Collaborate to compete

Seizing the opportunity of online learning for UK higher education

Report to HEFCE by the Online Learning Task Force
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OLTF
Online Learning Task Force

Contents

1. Introduction

By Dame Lynne Brindley, Online Learning Task Force Chair

1.1.   The Online Learning Task Force was established in mid-2009 by HEFCE, and was asked to address how UK higher education (HE) might maintain and extend its position as a world leader in online learning. It was also invited to consider international opportunities, ways to encourage flexibility in UK provision, online pedagogy, how to support institutions to take full advantage of rapidly developing technology and rich sources of content, and to ensure quality provision to meet rapidly changing student demands.

1.2.   The Task Force has concluded that online learning – however blended with on- or off-campus interactions, whether delivered in the UK or overseas – provides real opportunity for UK institutions to develop responsive, engaging and interactive provision which, if offered at scale, can deliver quality and cost-effectiveness and meet student demands for flexible learning.

1.3.   The recent Comprehensive Spending Review, the Browne report[1] and the forthcoming White Paper give a new and even more challenging context to the work of the Task Force. The pressures of severe constraints on public spending, and a shift towards a more de-regulated, market approach to higher education, combined with the increasing need to put student demand and choice at the centre of higher education provision, require radical thinking. These factors are creating new dynamics in the higher education system and gave added impetus to our work.

1.4.   Technological change is rapid. Developing and adopting appropriate pedagogy for its exploitation in learning and teaching is less rapid, and the skills and organisational changes that are needed alongside this take even longer. Online learning thus presents challenges on many fronts. At the same time, current and future generations of students expect high-quality, flexible online learning experiences.

1.5.   The Task Force comprised experts from the academic sector and a number of private sector technology and content companies. We listened closely to student voices and to potential students; we consulted widely with sector bodies, private online learning and content providers, and employers. We commissioned short reports and held a major seminar 'What next for online learning?' to cross-check our thinking with a wide range of experts. We have collated and shared examples of good practice and success; we have extracted lessons from past ventures. We discovered that reliable baseline data is scarce, and even definitions of what constitutes online learning are unclear.

1.6.   I would like to thank all those who contributed their expertise, views, experience and time to our endeavour, as well as all the members and officers of the Task Force for their valuable and impressive contributions. It has been a challenging pleasure to work with them over the past year. We drew on Professor Sir Ron Cooke's important report on 'Online Innovation in Higher Education'[2] which still remains relevant, and we were ever mindful that this country set a world standard for distance learning by establishing, some 40 years ago, the Open University.

1.7.   The Task Force discussions have been robust and always lively. We shared a broad sense of direction, but members held differing views about the urgency of change, the relative importance of on-site and online offerings, the strength of competitive challenges and need for organisational change – reflecting the diversity of the higher education sector, and institutional missions and strategies.

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[1] The Independent Review of Higher Education Funding and Student Finance, led by Lord Browne, was tasked with making recommendations to Government on the future of fees policy and financial support for undergraduate and postgraduate students. Its final report, 'Securing a sustainable future for higher education in England' (October 2010), is available at http://hereview.independent.gov.uk/hereview/report.

[2] This was written as a contribution to the debate launched in 2008 by John Denham, then Secretary of State for Innovation, Universities and Skills, which eventually led to the publication of the 'Higher Ambitions' framework for higher education in 2009. It can be downloaded from http://webarchive.nationalarchives.gov.uk/20090902220721/ http://www.dius.gov.uk/higher_education/shape_and_structure/he_debate/e_learning.aspx (accessed 3 November 2010).

1.8. At all times we aimed to put the rapidly changing demands of students in higher education, and potential students currently studying in schools, at the centre of our thinking. We also considered, among others, older students, part-time learners and those living outside the UK.

1.9. This report documents successful and diverse case studies of institutional and consortia provision, including partnerships between HE institutions and the private sector. These case studies deserve careful study across the higher education sector as each institution considers its strategic options for the next five to ten years. But the report can only give a flavour of the exciting possibilities: each case study in Annex 3 shows a wealth of imaginative offerings that point us towards an even more exciting future.

1.10. The international market for online learning is growing rapidly although estimating its size remains a challenge. While UK higher education institutions are extremely successful in attracting international students to study in the UK there are also opportunities for growth in online and more flexible patterns of provision which combine UK and home country study; online, blended and on-campus UK experience. However, universities in many countries are strong competitors to the UK for these markets, and private sector providers are moving in quickly and aggressively. Similar opportunities for enhanced flexibility apply within the UK as students seek more work-based, flexible and part-time opportunities, to fit work and learning opportunities into their lives. 'Going to university' will take on many, varied meanings and manifestations over the next ten years.

1.11. We want this report to count. We hope it will make an important contribution to moving online learning up the strategic agenda for policy makers and for universities and colleges. There are both opportunities and imperatives for full engagement with this agenda. Several matters we highlight are not new, but they acquire added urgency as we look at the changing face of higher education domestically and globally. It is important for the UK to fulfil rapidly changing student demand and to exploit the opportunities afforded by today's web-based technologies to change our thinking and to innovate

faster. We want to grow the UK's share of expanding markets internationally and contribute to the national economy, sustaining the competitiveness and reputation of UK higher education both at home and across the globe.

1.12. The HE sector has been talking about the potential of online learning for well over ten years. The moment has come if we wish to remain and grow as a major international player in higher education. This report offers some of the ways towards achieving our goals.

2. Summary of recommendations

1 Technology needs to enhance student choice and meet or exceed learners' expectations

Online programmes need to be of comparable quality and standard to other programmes. Students need greater support to ensure their study and academic literacy skills are fit for the digital age. Information about online programmes is lacking and often difficult to find, both for distance courses and for the online learning elements in blended programmes. This has a significant impact on student choice, domestically and internationally. Only with better information can prospective students find what they want, judge value for money and make more accurate decisions about where and how to study. Better information will give institutions competitive edge – private providers demonstrate some excellent examples of how to do this effectively – particularly given the wider context of student choice driving demand.

A number of organisations are focused on improving the information that is available to prospective students to help them judge value for money and make accurate decisions about where to study.

Responsibility for improving information lies with HE providers as part of work to develop the Key Information Set, in liaison with HEFCE[3] (and potentially other funding councils in the future), UCAS[4], Universities UK (UUK), GuildHE[5], and the Association of Colleges (AOC)[6]; ensuring comparable quality and the development of study and academic literacy skills is the responsibility of institutions, the Quality Assurance Agency for Higher Education[7] and the Higher Education Academy (HEA)[8].

2 Investment is needed to facilitate the development and building of consortia to achieve scale and brand in online learning

Quality online learning is not a cheap option. Through collaboration, institutions can achieve significant economies of scale and more rapid development and adoption of technologies, for example in the development of learning resources or in sharing the risk of developing new forms of provision. This approach enables institutions and organisations (that are perhaps already collaborating in other areas) to exploit their joint brands and extend them into new markets, offering innovative, quality provision. Collaboration should embrace and harness the strengths of diverse institutions and organisations, across public-private and sector divides.

One way in which collaboration could be achieved is through a national competition that would look to invest around £20 million per year for five years in some three to five consortia, whether in subject disciplines, regional links or institutional groupings, building on successful collaborative ventures to ensure we continue to compete effectively in the future. Each country in the UK might wish to take forward appropriate schemes.

Responsibility of national government and devolved administrations – suggested investment of £20 million per year for five years.

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[3] HEFCE distributes public money for higher education in England. For more information see www.hefce.ac.uk.

[4] UCAS is the organisation responsible for managing applications to higher education courses in the UK. For more information see www.ucas.com.

[5] UUK and GuildHE are representative bodies for higher education institutions in the UK. For more information see www.universitiesuk.ac.uk and www.guildhe.ac.uk.

[6] The AOC is the representative body for colleges in Great Britain. For more information see www.aoc.co.uk.

[7] The Quality Assurance Agency for Higher Education is responsible for safeguarding quality and standards in UK higher education, checking how well universities and colleges meet their responsibilities and suggesting ways they could improve. For more information see www.qaa.ac.uk.

[8] The HEA supports the sector to enhance the student learning experience. For more information see www.heacademy.ac.uk.

3 More and better market intelligence about international demand and competition is required

The sector needs to work together to collect and share market intelligence and, in particular, make better use of what is already produced by UK Trade and Investment (UKTI) and the British Council. Market intelligence is key, but obtaining it individually is likely to be beyond the means of many. Providers around the world are embracing, developing and embedding online learning, and may well attract students away from UK institutions, so there is clearly an imperative to improve the situation. Institutions in the UK may well be competing with each other for students, but they all share a responsibility for promoting UK HE as high quality, responsive and globally competitive.

Responsibility of UUK, GuildHE, AOC, UKTI[9], British Council[10] and individual institutions.

4 Institutions need to take a strategic approach to realign structures and processes in order to embed online learning

The need to address student expectations and remain competitive should help drive developments in online learning and ensure its development and use are aligned with institutional mission. Institutions and organisations need to invest in learning, and leadership and vision at the highest level is required to bring a step-change. Such changes will not occur rapidly enough without effective organisational structures and processes. Online learning is a strategic issue, not a simple, bolt-on option. Institutions need to ensure staff understand the range of challenges and opportunities provided by online learning, and ensure what they do is cost-effective and high quality. A strategic approach across the whole institution will enable staff to overcome barriers to adoption.

Responsibility of institutions, but the HEA and Leadership Foundation[11] have a role to play.

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[9] UKTI works with UK-based businesses to ensure their success in international markets and encourage the best overseas companies to look to the UK as their global partner of choice. For more information see www.ukti.gov.uk.

[10] The British Council is the UK's international cultural relations body. For more information see www.britishcouncil.org.

[11] The Leadership Foundation provides a dedicated service of support and advice on leadership, governance and management for all the UK's universities and higher education colleges. For more information see www.lfhe.ac.uk.

5 Training and development should be realigned to enable the academic community to play a leading role in online learning

To move online learning forward needs sensitive management and coordination of effort. Staff may be willing to engage with technology to meet the expectations of students, or require encouragement and training to so do, but in both cases they need support to be effective. There needs to be a stronger understanding of the potential of web-enabled learning and the use of social media, greater prioritisation of teaching partnerships between technologists, learning support specialists and academics, and an end to the 'not invented here' syndrome. Mixed teams working together on the pedagogic and technological elements of online learning enable institutions to offer innovative, up-to–date, high-quality provision. Good practice must also be shared.

Responsibility of institutions (drawing on appropriate sources of support, such as the Professional Standards Framework[12] and other work currently coordinated by the HEA) and the Joint Information Systems Committee (JISC)[13].

6 Investment is needed for the development and exploitation of open educational resources to enhance efficiency and quality

There is no point duplicating effort to create content that is already available and has been proven to work. Institutions can build on the existing open educational resources initiative (funded by HEFCE, managed by the JISC and the HEA) to achieve economies of scale and efficiencies. In addition they can pull in the best content and openly available learning resources from around the world and adapt them for particular courses. Students can then access a richer, wider range of material to enhance their learning experiences wherever they are studying, and leading experts can build a profile beyond their institution. There are also significant opportunities for partnership with private organisations to produce content that is interactive, responsive and pedagogically effective.

Responsibility of the JISC, HEA and the Open University (as part of its national role) – suggested investment of £5 million per year for five years, awarded under broad direction from funding councils.

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[12] The Professional Standards Framework is owned by the sector and enables institutions to apply to their professional development programmes and activities and thus demonstrate that professional standards for teaching and supporting learning are being met.

[13] The JISC is a UK organisation, funded by all the UK higher and further education funding bodies to provide IT infrastructure, education and research and to promote innovation in the use of information and communication technology. For more information see www.jisc.ac.uk.

3. Student diversity, demand and expectations

We placed great emphasis on understanding the needs of students to ensure online learning is high quality and encourages new and different kinds of students to engage with UK higher education.

A key aspect of our work was to investigate current perceptions of online learning in UK higher education institutions and the level of demand from new and potential students. We commissioned the National Union of Students (NUS) to research this area for us[14], and drew on the considerable experiences of Becta, the technology strategy agency that particularly worked in schools and further education.

3.1 Student perspectives on online learning and technology

The NUS study identified that students see online learning and technology as providing a range of challenges and opportunities. Students also have some concerns. We were particularly interested in observations that:

- *students prefer a choice in how they learn –* information and communication technology (ICT) is seen as one of many possibilities, alongside part-time and traditional full-time learning, and face-to-face teaching. Students respond to a range of possible learning methods rather than one or two prescribed options

- *students expressed concerns regarding the ICT competencies of lecturers –* there are varying levels of ICT competence on the part of lecturers and staff and although some are clearly skilled or at least able to function in an IT setting, others were considered to lack even the most rudimentary IT skills, with 21 per cent of students thinking their lecturers need additional training

- *appropriateness of learning technology varies significantly from course to course –* students value the incorporation of ICT into their learning experience but the extent to which this occurs varies depending on course, type of study and assessment

The Open University has developed its own style of online learning called 'supported open learning' giving its 250,000 students flexibility to study when and where suits them best. This is in keeping with the university's founding mission to be open to people, places, methods and ideas.

- *at present, most students are self-taught in IT skills –* the majority have learned to use computers in their own time. Students reported acquiring information in a more cursory and less detailed fashion using ICT, and felt they lacked skills to make the best use of such sources. They also wanted more information about correct research and referencing skills

- *students prefer to be regarded as partners in the development of online learning rather than mere recipients.*

Students have other considerations when it comes to online learning that provide institutions with valuable opportunities to reconsider the academic culture. For instance, many are interested in reducing the cost to them of learning – they may be seeking lower living expenses, they may want to enter the job market as soon as possible, or they may want to manage their learning with other commitments. But, whatever it is they want to do, they will want to do it without affecting the quality of their degree experience.

Flexibility in delivery is paramount. For example, students on the Foundation Degree in Protective Security Management offered by Buckinghamshire New University are serving in the armed forces, using the internet to communicate with tutors, while working and learning in Iraq and Afghanistan.

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[14] 'Student perspectives on technology – demand, perceptions and training needs: Report to HEFCE by NUS' (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

Students are attracted to the potential of online learning to enable them to interact with students from different backgrounds and countries and break away from the 'bubbles' of their own physical institutions. HE institutions need to create opportunities for social interaction and social learning among distance learners, emphasising the element of international exposure for their students.

3.2 Online learning within schools and further education colleges

The NUS research focused on the views of students currently engaged in higher education study. In order to improve our understanding of what future HE students may expect, we also drew on work about the type and nature of online learning taking place within primary and secondary schools and further education (FE) colleges[15]. We heard that online learning is a priority for many schools, particularly at secondary level, extending learning beyond the classroom and providing remote study access for all learners. There has been significant recent growth in the adoption of virtual learning environments[16] in primary and secondary schools. In 2005-6, around half of secondary schools had adopted a virtual learning environment, rising to almost all by 2009-10.

Digital resources are more likely to be used in FE for teaching in the classroom rather than by students accessing learning remotely. As with schools, though, there are gaps in the confidence and competence of practitioners, which impact on the student experience. Student experience is also highly dependent on the particular college. Trends in capability are good in the college sector, although a significant proportion of

The challenge for Walsall College is to offer cost-effective, flexible access to higher-level courses, at disparate locations and usually in a modular form. Online learning allows it to reach many more companies and individuals more cost-effectively.

college practitioners do not yet make routine use of technology in learning and teaching.

This indicated strongly to us that in the next five to ten years institutions will be working with students with much higher expectations, demands and requirements when it comes to technology and online learning. We also know that from an early age, learners are using the web and electronic social networks and naturally expect communication in these media. Institutions need to invest time, effort and energy to ensure they respond to these challenges. They also need to recognise that for other learners these media may be less familiar.

3.3 Students expect greater flexibility in provision

It is essential to understand the rapidly changing needs and expectations of current and future students. Learners are increasingly able to navigate high-quality, open and online resources and can do this through social networks, which in some cases are more supportive contexts in which to develop skills. New broadcast and distribution channels such as iTunes U[17], Youtube and Wikipedia demonstrate this trend. Learning environments and contexts are becoming increasingly participative and the learner's

All [distance] students at the London School of Hygiene and Tropical Medicine are part-time, with the vast majority also being in full-time employment. Many come from low- and middle-income countries or work in international development, so particular attention has been given to developing appropriate course design and content. Distance learning courses are designed as self-study opportunities with a strong link to the face-to-face teaching programme in aspects such as content, assessment and staffing.

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[15] Becta presentation to Online Learning Task Force: 'Online learning in schools and FE colleges', September 2010.

[16] A virtual learning environment is a collection of integrated tools enabling the management of online learning, providing a delivery mechanism, student tracking, assessment and access to resources (source: JISC infoNet).

[17] iTunes U is a specialised area of the Apple iTunes store that allows higher education institutions to make audio and visual content available for download and subscription.

contribution is highly valued by teaching professionals. However, students also need to develop their skills in digital and information literacy – for example, evaluation of the usefulness of varying types of web sources/information.

Online distance learning (ODL) provides students with the flexibility to study at their own pace, in their own time and at a location convenient to them. This may be required because of other commitments, or because they want/need to study while working. Some may opt to study from the workplace. Institutions need to be able to offer courses and programmes that are adaptable to individual student circumstances. Although ODL enables students to study from any location within the UK or internationally, it also means that it is possible to choose to study online programmes offered by a local university. Nearly half of online students in the United States live within 50 miles of the main university campus delivering their course[18]. This trend has also been observed in the UK, for example the HE programmes offered online by the University of Essex and Kaplan Open Learning, where many students are based in Essex and London.

3.4 It can be challenging to find information about online provision

We commissioned research[19] that revealed that identifying online distance learning courses on the web can be a challenge for prospective students

Distance learning programmes at the University of Leicester are flexible, high-quality and focused on students and their needs. Eighteen thousand students have graduated from its distance learning programmes and more than 8,000 are currently studying. The university encourages the formation of networks of students as a vital source of peer support.

The challenge for Newcastle College was to devise a programme that was truly work-based while delivering new skills and giving learners adequate academic and practical support to feel part of the community. A blended model of delivery was chosen to give most flexibility.

because information about the courses is often 'hidden' in complex institutional web-sites. Where details are available, they frequently fail to provide the full range of information that a potential online student needs to decide whether a course meets their requirements. Institutions need support to improve their web-sites to mirror the searching methods of potential students and provide more relevant information on course offerings.

Institutions need to optimise the visibility of their online learning offer through major search engines, particularly when it comes to competing for international students[20]. Institutions also need to be creative and innovative in their approaches to marketing in order to attract students to online learning. The Open University, for example, has successfully attracted students by placing small segments of content for informal learning on iTunes U.

Proposed and likely changes in the provision of information and guidance for prospective students, as discussed in HEFCE's current consultation[21], need to take account of online provision. If institutions are to produce a Key Information Set (KIS) for all their provision (as discussed in the consultation) this should obviously include their online courses. Where courses use blended learning, institutions need to indicate this clearly to students. Any Student Charters that are developed would have to take into account online learning to ensure they were relevant to all students. We would also like to see online distance

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[18] Source: Kaplan Open Learning presentation to Online Learning Task Force, January 2010.

[19] 'Study of UK Online Learning: Report to HEFCE by the Department for Continuing Education, University of Oxford' (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

[20] Ibid.

[21] For more information see 'Public information about higher education: Consultation on changes to information published by institutions' (HEFCE 2010/31), available at www.hefce.ac.uk under Publications.

data collected by the Higher Education Statistics Agency, and there is value in considering how the National Student Survey can be used to understand experiences of online learning and technology.

3.5 Being clear about the opportunities and benefits

There is much on offer to students from both the UK and internationally who wish to engage with HE whether flexibly, online, or at a distance. However, as we have already discussed, it is hard to discern on institutions' web-sites, and as a country we do not publicise our offerings individually or collectively in the way that we should. The network infrastructure, the open educational resources, the undoubted expertise in supporting organisations, and the range of provision already available in many institutions around the UK are all underplayed. As a sector we need to publicise collaboratively what we do and what we offer to attract more international students in an increasingly competitive climate.

UK and international students stand to benefit. In particular, for international students, online learning offers opportunities for increasing flexible provision that enables them to combine home country and international study. Universities may be able to use this approach to increase opportunities for students to be fully prepared in advance of studying in the UK – i.e. that they are suitably qualified for the experience, that their early study can be completed cost-effectively in their home country, and that necessary visas are in place in advance of need.

Recommendation 1

Technology needs to enhance student choice and meet or exceed learners' expectations

Online programmes need to be of comparable quality and standard to other programmes. Students need greater support to ensure their study and academic literacy skills are fit for the digital age. Information about online programmes is lacking and often difficult to find, both for distance courses and for the online learning elements in blended programmes. This has a significant impact on student choice, domestically and internationally. Only with better information can prospective students find what they want, judge value for money and make more accurate decisions about where to study. Better information will give institutions competitive edge – private providers demonstrate some excellent examples of how to do this effectively – particularly given the wider context of student choice driving demand.

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4. UK competitiveness

The Task Force originated in part in recognition of a concern to ensure that the UK keeps and extends its competitive position in a burgeoning international market. The UK occupies a leading position in attracting international students, but we wanted to encourage and focus attention on wider opportunities.

It was striking that no real overview of online (distance) provision existed. We commissioned research to improve this, resulting in the 'Study of UK Online Learning' report from Technology-Assisted Lifelong Learning at the University of Oxford[22]. This report has proven useful in understanding the nature of provision in the sector today but it will quite rapidly become out of date and require regular updating.

The findings of the report were discussed alongside a wide range of other information which included the lessons from previous unsuccessful online ventures and various international experiences and business models, case studies offered to the Task Force and input from the 'What next for online learning?' seminar in June 2010.

4.1 Study of UK online learning

The Oxford research demonstrated significant activity in the UK HE and FE sector developing and delivering ODL programmes, with many institutions keen to expand their offerings in this area.

Setting aside the unique characteristics of the Open University, the research discovered that the majority of programmes were at a postgraduate level, but significant numbers of pre-undergraduate courses were identified. These are the courses that could be used to provide students with a progression route into

Twelve of the University of London's 19 colleges offer distance-learning provision through International Programmes. There are currently approximately 50,000 students, 88 per cent of whom are from overseas from 198 different countries and 12 per cent from the UK.

The University of Essex, in partnership with Kaplan Open Learning, offers online courses in the home/EU market, which are flexible, accessible, provide practical work-based skills and can fit around work and family commitments which prevent students from attending a traditionally delivered course.

undergraduate degree study. The research suggests there is significant activity in the UK HE and FE sectors to develop and deliver ODL programmes, with many institutions keen to expand their offerings in this area.

4.2 Business lessons from unsuccessful online ventures

Though we focused on the future development of online learning, we did not ignore previous experiences. We investigated some high-profile examples of unsuccessful online ventures[23] which are now either no longer operating or have significantly under-performed against original expectations. Regardless of the specific reasons for these failures, they help in identifying ways to minimise some of the risks involved in developing this kind of provision. Key points of learning include:

- there are many ways to deliver online education successfully: institutions can learn from others' experience but the approach they choose must reflect their own organisational arrangements, culture and values

- clarify the purpose: institutions need to know what they hope to achieve from online learning ventures

- understand the market and what students want: from the outset there needs to be clarity about the markets in which the venture will operate

- invest in a robust business plan: initial investments can be substantial, programme lead times lengthy, and enrolments slow to build up.

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[22] 'Study of UK Online Learning: Report to HEFCE by the Department for Continuing Education, University of Oxford', (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

[23] Our research explored six high-profile case studies, mainly from the past ten years: Cardean University, Fathom, the UK e-University, AllLearn, U21Global and the University of Illinois Global Campus.

There needs to be a realistic assessment of break-even points and the factors that might prevent their attainment. All the elements should be kept under review and updated when necessary

- acknowledge and address cultural issues: some ventures failed because they did not sit easily within the existing organisational culture

- build on existing success: starting something entirely new is high risk. Institutions will often do better by building on existing success in distance education and e-learning, or by forming partnerships with organisations that can provide such expertise

- learn from others: institutions can learn from others' successes and failures in areas such as choice of business model, use of technology, pedagogy and quality assurance, proven markets and realistic timescales

- ensure leadership and ownership: online learning should be seen as a strategic opportunity or priority, requiring leadership from the top

- invest for the long term: a large investment gain from a quick sell-off is unlikely. It is essential to review progress regularly and adjust activities accordingly.

4.3 Learning from international experience

We looked at international experience and business models, highlighting ventures where the online element was predominant, as distinct from broader forms of distance education. The research made a range of assessments of major operators that are currently successful.

The decision to partner with private sector organisations that have experience in distance learning operations was vital to the success of implementing distance learning provision at the University of East London (UEL). The establishment of UEL's partnership with International Correspondence Schools (ICS) was crucial to achieve a rapid and viable entry to the distance learning market.

The University of Liverpool offers 20 online programmes, with over 6,000 students registered from over 150 countries. Delivered in partnership with Laureate Online Education, the programmes are targeted at working professionals in the disciplines of IT, management, health, law and psychology.

The international market is growing rapidly, though defining it properly or estimating its size remains a challenge. There are many models for online provision – case study examples we considered include the experiences of the Open University, the University of London, the University of Liverpool (in partnership with Laureate) and the University of Essex (in partnership with Kaplan). It is reasonable to assume that the market is large and diverse enough to accommodate different types of operation, though so far it seems that, with the exception of the Open University, private, for-profit providers have been the most conspicuously successful in working at scale. Some of these are already clearly highly profitable, possibly because they operate on a large scale and experience no internal conflict with an existing non-profit culture. The size, profitability and ability of these operations to innovate give them a strong and growing competitive advantage.

The Bloomsbury Learning Environment is a shared learning platform developed by the Institute of Education, the London School of Hygiene and Tropical Medicine, the Royal Veterinary College and the School of Oriental and African Studies, and also used across Birkbeck. It is the first example of a multi-institutional implementation of the Blackboard Academic Suite in the UK. The collaboration, established in 2004, provides many benefits including sharing technical support, pedagogic expertise, cost efficiencies on licence fees and collaborative funding opportunities. The colleges also share costs for remote hosting of Blackboard, freeing up dependency on IT infrastructures and support within the colleges.

4.4 Success through partnership and effective investment

We have become more and more conscious that online learning is not a cheap option. It requires significant investment. However, it offers the prospect of significant economic benefits in future years – benefits that the UK cannot afford to miss. Making the required investment remains realistic, even in the current economic climate, if the business model adds up. Savings achieved through collaboration and efficiencies of scale can help to spread the cost of the initial outlay.

Unless institutions collaborate to grow the market, UK HE may be less able to compete effectively in future on a global scale. Competition between UK institutions from the outset is likely to diminish individual institutions' market share and the effectiveness of UK higher education as a whole.

It is also vital that institutions improve their knowledge about student demand in the home and global market. Although some have developed a strong understanding, more market intelligence would benefit the whole sector. The vocational trend in ODL provision creates a feasible framework for gathering market intelligence, especially for those courses offered at postgraduate level. Better market intelligence is also needed to identify which aspects of online learning need targeted support[24].

Recommendation 2

Investment is needed to facilitate the development and building of consortia to achieve scale and brand in online learning

Quality online learning is not a cheap option. Through collaboration, institutions can achieve significant economies of scale and more rapid development and adoption of technologies, for example in the development of learning resources or in sharing the risk of developing new forms of provision. This approach enables institutions and organisations (that are perhaps already collaborating in other areas) to exploit their joint brands and extend them into new markets, offering innovative, quality provision. Collaboration should embrace and harness the strengths of diverse institutions and organisations, across public-private and sector divides.

One way in which collaboration could be achieved is through a national competition that would look to invest around £20 million per year for five years in some three to five consortia, whether in subject disciplines, regional links or institutional groupings, building on successful collaborative ventures to ensure we continue to compete effectively in the future. Each country in the UK might wish to take forward appropriate schemes.

Responsibility of national government and devolved administrations – suggested investment of £20 million per year for five years.

Approximately 8,000 students are currently enrolled on BPP University College award programmes. All materials are fully available online, consistently across all modules, with the virtual learning environment being the central spine of the student learning experience. Online learning and resources are not just for 'online students'. They can be crucial aspects of learning for all students.

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[24] 'Study of UK Online Learning: Report to HEFCE by the Department for Continuing Education, University of Oxford' (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

Recommendation 3

More and better market intelligence about international demand and competition is required

The sector needs to work together to collect and share market intelligence, and in particular make better use of what is already produced by UKTI and the British Council. Market intelligence is key, but obtaining it individually is likely to be beyond the means of many. Providers around the world are embracing, developing and embedding online learning, and may well attract students away from UK institutions, so there is clearly an imperative to improve the situation. Institutions in the UK may well be competing with each other for students, but they all share a responsibility for promoting UK HE as high quality, responsive and globally competitive.

Responsibility of UUK, GuildHE, AOC, UKTI, British Council and individual institutions.

5. Strategy, processes, culture

A number of our discussions centred on institutional challenges and barriers to meeting rapidly changing demands from students for increased and flexible online learning, whether on campus or remotely delivered. We were also clear that it is institutions' responsibility to lead such change, as has been emphasised before in previous HEFCE policy statements[25]. We heard from – and about – a number of institutions tackling these challenges[26].

Standing still is not an option if the UK HE sector is to maintain its quality and competitiveness, and meet the future expectations of students. In order to support collaboration and enable economies of scale, it is essential that institutions take a strategic approach to embedding online learning provision, and adapt their organisational structures and processes appropriately. This may require a significant change in academic and organisational culture.

5.1 The institutional perspective

Many of the key cultural change issues relate to staff. Not all staff are willing, or able, to engage with technology, which can mean that student expectations are not met. Even where staff are keen to engage with online learning, the level of support for them may be inadequate. Mixed teams within institutions represent a key contribution to success, combining academic and subject expertise, with learning technologists, pedagogic experts, and content specialists (e.g. librarians) working closely together.

Some successful for-profit models of online provision have benefited from using a different staff structure to that of UK HE institutions, with freelance tutors focusing on facilitation, teaching and assessment, with

At Nottingham Trent University (NTU), the university sees e-learning not as a separate activity but as a feature of how people learn in the 21st Century. It was important to NTU to embed online learning throughout the university. Their approach was both top down and bottom-up. The top-down drive was led by the Vice-Chancellor and by the Director of Libraries and Knowledge Resources. The bottom-up drive came from the enthusiasm and ingenuity of committed academics and developers. An important aspect of NTU's strategic approach is that the university has set and enforced minimum standards for the online learning that it expects Schools to provide.

no expectation of engaging in research activity. In some cases tutors are asked to mark work within 48 hours of submission to respond to particular student demand. A problem sometimes experienced with this structure is that tutors are unable to access university library facilities if their contracts mean that they are not employed by a UK HE institution, and no other arrangements are made.

Learning technology is pushing people to reconsider the issue of 'teaching' time. However, academic contracts in many post-92 institutions may constrain development because of hourly quotas assigned to teaching time. For example, how does online tutoring count? Does a lecture online count as a teaching contact hour? This has implications for staff flexibility and any changes require close work with unions.

Responsibility for distance learning courses at the London School of Hygiene and Tropical Medicine is shared with the University of London International Programmes. The London School of Hygiene and Tropical Medicine sets, delivers and monitors the academic content and integrity of the courses. International Programmes manages specific administrative functions such as student admissions, dispatch of study materials and coordination of examination arrangements.

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[25] In particular, 'Enhancing learning and teaching through the use of technology: a revised approach to HEFCE's strategy for e-learning' (HEFCE 2009/12), available at www.hefce.ac.uk under Publications.

[26] A list of contributors is available at Annex 2.

The aim at the University of Edinburgh is to make distance education, where relevant, a normal part of the university's academic business. This will require applying lessons from other universities as well as learning from Edinburgh's own experiences.

Beyond the specific learning and teaching environment, technology can free up time (central timetabling and room allocation for example), as well as helping to enhance reputation and access to resources (e.g. an institutional repository for all publications by university academics). It is likely that, in creating an e-environment across the whole institution for as many processes as possible, using learning technology very quickly becomes an integral part of everyone's experience.

Ultimately, institutional success in delivering online provision on or off campus depends upon good leadership and appropriate support to identify the strategy, the risks, the resources, and the benefits.

5.2 The staff perspective

There needs to be ongoing professional development for staff to ensure they are sufficiently aware of technology and deliver programmes that meet student ICT needs and expectations. There is scope for the Higher Education Academy to integrate ICT skills into the UK Professional Standards Framework[27] to a greater extent: these skills can be a part of institutional promotional criteria, and as part of selection criteria for teaching awards. Shared service organisations such as the JISC and independent communities such as the Association for Learning Technology also provide important opportunities for staff development.

Before embarking on its programme to embed online learning throughout the university, Nottingham Trent University considered who would resist change and their motivations for resistance. The university recognised that some staff would resist the move to online learning because they lacked confidence with the new technology and, from the outset, the university trained staff to overcome this hurdle.

5.3 The student perspective

The NUS study[28] reported a number of key findings about the provision of ICT, which reinforce the level of the challenge.

A major concern for students is the (sometimes perceived rather than actual) lack of personal contact with their tutors and fellow students in online learning. Learning in virtual worlds is a possible solution for students, as is use of effective online conferencing. But, more importantly, HE institutions need to enable students to enter and learn collaboratively online with appropriate pedagogies, training and availability of technologies.

5.4 Developing high-quality materials, content and tools for online learning

There are many sources of quality materials, content and tools, including private sector publishers and online educational providers, such as Pearson. An interesting and significant international trend in recent years has been the development and adoption of open educational resources and user-generated content, which have been major factors in the success of some public institutions. Organisations in the private sector have also developed their own, new, flexible, fit-for-purpose models for deployment of content. We are seeing an increasing volume of openly available resources for education being made available for re-use.

The University of East London identified expansion of distance learning as a key institutional priority in 2004. Strong institutional leadership and high-level commitment to ensuring the university's strategic approach to development and the provision of distance learning was, and still is, fundamental to achieving changes to institutional policies and procedures.

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27 The UK Professional Standards Framework (UKPSF) for teaching and supporting learning, launched in February 2006, is a flexible framework which uses a descriptor-based approach to professional standards.

28 'Student perspectives on technology – demand, perceptions and training needs: Report to HEFCE by NUS' (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

The University of Leicester's 'Learning Innovation Strategy' offers a framework that develops and extends the range of services and approaches already in place. It also helps to deepen understanding and deployment of learning technologies throughout the university so that departments can make informed choices.

Open educational resources give students access to a broader range of content, ranging from lecture notes and audio podcasts to interactive learning materials, available through fixed and mobile platforms. We realise that wider adoption of open educational resource approaches to online learning raises complex issues of copyright and intellectual property. Nevertheless we think that they offer a catalyst for change and exemplars for good teaching practice and collaboration at scale. One business model is to use openly available resources as a free 'taster' for content through platforms such as iTunes U, with the prospect of good conversion rates as individuals subsequently sign up for accredited degree courses (e.g. the Open University). Using open educational resources can also provide a cost-effective way for teaching institutions to offer greater choice to students by embedding high-quality shared expertise in their courses, from national and international sources. However, the sector will need to be sensitive to the need for a level playing field between public and private providers if resources are shared at scale and mostly created by publicly funded institutions.

Students do not expect online learning to be a poor substitute for other forms of provision. For on-campus learning, they want it to be a way to guarantee quality engagement that comes in addition to time in front of a lecturer. For many it is a way to ensure that they can

study anywhere, and at any time, which is becoming a more common expectation among students as they study alongside other commitments. Online learning presents us with the opportunity to have a more sophisticated understanding of the debate around contact hours. Academics and students are able to use the technology to increase and deepen engagement alongside the more traditional concepts of contact time between teacher and learner.

The Open University virtual learning environment is integrated with student records and systems for curriculum design and e-assessment. About 500,000 assessments were submitted online in 2009, resulting in more rapid and flexible feedback to students on their progress.

The contexts of learning are moving out of traditional spaces into a more mobile world – in which learning can genuinely take place in the workplace and through new lifelong contexts: as shown by iPhone and Android phone platform developments and newer topics such as 'augmented reality'. As technologies become more available, more mobile and ubiquitous, institutions will need to refresh notions of pedagogy to cope with shorter, sharper interactions coupled with smaller units of learning content delivered to handheld devices.

Concerted efforts will need to be made to support the academic community to engage with the online learning agenda. As we have mentioned, students and staff clearly identified a need for ongoing development and training to improve confidence and competence in online learning.

The University of London International Programmes operates under the principle, enshrined in university statutes, that the academic standard of University of London awards is attained irrespective of mode or place of study. All programmes offered by the International Programmes lead to awards of the University of London, the degree-awarding authority.

The sector needs to focus on pedagogical design of online learning as well as assuring that our national and institutional ICT infrastructure keeps pace with technological development, to maintain quality and meet the future expectations of students. There are some very good examples of pedagogical design, and institutions need to find a way to share and develop best practice in order to benefit the whole sector. The HEA may be the organisation to take this forward, building on successful examples of online learning provision.

Institutions need to act strategically to avoid online learning being seen as additional or 'bolt-on' to other missions. We make three recommendations to address this.

The role of strong, coherent leadership throughout the institution cannot be underestimated if the sector is to develop and maintain excellence in online learning, responding to changing student demands, and remain globally competitive. Institutions might be able to draw on support from organisations such as the Higher Education Academy or the Leadership Foundation, but ultimately they are the ones that need to make the right strategic judgements if they are to succeed.

Obviously, institutions invest in the training and development of the academic community. However, we believe more needs to be done to ensure that staff are fully supported in the technical and pedagogical aspects of online learning. We endorse the decision by the Higher Education Academy to consider how the Professional Standards Framework can be used to develop staff. The JISC also has valuable expertise in developing the skills of the academic community.

We suggest that the JISC, the HEA and the Open University continue to promote the use and reuse of open educational resources across the sector, under a broad strategic direction from HEFCE.

Recommendation 4

Institutions need to take a strategic approach to realign structures and processes in order to embed online learning

The need to address student expectations and remain competitive should help drive developments in online learning and ensure its development and use are aligned with institutional mission. Institutions and organisations need to invest in learning, and leadership and vision at the highest level is required to bring a step-change. Such changes will not occur rapidly enough without effective organisational structures and processes. Online learning is a strategic issue, not a simple bolt-on option. Institutions need to ensure staff understand the range of challenges and opportunities provided by online learning, and ensure what they do is cost-effective and of high quality. A strategic approach across the whole institution will enable staff to overcome barriers to adoption.

Responsibility of institutions, but the HEA and Leadership Foundation have a role to play.

Recommendation 5

Training and development should be realigned to enable the academic community to play a leading role in online learning

To move online learning forward needs sensitive management and coordination of effort. Staff may be willing to engage with technology to meet the expectations of students, or require encouragement and training to so do, but in both cases they need support to be effective. There needs to be a stronger understanding of the potential of web-enabled learning and the use of social media, greater prioritisation of teaching partnerships between technologists, learning support specialists and academics, and an end to the 'not invented here' syndrome. Mixed teams working together on the pedagogic and technological elements of online learning can enable institutions to offer innovative, up-to-date, high-quality provision. Good practice must also be shared.

Responsibility of institutions (drawing on appropriate sources of support, such as the Professional Standards Framework and other work currently coordinated by the HEA) and the Joint Information Systems Committee (JISC).

Recommendation 6

Investment is needed for the development and exploitation of open educational resources to enhance efficiency and quality

There is no point duplicating effort to create content that is already available and has been proven to work. Institutions can build on the existing open educational resources initiative (funded by HEFCE, managed by the JISC and the HEA) to achieve economies of scale and efficiencies. They can pull in the best content and learning resources from around the world and adapt them to individual academic contexts. Students can then access a richer, wider range of material to enhance their learning experiences wherever they are studying, and leading experts can build a profile beyond their institution. There are also significant opportunities for partnership with private organisations to produce content that is interactive, responsive and pedagogically effective.

Responsibility of the JISC, HEA and the Open University (as part of its national role) – suggested investment of £5 million per year for five years, awarded under broad direction from funding councils.

6. **Conclusion**

We worked collaboratively with many groups and individuals over the last year. Our recommendations reflect this. They highlight many things that have been said before but not widely heeded. They do however come at a time when technology, internationalism, curricula, and the power and nature of the student voice have moved forward. These features make our recommendations timely and important.

There are actions needed within FE colleges, HE institutions, and other organisations, across national and sector bodies, and by governments to promote effective, high-quality online learning if the UK is to retain and take forward its reputation and market share for higher education provision. We make the point that now is the time to seize the opportunity of online learning and have produced recommendations that point to how this can be done.

Institutions, organisations, bodies and groups need to work together; we truly believe in the title of our report 'Collaborate to compete'. The case studies submitted to us show some of what is happening now. Imagine if more of this was being done in concert and the power it could have to raise further the reputation of UK HE for innovative, high-quality learning.

Annex 1

Membership and terms of reference of the Online Learning Task Force

Members

Martin Bean, Vice-Chancellor, Open University

Steve Beswick, UK Director of Education, Microsoft

Dame Lynne Brindley (Chair), Chief Executive, British Library

Professor Philip Garrahan, HE Consultant, formerly Pro Vice-Chancellor, Sheffield Hallam University

Professor Caroline Gipps, Vice-Chancellor, University of Wolverhampton

Richard Halkett, Director of Strategy and Research, Cisco

Sharon Huttly, Professor and Dean of Studies, London School of Hygiene and Tropical Medicine

Sir Alan Langlands, Chief Executive, HEFCE

Sobroto Mozumdar, President of Higher and Professional Education, Pearson Education Ltd

Michael Munn, Director, UK and Ireland Education Business, Apple

Don Olcott, Chief Executive, The Observatory on Borderless Higher Education

Professor Sir Timothy O'Shea, Principal, Edinburgh University and Chair of JISC

Aaron Porter, President, National Union of Students

Professor Gilly Salmon, University of Leicester

Professor Rick Trainor, Principal, Kings College London

Kevin Van-Cauter, Higher Education Advisor, British Council

John Widdowson, Principal, New College Durham

Martin Williams, Director of Higher Education, BIS

Adviser

Judith Nichol, Knowledge Partnerships Manager, BBC

Observers

Malcolm Read, Executive Secretary, JISC

John McLaughlin, BIS

Professor David Sadler, Director of Networks, Higher Education Academy

HEFCE Officers

Gemma Cadogan, Higher Education Policy Adviser, HEFCE

Heather Fry, Director, Education and Participation, HEFCE

Alan Palmer, Higher Education Policy Adviser, HEFCE

Rachel Pennington, Senior Higher Education Policy Adviser, HEFCE

Terms of reference

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

To achieve this, the Task Force will:

- Identify opportunities for investment leading to further innovation within and between universities and colleges in the development of online learning, to include informal and flexible entry pathways and the building of critical mass.

- Identify ways in which collaboration between universities and colleges and other organisations in the public and private sectors can be further enhanced.

- Identify ways in which universities and colleges can do more to encourage new students (and new types of students), both in the UK and internationally, to engage with UK higher education.

- Identify what further steps might be necessary to help UK higher education to take advantage of new and expanding international markets, by collecting evidence of the current position, competition, barriers, etc.

- Identify ways in which staff with teaching responsibilities can best adapt and expand their capabilities in order to support a new generation of online and blended-provision learners and continue to meet these needs as technology develops further.

- Make recommendations to HEFCE and other agencies, especially the JISC and Higher Education Academy in order to stimulate the identification and growth of good practice and innovation in online learning.

- Encourage co-operation between UK funding bodies, universities and colleges to support this strategy.

Annex 2

Acknowledgement of contributors

The Online Learning Task Force (OLTF) has benefited from a wealth of expertise, experience, research and information via presentations, commissioned research, responses to discussion papers, and meetings with institutions and sector representatives. The OLTF would like to thank the following individuals and organisations for their contribution to the work of the Task Force:

Lead authors of research commissioned by the OLTF:

David James	(HE Policy Consultant at HEFCE)
Aaron Porter/Alex Bols	(National Union of Students)
David White	(Senior Manager, Technology-Assisted Lifelong Learning, University of Oxford)

Guests invited to present at the OLTF meetings:

Gráinne Conole	(Professor of e-learning, Open University)
Professor Neil Gorman	(Vice-Chancellor, Nottingham Trent University)
Alan Jenkins	(Managing Director, Kaplan Open Learning)
Vanessa Pittard	(Director, e-Strategy, Becta)
Elizabeth Rouse	(Pro-Rector for Academic Development and Quality, University of The Arts London and Chair of the Open Education Resources Strategic Advisory Committee)

Presentations at OLTF seminar 'What next for online learning?':

Martin Bean	(Vice-Chancellor, Open University)
Stuart Hamilton	(Chief Executive Officer at Open Universities Australia)
Roxanne Stockwell	(Group Innovation Director at BPP)

Responses to the March OLTF discussion paper:

University of Central Lancashire

City University, London

University of Essex and Kaplan

University of Glamorgan

University of Leicester

London School of Hygiene and Tropical Medicine

Loughborough University

University of Oxford

University of Salford

Staffordshire University

University of the West of England

University of Wolverhampton

Association for Learning Technology

British Film Institute

JISC Learning and Teaching Committee

Re.ViCa Consortium (Review of (Traces of) Virtual Campuses)

Wiley Education Solutions

Meetings with institutions, individuals and sector representatives:

Libby Aston	(Director, University Alliance)
Martin Watkinson	(Director of Strategy, Open University)
Professor James Barber	(Vice-Chancellor and President, University of New England, Australia)
Doug Becker	(Chairman and CEO, Laureate Education)
John Latham	(Vice President of International Business Development, Laureate Education)
Lord Browne of Madingley	
Professor Les Ebden	(Vice-Chancellor, University of Bedfordshire and Chair of Million+)
Pam Tatlow	(CEO of Million+)
Professor Ruth Farwell	(Vice-Chancellor, Buckinghamshire New University and Chair of GuildHE)
Alice Hynes	(former CEO of GuildHE)
Sarah Frame	(Director of UELConnect, University of East London)
Madeleine King	(Policy Manager, Association of Colleges)
Martin Doel	(Chief Executive, Association of Colleges)
Professor Jonathan Kydd	(Dean of University of London International Programmes)
Andrew Bollington	(Chief Operating Officer, University of London International Programmes)
Professor Sue McKnight	(PVC, University of Canterbury)
Lord David Puttnam	(Chancellor, Open University)
Professor Steve Smith	(President, UUK)
Nicola Dandridge	(Chief Executive, UUK)

The Task Force recognises the contribution of organisations that are already active in supporting UK HE as a world leader in online learning: for example, the British Council, the Higher Education Academy and the Joint Information Systems Committee. Valuable lessons have been drawn from these organisations in terms of successful shared services, academic development, marketing/promotion and intelligence opportunities.

Annex 3

Case studies written by institutions

Case studies from individual institutions reveal examples of highly effective online learning provision. The whole HE sector stands to benefit by sharing the benefits of experience gained. These case studies – which have been written by the individual institutions themselves – were either volunteered or sought out and were drawn on as the Task Force reached its conclusions.

BPP University College

BPP is a private provider which has held degree-awarding powers since 2007. It was granted university college status in July 2010, becoming the only private for-profit provider to be granted this status. Approximately 8,000 students are currently enrolled on BPP Award programmes. Approximately 400 are part time and 300 are distance-learning students.

In 2007, BPP piloted the presentation of all materials online, including extras such as online lectures (downloadable recordings of the live lectures), online independent tutorials (versions of the tutorials students could work through in their own time) and online catch-up classes (using synchronous classroom technology, where students are working at the same time as each other). When asked what was the best aspect of studying at BPP the top response was the e-learning – and this came from students who studied primarily face-to-face, but also online. Asked why they chose BPP, the following year's intake responded that the online learning/resources was the second most important reason. This suggested that online learning and resources are not just for online students – they can be crucial aspects of learning for all students.

As a result, BPP developed an online learning strategy that is designed to assist all students. Online resources are fully comprehensive, meaning all materials are available online, consistently across all modules. All readings, lectures, seminar/tutorial instructions, assessments etc. are available to all students on any given module, providing 100 per cent consistency of resources and instructions. All students need to visit the virtual learning environment (VLE) every week in order to plan their study. This means that the VLE is now the central spine of the student learning experience. All BPP students are therefore described as online students.

The pedagogical approach is based on the need for students to interact with each other and the tutor in weekly structured seminars, whether students are face-to-face or online. Students can participate in their weekly seminars in three ways: face-to-face, with students and the tutor present together at the same time and in the same place; 'realtime' classes, using synchronous class technology (students and tutor attend at the same time but from anywhere in the world where they have an internet connection); and 'yourtime' classes, asynchronous classes in which students can attend from anywhere with an internet connection and at a time/s to suit them (the most flexible option). The classroom is a wiki/blog/discussion board open for five days a week.

All seminars work through the same questions in the same weeks so they are fully synchronised. Everyone does the same assessments and markers are unaware of what type of student they are grading. This consistency gives very high flexibility. Students can choose different seminar experiences for each module and attend alternative classes in any given week with the tutor's permission. This approach gives students the chance to customise their learning experience according to their changing circumstances over the course of a programme, and enables BPP to work with employers to choose the best combination for their needs.

What started as the online learning strategy is now called the Integrated Learning Strategy and is being implemented as part of BPP's approach in designing degrees.

The Bloomsbury Learning Environment

The Bloomsbury Learning Environment (BLE) is a shared learning platform, developed by the Institute of Education, the London School of Hygiene and Tropical Medicine, the Royal Veterinary College and the School of Oriental and African Studies, and also used across Birkbeck. It is the first example of a multi-institutional implementation of the Blackboard Academic Suite in the UK.

Tutors place lecture notes, PowerPoint presentations, podcasts of lectures and other course-related materials on dedicated course areas, which students can access remotely from anywhere in the world via the internet. Students are therefore able to access

their course materials at times which suit them and are able to make any adjustments they may need (e.g. a visually impaired student can adjust font sizes). They can also submit electronic copies of their assessments through the platform.

The BLE can be used to track progress, monitored by both students and their tutors. A variety of tools are available, which provide opportunity for student-led content, both individually and collaboratively authored. These tools include discussion boards, wikis and blogs. The BLE supports and encourages collaborative and personalised learning, accommodating students of all learning styles and abilities. Each college has its own unique BLE interface, but all benefit from coming under one licence.

The collaboration, established in 2004, provides many benefits including sharing technical support, pedagogic expertise, cost efficiencies on licence fees and collaborative funding opportunities. The colleges also share costs for remote hosting of Blackboard, freeing up dependency on IT infrastructures and support within the colleges.

Buckinghamshire New University

Buckinghamshire New University has long been committed to meeting the needs of employers, working with them to ensure course content is up-to-date and relevant. As a new university with a long history of providing good-quality education, the university is committed to constantly reviewing delivery methods to engage students and ensure that they are able to make the most of the university experience wherever they may be situated. The 'New' in the university name is about being innovative, forward-thinking and able to meet the needs of a rapidly changing modern world and a diverse student body.

The university's International Centre for Crowd Management & Security Studies offers foundation degrees tailored to the events and security industries, specifically foundation degrees in Crowd Safety Management, Business Management for the Security Industries, and Protective Security Management.

Close protection as a profession dates back to the Romans, with the Praetorian Guard protecting dignitaries from potential attack. Now, the profession is more complicated with close protection professionals undertaking risk and reputation

management duties, as well as protecting and defending people and property. The threat from terrorist organisations and 'fanatical' individuals adds another dimension to the work, and makes the demand for qualified personnel even greater.

The foundation degree in Protective Security Management is the only course of its kind offered by a university. It provides students with the opportunity to develop their work-based specialist skills, supported by professional tutoring, both online and through workshops. Flexibility in delivery is paramount; many students are serving in the armed forces, using the internet to communicate with tutors, whilst working (and learning) in Iraq and Afghanistan.

In 2008, the university signed a partnership agreement with IT giants, HP and Cisco, designed to transform the learning experience for students. Thanks to a converged voice, video and data network, students can collaborate using, among other methods, instant messaging, voice emails and streaming video. The new network frees students from the need to physically be on campus to undertake their courses. Students on the Close Protection course are required to 'attend' workshops, but may do so by video conferencing technology if they are unable to attend in person.

The format for courses has been repeated at other levels, with the university currently offering a master's in Business Continuity, Security & Emergency Management, and introducing MSc programmes in Security Infrastructure & Landscape Design and Aviation Security, which will begin next year. Five security short courses of 18 weeks are taught purely with online materials, and enable students to earn 20 credits at level 4, and the university has just introduced a distance learning 20-week level 7 Certificate in Security Management.

Graduates from the Close Protection foundation degree programme have found it a rewarding experience and are often encouraged to go further with their professional development through higher education. Online learning will continue to grow as a key component of the university's provision, with the university's International Centre for Crowd Management & Security Studies building upon its reputation for innovative courses that tap into the needs of the events and security industries, and recognising the requirements of students who may not always be able to engage with traditional methods of delivery.

University of East London

The University of East London (UEL) identified expansion of distance learning as a key institutional priority in 2004. Strong institutional leadership and high-level commitment to ensuring the university's strategic approach to the development and provision of distance learning was, and still is, fundamental to: achieving changes to institutional policies and procedures; the creation of a centralised unit 'UELconnect' with responsibility for all distance and e-learning provision; and the partnership with commercial organisations.

Distance learning at UEL is managed on a commercial basis and therefore has to demonstrate financial viability. Creating a centrally managed operation was felt to be one of the key factors required to develop and implement a financially viable enterprise.

Although some of UEL's distance learning programmes are delivered entirely online, UEL also provides text-based materials in response to learner demand. Students use the university's VLE to: engage in discussion forums; access their course content, student handbooks and additional learning resources; chat; and undertake group work. The university also utilises a wide range of learning technologies to enhance the learning experience – including virtual classrooms, lecture capture, podcasts, wikis, virtual worlds, immersive learning scenarios.

The university has been enrolling approximately 1,000 students per year on the distance learning undergraduate programmes, with between 700 and 1,000 module examinations being successfully completed at each assessment point.

Vital to the success of implementing distance learning provision at UEL was the decision to partner with private sector organisations experienced in distance learning operations. Of these current providers, ICS (International Correspondence Schools) is UEL's major partner. This case study examines the partnership between UEL and ICS for delivery of undergraduate programmes by distance learning.

The UEL/ICS partnership allows a blending of the core competencies of each organisation. UEL contributes the academic expertise and understanding of the requirements of offering higher education

qualifications, whilst ICS contributes its experience of a long history of marketing, developing and delivering distance learning.

The establishment of this partnership was crucial in order to achieve a rapid and viable entry to the distance learning market. There were benefits in several key areas:

- Programme development: 20 undergraduate programmes were designed, developed, validated and launched within a 24-month period. The timeframe for development was significantly shortened through the use of ICS development processes and commercial expertise. UEL academics contributed their expertise to the curriculum design, and retained the overall responsibility for quality assurance, but were not required to author the actual materials.

- Marketing/recruitment: the strength and reach of the ICS consumer marketing operation was probably the most significant benefit offered to UEL by this partnership. Without access to ICS's sophisticated marketing operation UEL could not have achieved the recruitment levels required to ensure the financial viability of this new strategic initiative.

- Learner support: ICS provides a streamlined and highly focused, non-academic, online support service to students using their team of mentors.

Following a recent review of the collaborative partnership, UEL and ICS have agreed to revise the roles and responsibilities of the partnership to ensure each partner is more fully focused on specific areas of organisational competence.

One major area of change has been the decision to focus ICS on delivering the academic and pastoral support of students solely on the first two open access modules of the programme. ICS have extensive expertise in supporting returners to learning, and providing the support and motivation which builds self-confidence in the unsure learner. UEL will focus on providing the academic and pastoral support to learners who have successfully completed the entry modules and who now aim to progress further through the degree programme. These students will

be better placed to benefit from the wider opportunities offered by being a university student.

Another key area of change relates to the flexibility of study pattern within a programme. Experience has indicated that distance learners benefit from a structured approach to guide them through their study: students learning in cohorts perform better than learners following their own personalised track. Establishing learner commitment to assessment dates at the beginning of their studies seems to provide more motivation when compared to learners being able to self-select their assessment point.

The initial development of all learning materials by ICS, in collaboration with UEL academics, enabled development of course content much more rapidly than would otherwise have been achievable. However, UEL has now completed the transfer of ownership of the IPR of all the materials to the university. UEL ownership of all content enables much closer academic engagement with the distance learning programmes than was previously the case. UEL expects to now manage curriculum change much more effectively, and achieve closer integration between on- and off-campus programmes, thus offering greater flexibility for all learners, with the choice of modes of study to meet a range of needs.

University of Edinburgh

The University of Edinburgh's e-learning activities enable it to expand access to postgraduate and continuing professional development programmes through market-leading e-distance courses, as well as enhancing the educational experience of campus-based students.

Edinburgh currently offers 24 online postgraduate programmes, plus continuing professional development (CPD) modules. All programmes are in professional areas (architecture, education, law, medicine and veterinary medicine) because this is where there is most demand. The programmes focus on up-to-date content with high-quality design and delivery. In medicine, for example, an innovative, award-winning programme uses virtual patients as the basis of discussions around 'cases'. The MSc in eLearning has developed novel assessments based on group work on blogs and wikis, tutorials in virtual

worlds and open co-construction of module content between students and tutors.

To achieve resilient and stable technology, Edinburgh uses the same systems for distance education as for e-learning on campus, but with additional systems such as video classrooms, social networking and virtual worlds.

Some of the programmes are collaborative – for example, in architecture with Heriot Watt University and in veterinary medicine with the Royal Zoological Society of Scotland. In medicine, the programme with the Royal College of Surgeons Edinburgh offers professional as well as academic qualifications.

Edinburgh recruits distance learners worldwide. An average of approaching 50 per cent are non-UK/EU. It does not target specific countries because it wishes to have a good mix of student origins and backgrounds.

The university is now planning a substantial expansion of online distance education provision, built on the basis of the expertise and experience gained over the past few years. The aim is to make distance education, where relevant, a normal part of the university's academic business. This will require applying lessons from other universities as well as learning from Edinburgh's own experiences.

The university regards its recent £4 million investment in e-learning to have been highly successful. It embraced 64 projects from across the university, each chosen for funding in open competition, followed by robust monitoring of outcomes. A number of lessons have been learned from the distance courses that have been funded:

- a need for strong pedagogical, organisational and technical support

- enhancement of market research and marketing capacity and alignment with that for on-campus provision

- central student services that recognise distance education as a core activity

- fully economic fees and appropriate student enrolments as part of excellent business cases.

University of Essex/Kaplan

The university has a long-standing commitment to widening participation and access to higher education, actively encourages and supports students from non-traditional routes and recognises the need to tailor modes of teaching and learning to provide effective support to all students.

Via a partnership with Kaplan Open Learning, the university offers online courses in the Home/EU market, which are flexible, accessible, provide practical work-based skills and can fit around work and family commitments that prevent students from attending traditionally delivered courses.

For the university's direct provision, blended learning is integrated across the curriculum, but with considerable variation between discipline areas. The university offers a few courses that are delivered online, particularly in professional areas.

The central e-learning support unit provides advice and guidance to departments and many incorporate elements of technology available into their courses.

Online courses with Kaplan Open Learning

Kaplan Open Learning's strengths include its culture of responsiveness to student and employer needs. Courses on offer have been developed and expanded, providing students with more choice and geared towards improving employability.

The Business Studies foundation degrees were the first to be validated in 2007, followed by courses in Criminal Justice and Financial Services, and honours progression routes. Certificates in Continuing Education have recently been validated to offer an interim award en route to a foundation degree and honours degree, and to provide students studying over an extended period with a feeling of achievement and motivation.

Kaplan Open Learning has adapted the successful model of delivery used by Kaplan in the US. There are multiple start points and opportunities to take study breaks. Each student is allocated a personal student adviser, who monitors progress and proactively identifies where students may need additional support. A variety of assessment methods are used, including online discussion forums and seminars, and tutors are available at times to fit around other

commitments. Courses are designed to maintain momentum and keep students engaged to aid retention.

The partnership reached a milestone in July 2010, when the first students to graduate with foundation and honours degrees attended Graduation at the university campus in Colchester.

The university is the awarding body for the Kaplan Open Learning courses and programmes are therefore validated and quality assured by the university. The partnership is managed by a University of Essex-Kaplan Open Learning Joint Academic Management Board, which monitors the quality and standard of courses and considers proposals for new developments. Procedures have been adapted to suit online delivery and the particular needs of the students, for example online meetings of the Board of Examiners are scheduled at more regular intervals, and the collaboration agreement with Kaplan Open Learning sets out clear requirements for the management and support of the online learning platform.

Other online learning activity

There are departments which offer courses or modules delivered entirely online. There are also courses or modules which incorporate elements of online technology to varying degrees, from use as a teaching tool to simply making materials available online.

Use of e-learning technology

The university's e-learning support unit offers advice to staff on how to use the range of learning technologies available, which include use of Moodle (a free web application that educators can use to create effective online learning sites), Questionmark Perception (a web-based application to produce online tests, assessment and surveys), ePortfolios, online submission of coursework and a course materials repository. There is guidance for supporting online learning and an e-learning network for staff to share information on projects, funding, conferences and other activities.

Examples of courses delivered online

One faculty with significant online provision is Health and Human Sciences, providing 100 per cent online courses and courses with a combination of some

modules delivered online and some face to face, particularly on professional courses. Postgraduate qualifications in Infection Control are delivered entirely online, with individual support provided by the course leader, specialist practitioners, an academic supervisor and a research supervisor.

The faculty offers a mentoring module (blended learning), paid for by health trusts, plus a mentorship update module which is available either face to face or online, and which ensures staff meet CPD requirements in order to remain on the register of mentors. Both are very successful.

In the faculty of Social Sciences, the department of Psychoanalytic Studies offers two foundation degrees in Therapeutic Communication and Therapeutic Organisations, which include two modules delivered online.

Future developments

The university has just launched an e-learning review to assess all technology-assisted learning activity and to share best practice and expand horizons.

Kaplan Open Learning continues to review the courses and subjects on offer, and is keen to extend its provision validated by the university.

University of Leicester

The University of Leicester has more than 20 years' experience of offering flexible, high-quality distance learning courses focused on students and their needs. Eighteen thousand students have graduated from its distance learning programmes and more than 8,000 are currently studying. The university encourages the formation of networks of students as a vital source of peer support.

Leicester is committed to learning innovation for distance learning and campus-based students. Its current Learning Innovation Strategy is based on the principles of:

- establishing evidence and evaluating the benefits of enabling innovation for student learning across the institution;

- collaboration across the institution within strategic frameworks and through funded research and development projects;

- raising the capability of all students and staff to exploit and benefit from learning technologies of the 21st Century, exploring 'beyond the obvious' to prepare for the future of learning and teaching.

The strategy is underpinned by sector-wide policies, informed by latest evidence for the deployment of learning technology and by current and future learners' expectations and needs. It leads on approaches to developing institution-wide capabilities and capacities for learning design and delivery, and promotes institution-wide engagement and collaboration. It offers a framework that develops and extends the range of services and approaches already in place, and also helps to deepen understanding and deployment of learning technologies throughout the university so that departments can make informed choices.

The strategy is implemented through engagement with staff and students in 'media zoos'. These were developed to communicate the university's first e-learning strategy to staff. They provide ongoing opportunities to experiment and hear about research evidence that might impact on teaching. The staff media zoo has four modes – virtual worlds, web and creative physical space and mobile zoo. There is also a media zoo for graduate students in the main library. The web-based media zoo and all research projects can be found at: www.le.ac.uk/mediazoo.

Research projects associated with the media zoos include better use of the virtual learning environment (VLE) through curriculum redesign and development; podcasting for pedagogical purposes; projects for student and staff engagement; e book readers for distance learning; use of virtual worlds; development of open educational resources (OERs); and knowledge transfer within the sector and to other educational sectors. The media zoos underpin high-level dissemination of 'research to practice, innovation to mainstream' at the university and throughout the sector.

Evaluation takes into account a range of factors including:

- evidence for improvements in the students' learning experience;

- evidence for retention of students throughout;

- evidence for improved achievement;

- saving of academic time, costs and resources;

- modernising of learning pedagogy;

- use of low-cost, high-value technologies in purposeful ways;

- recognition of learning innovation in the sector and throughout the world;

- benchmarking and worldwide positioning.

The university has identified a number of benefits and lessons to be learnt from its experience. The main ones include the importance of basing the innovation strategy on university strengths relevant in the current market and the need to drive change from researched evidence of impact on staff time and student learning. It is important to focus on adapting and deploying existing technologies for learning use. This can be done either by using the VLE better, to enhance return on investment, or adapting for pedagogical use technologies developed for leisure entertainment, networking or communication. Examples of these technologies are web 2.0 applications, e-book readers, podcasting and mobile devices such as smartphones and tablet computers.

Leicester has found it is rarely necessary to develop further new software or platforms in the current technological environment. Instead effort should be put into learning design, research and evaluation of pedagogical outcomes, using low-cost, high learning value approaches. Experience at the university also highlights the importance of ensuring that successful pedagogical experiments have a route to become mainstream, normal and embedded in practice, such as designing for OERs.

University of Liverpool/Laureate

The University of Liverpool launched its first wholly internet-based programme (an MSc in IT) in April 2000. Today there are 20 online programmes, with over 6,000 students registered from over 150 countries. Delivered in partnership with Laureate Online Education, the programmes are targeted at working professionals in the disciplines of IT, management, health, law and psychology. The first research degree, a Doctorate in Business Administration, was launched in the autumn of 2010.

The pedagogical approach of the programmes ensures that students continuously engage on specific tasks and interact with their peers and teachers. Many students are in full-time employment and are keen to support and collaborate with their colleagues. They bring to the virtual classroom a wide range of experience and multicultural perspectives. Students work together in an asynchronous manner, encouraged by instructors through moderated discussion as part of the seminar structure.

Seminars rather than lectures are pre-eminent, in contrast to traditional on-campus teaching. Held once a week, seminars generally consist of discussion questions and debate between students and the instructor, focused on particular themes. They are supported by textbook and journal readings, and a range of other written text or audio-visual materials. Equally important is the rapid response by instructors to grade assessments and provision of student feedback within one week, monitoring and encouraging student progress.

This continuous interaction between student and instructor provides authenticity to the learning process. Experience and knowledge are shared, while the prescription of a rigorous grading criteria helps to verify student identity. The guaranteed involvement of students overcomes isolation and alienation, which are often experienced in distance learning programmes. With high levels of student support, the university is able to identify the points when students encounter problems. Individual student characteristics emerge as they learn, while the use of tools such as plagiarism detection software supports academic honesty across the programme.

The university has received many positive comments from external examiners about the programmes and the learning experience has often exceeded expectations of students and aided career development. This has helped to overcome the prejudice and preconceptions about online learning – particularly that it can be impersonal and alienating, linked to misleading notions of bulk processing, low costs and therefore low standards. With a very high student-staff ratio, costs tend to be about the same as on-campus programmes.

In recent years, external accreditation agencies have acknowledged online programme standards. They have also witnessed the experience of students who have shown how online learning can actually be more intellectually stimulating than many traditional lecture-based programmes. The MBA programme received the European Foundation for Management Development technology enhanced status, while most recently the MSc Operations and Supply Chain Management programme was accredited by the Chartered Institute of Purchasing and Supply. The university anticipates further development in the accreditation of online programmes as best practice is shared among providers.

The partnership with Laureate is considered to be important strategically and brings together two organisations with different cultures. Clear demarcation of roles overcomes any ambiguity about where responsibilities lie. The university has final control over all academic matters. All on-campus structures and standards are replicated and standard procedures for each programme ensure all QAA guidelines are adhered to strictly. One of the main objectives of the partnership has been met: comparability of quality and of esteem between online and on-campus programmes.

University of London International Programmes

Established in 1858, the University of London International Programmes (formerly the External System) exists to promote worldwide a programme of degrees and other awards, primarily for students who cannot attend full-time courses at the university. It operates under the principle, enshrined in university statutes, that the academic standard of University of London awards is attained irrespective of mode or place of study. All programmes offered by the International Programmes lead to awards of the University of London, the degree-awarding authority.

Twelve of the university's 19 colleges offer distance learning provision through International Programmes, some also externally. There are currently approximately 50,000 students, 88 per cent of whom are from overseas from 198 different countries and 12 per cent from UK. The most important relationship is with the London School of

Economics, with 19,500 students registered for University of London degrees through International Programmes. Recruitment focuses on courses related to financial and legal professions, although there are also degrees in humanities, medicine, languages, philosophy, sociology, tropical medicine, primary health care and international development.

The International Programmes operates through a partnership between the central university and the member colleges. Programmes of study are each academically managed by one or more colleges. The central university is the registering and awarding body, providing the overarching governance, and administrative and development support. Colleges are responsible for the academic development, maintenance and review of programmes and for students' progression through those programmes.

Although the majority of courses are designed so that they can be completed through independent study alone, around 70 per cent of students voluntarily attend local independent teaching institutions to gain additional academic guidance. Provisional recognition has been granted to 72 such institutions.

The Centre for Distance Education (www.cde.london.ac.uk) is a new initiative to support the development of expertise in distance learning at college level. The centre comprises a network of educational practitioners, researchers, experts and specialists. It supports a community of practice and provides a focus for the development of high-quality teaching and research in distance education throughout the federal university. The centre's overall purpose is to enhance the student experience and improve achievement through distance learning. It promotes excellence in teaching and research and enhances the status of distance learning in higher education. The centre also aims to foster innovations, both pedagogic and technological, within distance education, evaluate their reception by students and facilitate dissemination of best practice within the community of London colleges.

In addition to the work of the Centre for Distance Education, the university is implementing a £12 million project to improve administrative support for the student lifecycle and provide enhanced learning materials including an online library. International Programmes has two out-posted staff from the

university library who work with staff and students to ensure optimal take-up of the new resources.

The marketing strategy is led by the Global Networks and Communities Directorate, a major part of whose role is to support the development of capacity in independent teaching institutions around the world, because these organisations play a key role in bringing students to the university. The Global Networks and Communities Directorate also looks to recruit independent students and recognises that some of the degrees offered by International Programmes are supported with VLE-based teaching supplied directly by a college of the university. These needs are served by the production of materials and also generic marketing through the web, educational affairs and media events.

London School of Hygiene and Tropical Medicine

A postgraduate college, the London School of Hygiene and Tropical Medicine (LSHTM) launched its first distance learning courses in 1998. Today, 2,700 students around the world are enrolled on the courses, which cover critical aspects of international public health and tropical medicine. Their numbers have grown significantly, increasing by 40 per cent over three years.

All distance learning students are part-time, with the vast majority also being in full-time employment. Many come from low- and middle-income countries or work in international development, so particular attention has been given to developing appropriate course design and content.

Responsibility for distance learning courses is shared with the University of London International Programmes (formerly known as the External System). LSHTM sets, delivers and monitors the academic content and integrity of the courses. International Programmes manages specific administrative functions such as student admissions, dispatch of study materials, and coordination of examination arrangements.

Distance learning courses are designed as self-study opportunities with a strong link to the face-to-face teaching programme in aspects such as content, assessment and staffing. Students receive academic

tutoring and assessment feedback from subject tutors, usually via email and the use of web-based conference systems. Networking and mutual support with others studying on the programme is encouraged and in some countries is facilitated by LSHTM staff and local research collaborators.

With students based around the world, a significant proportion have limited access to high-quality internet connections (e.g. on some courses over a third of students are from sub-Saharan African countries) so the extent of online learning varies. At one extreme it consists primarily of the use of virtual learning environments for student-student and student-tutor interaction but with most content delivered in other formats. At the other, content delivery is primarily internet-based, supported by some additional textbooks and reading materials.

Assessment is via written assignments of various types together with unseen written examination papers taken at one of an extensive network of University of London approved centres around the world (e.g. universities, British Council offices).

The school is making increasing use of its distance learning materials in other settings, including online materials, for example under free licence to institutions in South Africa and India to adapt for local courses. It has also recently participated in a JISC-funded open educational resources project, using online material on malaria as a pilot resource.

Newcastle College

The Newcastle College Group is a £175 million organisation, which brings together over 40,000 learners and over 3,800 staff across four divisions at over 100 sites, to form one of the largest educational, training and employability organisations in the UK. The School of Creative Industries is a new school formed by the merger of the Performance Academy and the School of Art and Design.

In devising a new foundation degree programme in Creative and Cultural Industries, the college formed a working group with employers and representatives of the cultural sector to develop the mode of delivery. Employers wanted to ensure they could support employees to enrol without adversely affecting the operation of their businesses. For the college, the

challenge was to devise a programme that was truly work-based whilst delivering new skills and giving learners adequate academic and practical support to feel part of the community.

The blended model of delivery was chosen to give most flexibility. The outcomes of each module are principally delivered through the college's virtual learning environment, Blackboard, making use of podcasts and other interactive media for learners. The college invested in web conferencing technology to allow students to interact with academic staff via webcam.

With a curriculum designed to meet the needs of the industry, delivered via an online learning platform, the college considers the foundation degree in Creative and Cultural Industries to be an example of best practice in the sector.

Nottingham Trent University

At Nottingham Trent University (NTU), we see e-learning not as a separate activity but as a feature of how we learn in the 21st Century. It was important to us to embed online learning throughout the University. We want to help students to benefit from excellent open access materials from across the world; and, increasingly, to make our own teaching materials and lectures available electronically. We believe that online learning will progressively break down the distinctions between full-time and part-time study, between on-campus and off-campus students; this will help us not only to broaden the NTU university community but also to build and strengthen our lifetime engagement with alumni.

Our approach was both top-down and bottom-up. Before embarking on the change programme, we considered who would resist change and their motivations for resistance. We recognised that some staff would resist the move to online learning because they lacked confidence with the new technology and, from the outset, we trained staff to overcome this hurdle.

The top-down drive was led by the Vice-Chancellor, Professor Neil T Gorman, who had led the massive change programme at NTU that had transformed most aspects of the university's work – including teaching, research, estate and IT infrastructure - and by the then Director of Libraries and Knowledge Resources,

Professor Sue McKnight. Professor McKnight had been recruited from Australia which had long ago embraced e-learning and she was known for her determined approach to change in learning resources.

The bottom-up drive came from the enthusiasm and ingenuity of committed academics and developers.

One of the first early projects was the Institutional Repository which encouraged staff to showcase their work to the world. The next university-wide project – the move from the in-house virtual learning portal (VLP) to the new VLE was a major initiative which initially attracted strong opposition. Many staff were anxious about the abandonment of the in-house VLP with which they were familiar and comfortable. They were also concerned that the transition to the new VLE would result in additional work. There was a strong effort on communication and training and the Desire to Learn VLE – now known as Nottingham Trent University Online Workspace (NOW) – went live in September 2008.

The benefits of NOW proved to be numerous. Academics took the opportunity to create teaching materials from scratch rather than transferring old material from the VLP. New tools were introduced – e.g. the Learning Object Repository where academics can share content, and the e-Portfolio where staff and students can store materials which showcase what they have achieved. The VLE consultative process built an e-learning community across the University. A Technical Information Literacy Induction (basic IT and VLE use) is now provided as part of the new student induction, and the university has provided e-learning secondments for staff.

An important aspect of NTU's strategic approach is that the university has set and enforced minimum standards for the online learning that it expects Schools to provide. An e-learning benchmark audit took place in 2006-07. This was the Pathfinder Project, and the follow-up audit took place in 2010.

In 2009, the Vice-Chancellor set the Schools a challenge and set the pace for change. Within a year, each School should showcase their online learning to him. Deans were supported in their preparations by the Learning and Teaching Coordinators, and staff took pride in presenting the latest developments to the Vice-Chancellor.

The change programme was supported by initiatives that encouraged senior managers to gain hands-on familiarity with the technology – e.g. the systems that supported the E-learning Steering Group were all web-based.

The Vice-Chancellor made presentations directly to many different staff groups about the importance of online learning, including deans, professors and academic team leaders.

2010-11 will see a number of major online learning initiatives across NTU including development of a university-wide system to facilitate e-assessment.

From our experience, we are convinced that online learning will drive up quality in every aspect of learning and teaching and enrich the experience of all students.

The Open University

The Open University (OU) has been a pioneer in higher education for more than four decades to ensure that neither distance nor academic background is a barrier to learning. As Britain's only specialist, dedicated distance learning provider, the university has delivered learning through a rich mixture of media bringing scalable, flexible, high-quality learning to its 250,000-plus students.

The OU has developed its own style of online learning called 'supported open learning' giving its students flexibility to study when and where suits them best. This is in keeping with the university's founding mission to be open to people, places, methods and ideas.

Supported open learning means OU students have:

- support from a tutor or online forum to help with module material, activities and assignments

- student advisers and study facilities in their own region, and

- contact with other students at tutorials, day schools or through online conferencing, online social networks and informal study groups.

The university has focused on developing pedagogy to enable the widest range of learners studying from their homes and workplaces.

Increasingly learners are accessing their learning through mobile technology and the university enables learning on smartphones and tablet computers. The culture of innovation is institution-wide with the Knowledge Media Institute providing a focus for research and development and the Institute of Educational Technology having a role in pedagogic support and staff development. The use of technology is built into the course development process from the outset with learning materials produced by interdisciplinary teams.

The OU virtual learning environment is integrated with student records and systems for curriculum design and e-assessment. About 500,000 assignments were submitted online in 2009, resulting in more rapid and flexible feedback to students on their progress.

The university's systems help students to link to each other online and get the right syllabus, content and assessments. At the heart of the virtual learning environment is Moodle, the leading open source learning management system. The OU has enhanced the system considerably and fed improvements back to the Moodle community.

The OU now has 164,000 active users of Moodle and is receiving hits from as many as 50,000 separate individuals every day. It has 545 active module sites which is almost all of our courses. The OU's website generates 50 million page impressions a month with content spread across 2,000-plus websites.

The university's customer relationship management system (known as VOICE), using Siebel technology, is critical for compiling a comprehensive record of a student's contact with the OU. The system handles one million service requests per year.

The OU is also harnessing the reach and power of the web and of social networks to bring learning opportunities to millions more people internationally. Open University iTunes U has had more than 25 million downloads and the OU View area of YouTube.edu has attracted over 3 million views.

The university hosts a dedicated website, OpenLearn, offering free and open access to OU course materials. The site, which has received 14 million visits, delivers over 8,000 hours of study materials in 12 subject areas from access- to postgraduate-level courses.

These online tools and environments developed by the OU are powering major international development

programmes in some of the poorest nations. Examples include the TESSA teacher education programme which is helping nations in sub-Saharan Africa deliver both teacher training and curriculum materials to improve opportunities for young people and contribute to wealth creation. Over 300,000 teachers have enrolled on the programme which was awarded a Queen's Anniversary Prize for Further and Higher Education in 2009.

This technology is also used in the HEAT health education programme which currently has a $4 million UNICEF grant to educate more than 30,000 rural health workers in Ethiopia.

Walsall College

Walsall College is using online learning to increase its market share for international students, by offering them HE courses in their home countries. Initial development work was done with partners at Leningradskaya College in Russia. Hospitality courses were aimed specifically at Russian students who will be working at the Winter Olympics in Soshi in 2012. Students are registered as Walsall College students and supported over two study blocks per year, utilising a Moodle open source environment. More recently a cohort of students from RosNou (New University Russia) have been studying a Higher National course in Hospitality Management (Tourism). These students are also registered as Walsall College students and able to study the same course as UK-based counterparts by using the online environment. All the course materials are made available, assignments are electronically submitted and practical work is supervised and recorded by RosNou tutors.

The college is also increasing the market for work-based learners, recognising that smaller companies find it particularly difficult to find time for staff to be released to study. The challenge for the college is to offer cost-effective, flexible access to higher-level courses, at disparate locations and usually in a modular form. Online learning allows it to reach many more companies and individuals more cost-effectively. Working with a number of motor vehicle engineering and repair companies and a commercial development partner, a bespoke e-learning environment has been established that allows remote access to all the course

materials at all levels. Through this environment, students and their employers are supported, assignments can be downloaded and submitted, and tutors can interact with students who are able to communicate with others in different locations.

Annex 4

Research findings

A.   Study of UK Online Learning

Technology-Assisted Lifelong Learning at the University of Oxford provided an overview of the current UK provision of higher education-level online distance learning (ODL)[29] . The aims of the study were to:

*   Provide an overview of the current UK offer of online and distance HE courses to undergraduates, postgraduates and professionals (including CPD) – noting key players and models of provision.

*   Illustrate this overview with a number of case studies (to understand the financial value and student numbers involved).

*   Provide details regarding common barriers to, and motivations for, the growth of HE online and distance learning in the UK, and where possible to suggest where and how these barriers can be overcome and these motivations better supported.

*   Advise the Online Learning Task Force where further work is required to provide a fuller understanding of online learning.

The study was undertaken over a short timeframe of 30 days between mid-December 2009 and the end of February 2010. A combination of desk research, a survey and interviews with key institutions ensured sufficient data was gathered to provide an overview of the scale of provision of online and distance learning within the UK. The work also provided an opportunity for further investigation of institutional motivations and barriers to success of expanding such provision. However, the study was not able to determine the financial success of the UK's current ODL provision, for which more work would be needed.

The research demonstrated that there appears to be significant activity in the UK HE and FE sector developing and delivering ODL programmes, with many institutions keen to expand their offerings in this area. With targeted support from HEFCE, and other relevant agencies and institutions, the UK will be in a strong position to sustain its excellence and grow its market share of ODL provision in coming years.

Summary of research outcomes and recommendations

The Study of UK Online Learning reported a series of research outcomes and recommendations to the Task Force.

Improve 'discoverability': Identifying online distance learning courses on the web can be a challenge for students as they are often 'hidden' in complex institutional websites. Where details are available, they frequently fail to provide the full range of information a potential online student needs to decide whether a course meets their requirements. Institutions need support to improve their websites to mirror the searching methods of potential students and provide more relevant information on course offerings. There is a need also to optimise the international visibility of UK ODL activities in major search engines such as Google.

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

Accurate data: A taxonomy of ODL courses is required to give an accurate picture of the wide range of student experiences that currently exists under that broad heading. Further work is also needed to collect comprehensive data about ODL provision in the UK. Existing data collection exercises, such as Higher Education Statistics Agency returns and other nationwide systems, such as the National Student Survey, need to be reviewed to ensure that future data

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[29] 'Study of UK Online Learning: Report to HEFCE by the Department for Continuing Education, University of Oxford', (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

collection provides an accurate, detailed overview for informed decision-making.

Market intelligence: While some institutions have a good understanding of the aspirations of their ODL students, more market intelligence would benefit the whole sector. The vocational trend in ODL provision creates a feasible framework for gathering market intelligence, especially for those courses offered at postgraduate level. Better market intelligence is also needed to identify which aspects of online learning need targeted support.

B. Understanding the demands and perceptions of students

The Task Force placed great emphasis on understanding the needs of students to ensure online learning provides the best value for them. It strongly believes that students should be regarded as partners in the development of online learning rather than mere recipients. A key aspect of its work was to investigate current perceptions in UK higher education institutions and the level of demand from new and potential students. The National Union of Students was commissioned to undertake research, as part of which it organised focus groups and discussions.

The NUS study[30] reported a number of key findings about provision ICT. These were based on a range of views from students with differing experiences of and exposure to online learning and technology:

* ICT provision can vary widely from institution to institution. This was a recurring theme in discussions.

* Individual experiences and expectations of ICT also vary widely.

* Lecturers and staff have widely varying levels of ICT competence (for example, using Blackboard creatively) which can lead to differences in how well students engage. Some are clearly skilled or at least able to function in the use of ICT. Others lack even the most rudimentary ICT skills.

* At present, most students are self-taught in ICT skills. The majority have learned to use computers in their own time.

* Often they acquire information in a more cursory and less detailed fashion using ICT, and lack skills to make the best use of such sources.

* Opinions are divided over the relative merits of e-learning. Some fear that it will undermine the quality of teaching, the amount of information available and the social benefits of a physical classroom or lecture hall experience. Others, however, argue that e-learning has many advantages, not least convenience for full- and part-time workers and those with family and other responsibilities.

* Students prefer a choice about how they learn. They are most responsive to a range of possible learning methods rather than one or two prescribed options.

* Virtual Learning Environments can sometimes be poorly run, and with some staff not always well trained in their use.

* Students believe that ICT is not a 'cost-saver' but brings other benefits such as added convenience, interactivity and ease of access.

* Some students feel they lack information about correct research and referencing skills.

The NUS report makes the following recommendations:

* Institutional responses to ICT: all institutions should have an ICT strategy that is revised every three years and fully engages students in the process.

* Institutional organisation and planning: university faculties should appoint senior fellows responsible for new technologies and supporting integration into teaching and learning.

* Institutional funding strategies: faculties should have innovation funds to support academics develop new ways of using ICT.

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[30] 'Student perspectives on technology – demand, perceptions and training needs: Report to HEFCE by NUS' (October 2010), available at www.hefce.ac.uk under Publications/Research & evaluation.

- Development of new courses and modules: The use of ICT should be embedded into the design of new programmes through the validation process.

- Periodic Reviews should assess the extent to which VLE and ICT are used to enhance learning.

- Institutions should review the use of their VLE to identify and share good practice in enhancing the student learning experience.

- Institutions should consider ways of making university administration more accessible through technology including e-submission of assessment, registration and course choices.

- Student training needs and provision: all students should be offered training needs analyses of their ICT skills at the start of their programme to identify their training requirements.

- Module and course validations: the course evaluation form should question the extent to which tutors have integrated ICT into courses.

- ICT and career development requirements: ICT skills should at least be integrated into the Professional Standards Framework[31], institutional promotional criteria and selection for teaching awards.

C. Understanding the needs of future students

The type and nature of online learning taking place within primary and secondary schools was investigated in order to improve understanding of what future HE students may expect.

A study by Becta[32] into online learning in schools and FE colleges found that online learning in schools is mostly used to supplement classroom teaching, for example through specific homework and revision sites. There has been significant recent growth in the adoption of learning platforms (virtual learning environments and managed learning environments) in primary and secondary schools. In 2005-6, 46 per cent of secondary schools had adopted a VLE and this rose to 93 per cent in 2009-10.

School platforms are varied, supporting diverse approaches to learning, and their use is developing. The market is fragmented, with no dominant provider. Technology is used increasingly to support creative and collaborative learning. However, the skills, experience and capability of pupils are mixed, with some thinking they do not get enough opportunity to learn online. Not all schools do the basics, or do them consistently. This may reflect teacher skill gaps in the use of technology, or poor general capability in 20-30 per cent of schools.

Becta found online learning is a priority for many schools, particularly secondary schools, to extend learning beyond the classroom and to provide remote study access for all learners.

Among FE and sixth form colleges, 98 per cent operate a virtual learning environment (VLEs and MLEs), and these are less diverse than those of schools. A significant proportion of college practitioners do not make routine use of technology in learning and teaching.

Digital resources are more likely to be used in FE for teaching in the classroom rather than by students accessing learning remotely. As with schools, though, there are gaps in the confidence and competence of practitioners, which impact on the student experience. Student experience is also highly dependent on the particular college. Trends in capability are good in the college sector, although a significant proportion of college practitioners do not yet make routine use of technology in learning and teaching.

D. Learning from international experience

The Task Force considered a paper on international experience and business models, highlighting ventures where the online element was predominant, as distinct from broader forms of distance education. The paper made a range of assessments of major operators that are currently successful:

- There are many indications that the international market for online learning is growing rapidly, although it is difficult to define the market or estimate its size or potential.

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[31] The UK Professional Standards Framework is owned by the sector and enables institutions to demonstrate that professional standards for teaching and supporting learning are being met.

[32] Becta presentation to OLTF 'Online learning in schools and FE colleges' (2010).

- There are many models for online provision. The market may be large and diverse enough to accommodate different types of operation and provider.

- Regardless of the model adopted, providers tend to operate in niche markets and do not compete with traditional universities across the full range of academic disciplines and levels.

- Since initial and continuing investments can be substantial, operations must reach a sufficient scale to cover these costs. This may take time, so providers need realism, patience and sufficient financial resources.

- Private for-profit providers have been the most conspicuously successful to date. Some of them are already clearly profitable. This seems to be because they operate on a large scale and experience no internal conflict with an existing non-profit culture. The size and profitability of these operations give them a strong competitive advantage.

- There is a basic question about whether online provision should or can generate additional revenues from existing campus-based students, or whether it should aim at reducing unit costs in large-scale operations.

- Adequate costing information is essential to inform business decisions.

E. Business lessons from unsuccessful online ventures

A further paper continued the investigation by exploring online ventures that have either failed (in the sense of having ceased to operate) or have significantly under-performed against original expectations. The main focus was on lessons for current and future providers.

The discussion explored six high-profile case studies, mainly from the last decade:

- Cardean University

- Fathom

- the UK e-University ('UKeU')

- AllLearn

- U21Global

- the University of Illinois Global Campus ('Global Campus').

These examples represent a variety of models for delivering online HE. Most have involved at least one UK HEI and many began during the dotcom boom.

In drawing conclusions, it was acknowledged that interpretations can be disputed and it is important to be wary of generalising about particular models. Nevertheless, all the examples failed because they attracted too few students.

Factors to minimise the risk were identified:

- Clarify the purpose: institutions need to know what they hope to achieve from online learning ventures.

- Have a viable business model: there are many ways to deliver online education successfully. Institutions can learn from others' experience but the model they choose must reflect their own organisational arrangements, culture and values.

- Understand the market and what students want: from the outset there needs to be clarity about the markets in which the venture will operate.

- Invest in a robust business plan: initial investments can be substantial, programme lead times lengthy, and enrolments slow to build up. There needs to be a realistic assessment of break-even points and the factors that might prevent their attainment. All the elements should be kept under review and updated when necessary.

- Acknowledge and address cultural issues: some ventures failed because they did not sit easily within the existing organisational culture.

- Build on existing success: starting something entirely new is high-risk. Institutions will often do better by building on existing success in distance education and e-learning, or by forming partnerships with organisations that can provide such expertise.

- Learn from others: institutions can learn from others' successes and failures in areas such as choice of business model, use of technology, pedagogy and quality assurance, proven markets and realistic timescales.

- Ensure leadership and ownership: online learning should be seen as a strategic opportunity or priority, requiring leadership from the top.
- Invest for the long term: a large investment gain from a quick sell-off is unlikely. It is essential to review progress regularly and adjust activities accordingly.

F.   'What next for online learning?' seminar

More than 100 delegates attended a seminar, 'What next for online learning?' at the British Library on 25 June 2010.

Presentations were given by Dame Lynne Brindley (Chief Executive of the British Library and Chair of the OLTF), Stuart Hamilton (Chief Executive Officer at Open Universities Australia), Roxanne Stockwell (Group Innovation Director at BPP) and Martin Bean (Vice-Chancellor, Open University).

The seminar confirmed that the Task Force is considering the correct areas, and that these are relevant and important to the sector. Delegates agreed with the need to emphasise the following key points:

- re-affirming the importance of engagement of academic staff and staff development – not assuming that they are unwilling to learn or develop
- further consideration of shared services as a mechanism for improving collaboration and reducing costs
- highlighting that online learning should not be driven by technology.

List of abbreviations

AOC   Association of Colleges

FE   Further education

HE   Higher education

HEA   Higher Education Academy

HEFCE   Higher Education Funding Council for England

ICS   International Correspondence Schools

JISC   Joint Information Systems Committee

NUS   National Union of Students

ODL   Online distance learning

UCAS   Universities and Colleges Admissions Service

UKTI   UK Trade and Investment

UUK   Universities UK

VLE   Virtual learning environment