three key points to explain why it is problematic for institutions which excel in high-level, research-led teaching: • Shortened courses would require academics to teach in periods typically designated for research, making the provision of research-led teaching extremely difficult. • Accelerated degrees could also limit the time for independent learning and reflection as well as reducing opportunities to take part in programmes designed to develop employability skills. • Condensing three years of teaching into two without altering the financing model under which annual tuition fees are capped would also prove financially unsustainable.
Accelerated degrees in Higher Education – Literature review	Institute for Employment Studies, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/595637/Accelerated_Deg	March 2017	A synopsis of the scale of undergraduate accelerated degrees in the UK and more broadly and identified barriers and challenges, benefits and their delivery and operation. They found that: • A few UK institutions have offered and still continue to offer accelerated degrees across a number of disciplines; • Inhibiting take-up was the perception that these degrees were of inferior quality;

Item	Source	Date of publication / event	Synopsis
	rees_Literature_Review.pdf		• Barriers for institutions included the perception that these course were more costly to develop and deliver and do not fit well within the current funding system but also evidence to challenge some of these perceptions. Also a lack of awareness, strong cultural norm for the traditional approach, concerns about having a less satisfying and more limited student experience, perceptions that it would involve a heavy workload with less time for reflection and deep learning, and lead to lower outcomes and higher living costs per year coupled with less time to do paid work. • Recognition of evidence that suggests satisfaction and learning outcomes are the same if not better for accelerated degrees / courses / programmes. However, this may be driven by the characteristics, preferences and motivations of the kinds of students attracted to accelerated study. For the future it recommended a range of demand and supply side actions and that: • Whilst there is little sharing of practice, there is the potential to learn much from the early adopters and sustained deliverers about how to provide accelerated degrees, and do it well; and • Aspects that appear to be important and require careful consideration in the design of accelerated degrees are: marketing and market research; working with prospective students; programme design; senior level buy-in; staff buy-in and support; effective student support (including building and supporting peer cohorts); and effective administration systems. Additionally, institutions may want to consider taking a different pedagogical approach.
The Complete Guide to Higher and Degree Apprenticeships	Which? University, https://university.which.co.uk/teachers/introduce-higher-education-options/higher-and-degree-apprenticeships-guide-download	2017	A current list and guide to Apprenticeships offered by institutions. It also contains a synopsis of what an apprenticeship is, how it is funded, grades required and work involved.
Accelerated degrees:	UUK	1 June 2017	A one-day seminar to give delegates a better understanding of the policy landscape and a

Item	Source	Date of publication / event	Synopsis
understanding the opportunities			clearer idea of how to implement accelerated degrees in their institution.
Keynote Seminar: Accelerated degrees and credit transfer – putting the Higher Education and Research Act into practice	Westminster Higher Education Forum	22 January 2018	A half-day seminar that gave delegates a better understanding of the key issues for institutions and students including the pricing, marketing and demand for accelerated courses, practical issues for provision affecting the lecturing workforce, the use of resources and facilities, and catering for the individual and extenuating circumstances of students.
The Scale of UK Higher Education Transnational Education 2015–16 – Trend Analysis of HESA Data	UUK International, www.universities uk.ac.uk/Internati onal/Documents/ The%20Scale%20 of%20UK%20HE% 20TNE%202015-16.pdf	January 2018	It notes: • Higher education transnational education (HE TNE) is an increasingly significant and successful characteristic of UK universities' international activity; • 75% of students studied with just 11% of UK universities; • TNE expansion seems to have stabilised in traditional markets and is growing more rapidly in newer markets; and • Slowed rates and relatively low numbers in many cases reflect a lack of intelligence available to universities, or policy contexts which limit the volume and type of activity in-country, or domestic higher education systems which successfully meet demand.
The Scale and Scope of UK Higher Education Transnational Education	HEGlobal, a joint initiative between the UK HE International Unit and the British Council, www.britishcounc il.org/sites/defaul t/files/scale-and-scope-of-uk-he-tne-report.pdf	June 2016	From 2014-15 data and earlier, it noted that: • There are only 15 countries in the world where the UK does not offer any HE TNE. • The growth rate of TNE students between 2013-14 and 2014-151 is 13%, compared to the 11% reported in the overall HESA AOR (an aggregate offshore record with well-documented limitations). • Business and Management is the UK HE TNE subject delivered in most countries. Following that, Medicine and related studies programmes are delivered across a high number of countries, and then Arts & Humanities. • Since 2012-13, the flexibility of offer in mode of delivery has increased. More programmes are now being offered as full time, part time, or both.
One Size Won't Fit All – The Challenges Facing the Office for Students	Higher Education Commission, supported by University Partnerships Programme. The	September 2017	In summary, the Commission: • thinks that the sector can do more to deliver the industrial strategy; and • believes that the funding regime poses a serious challenge to the diversity of the sector.

Item	Source	Date of publication / event	Synopsis
	inquiry was sponsored by the Association of Chartered Certified Accountants, BPP University, and Jisc (the UK higher, further education and skills sectors' not-for-profit organisation for digital services and solutions). www.policyconnect.org.uk/sites/site_pc/files/report/1005/fieldreportdownload/hec-web.pdf		

Appendix 7 – Detailed survey results

This appendix provides the results of a survey that was undertaken to better understand different delivery methods in institutions. The survey was emailed to 170 institutions across England, Northern Ireland, Scotland and Wales. It contained eight questions designed to:

- Understand some of the thinking undertaken in developing provision;
- Identify the areas of different delivery methods to explore further; and
- Identify participants willing to share further details on their experiences and be part of the case study phase of work.

35 responses were received from the following countries 21% of the 170 issued. Nil returns were received from Northern Ireland.

Table 6 – Survey responses by country

Country	Completed response received	Incomplete or nil response	Completed responses as a % of total
England	30	103	23%
Northern Ireland	0	3	0%
Scotland	2	16	11%
Wales	3	13	19%
Total	**35**	**135**	**21%**

The findings from the completed responses are summarised in this appendix.

a) Zero respondents had 'pure' employer co-sponsoring course, though institutions identified flexible part-time and work-based learning programmes which had an element of employer sponsoring.

b) 62% had work-based, 72% had distance learning and 88% of respondents had blended learning. The three lighter bars in the chart given below correspond to the modes previously identified by the Oversight Group as areas for the case studies.
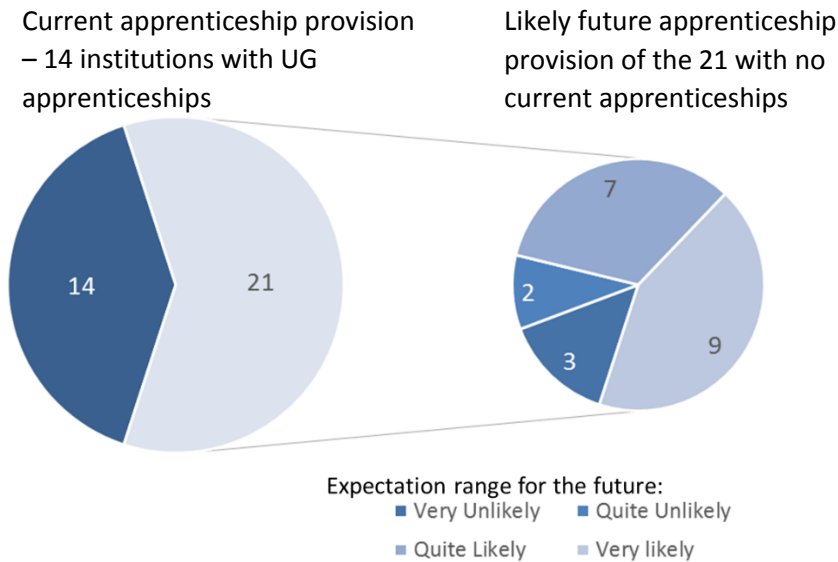
Chart 6: Frequency of different delivery methods from completed responses
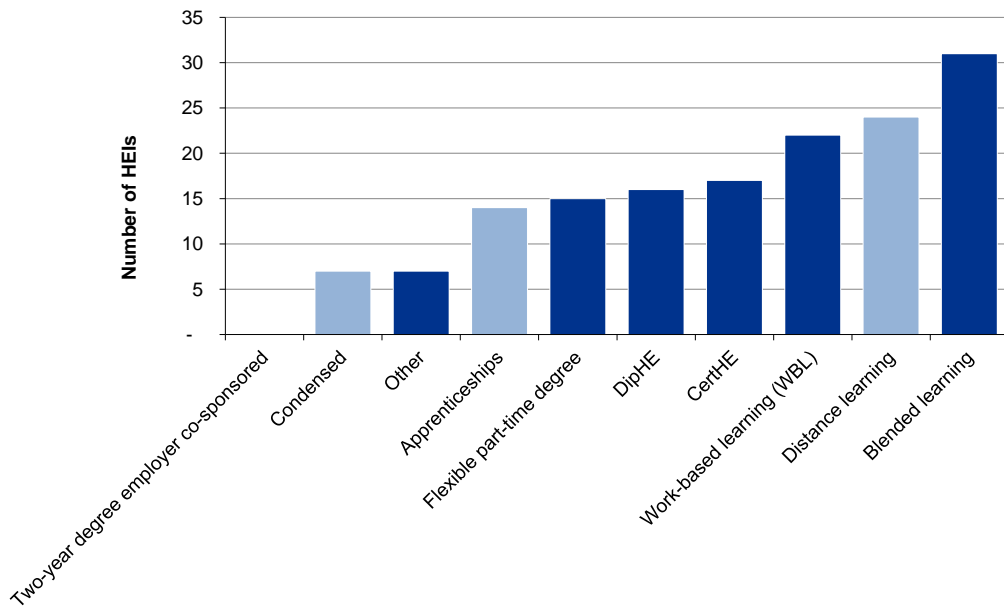
Source: Alternative provision survey September 2017

c) 40% of respondents have apprenticeships. Of those that do not, 76% think that it is likely that they will develop apprenticeship programmes in the future.

Chart 7: Current UG degree apprenticeship provision and future institution intentions from the survey of 35

Current apprenticeship provision – 14 institutions with UG apprenticeships

Likely future apprenticeship provision of the 21 with no current apprenticeships

Expectation range for the future:
■ Very Unlikely   ■ Quite Unlikely
■ Quite Likely   ■ Very likely

Source: Alternative provision survey September 2017

d) Institutions ranked a suggested list of factors into order of importance, from 1 as the most important, to 8 the least. From an analysis of the average scores from 35 institutions, student employability and demand were reported as more important factors.
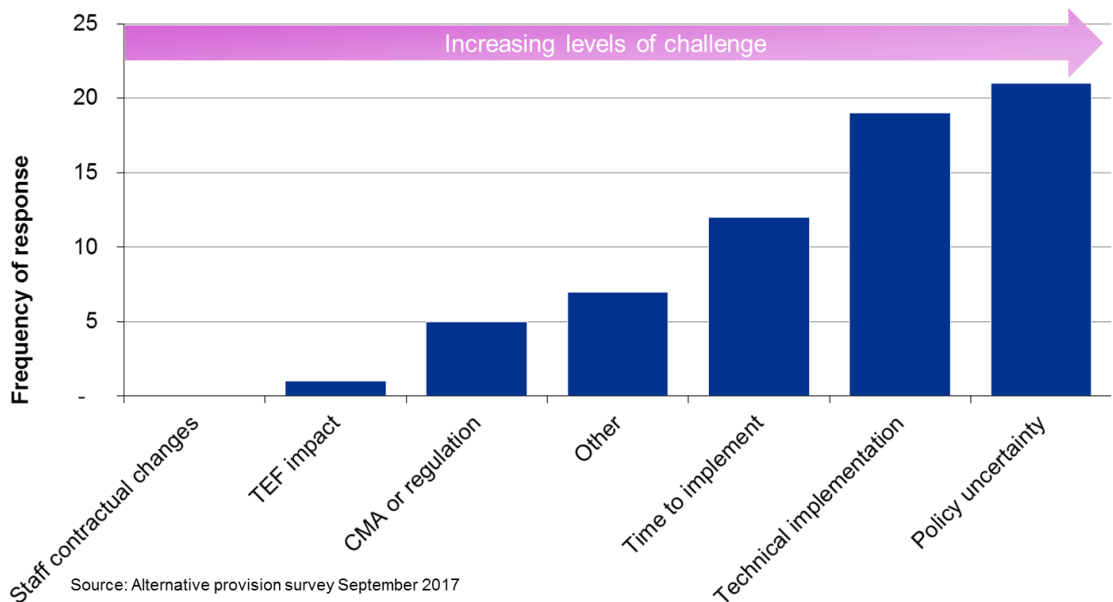
Chart 8: Distribution of importance factors for developing different delivery methods
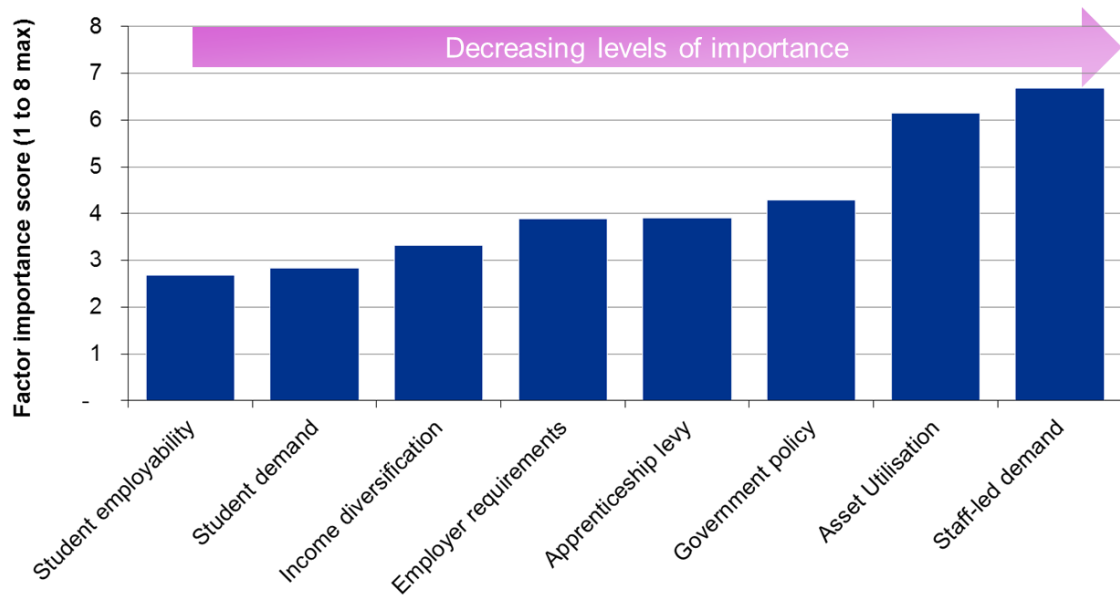
Source: Alternative provision survey September 2017

e) Of the challenges reported, policy uncertainty and implementation of the courses were the most frequent.

Chart 9: Frequency of challenge factors

Source: Alternative provision survey September 2017

f) The survey contained an open question on the benefits found from different delivery methods. An assessment of the responses was undertaken to aggregate into a summary. 30 of 35 institutions provided a range of benefits covering a number of different areas. The remainder indicated that either they did not know yet, had no benefits to date, or provided a negative view. The chart shows the frequency and range of benefits reported. Achieving greater student diversity or access was the most frequent response reported.

Chart 10: Frequency of benefits from different delivery methods
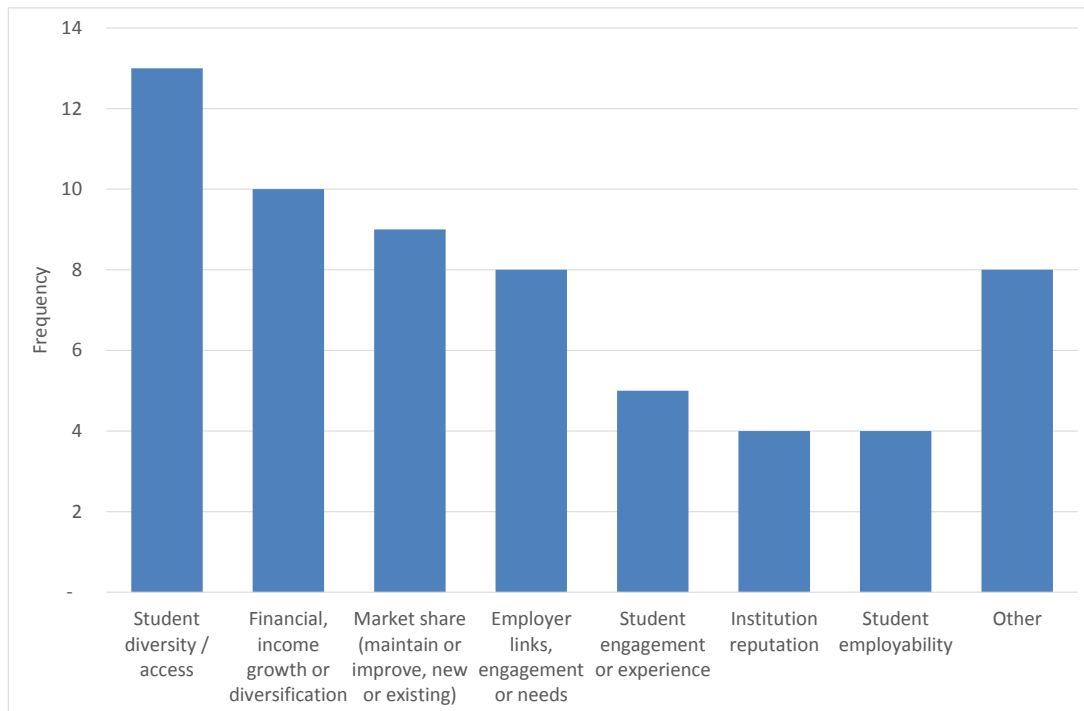
g) The survey requested open responses on the key lessons for similar or future different delivery methods. A wide variety of actions were identified that included three common areas for focus:
*   **Business cases** – within this institutions prioritised the development of accurate and complete costings, a balance of expected benefits, greater transparency over complex delivery models and appropriate resource levels;
*   **Market analysis** – high quality activities to better estimate the likely cohort sizes; and
*   **Speed of change** – to establish and develop different delivery methods within expected timescales.

Chart 11: Frequency of lessons for future development of different delivery methods
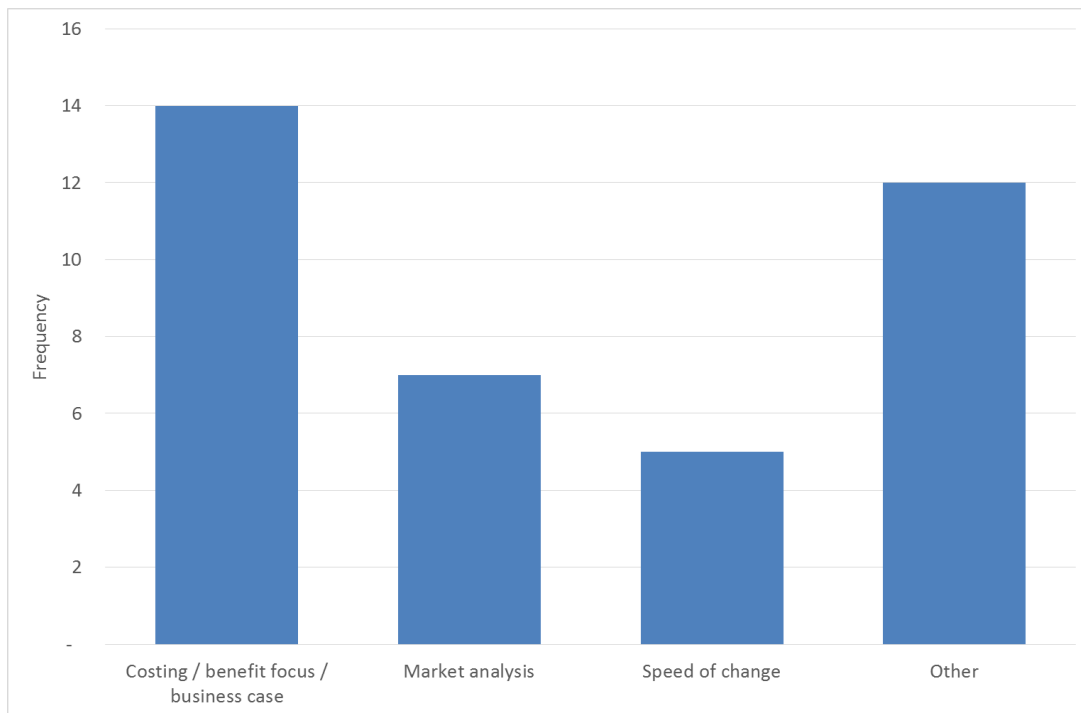
Source: Alternative provision survey September 2017

The 'other' category contained a wide range of responses that included:

- Clarifying policy and the impact of the regulatory overhead (this latter element could have been made in considering the development of future business cases or plans);
- Gain timely student feedback and learner engagement;
- Identify enthusiastic employers and work effectively with them;
- Integrate delivery modes via virtual learning environment and improve their consistent application;
- Consult with other institutions; and
- Develop a high quality offering / high quality online materials.