

Implications for Brazil of lessons learned from distance learning providers in other countries

by Professor Paul Bacsich

Abstract

This paper will focus on:

1. Exemplars from round the world (what works, what does not)
2. Lessons to be learned from “mega universities” and meso-level projects
3. Understanding the state of play of e-learning in universities: Benchmarking
4. Ensuring change in universities: Academic Transformation
5. Tentative recommendations for Brazil.

The main paper is followed by four Appendices going into more detail.

1. Exemplars

Disclaimer

Note that since other speakers are covering these topics I shall not talk at all about:

- Brazil
- Other parts of South America
- United States

We start with the so-called Megaprojects.

Within the UK

UK successes at this level are three in number:

- UK Open University
- London University External Programme
- University for Industry (LearnDirect)

Outside the UK

Outside the UK other successes include:

- Open University of Catalonia (UOC)
- Swiss Virtual Campus (consortium)
- Athabasca University
- FernUniversität and other traditional DL providers in EADTU

Beyond Europe the exemplars include:

- The Malaysian DTUs (e.g. UNITAR)
- Thailand (e.g. RAM)
- China (e.g. Tsinghua)

There are of course several big successes in US – Phoenix, UMUC in particular, and many medium-sized exemplars – such as Capella.

Failures

But more interesting are the *failures* among megaprojects:

- UKeU (UK eUniversity)
- Scottish Knowledge and then Interactive University
- TechBC (Canada)

There are also several failures in US including Fathom and Cardean.

Not complete success or failure

But as so often the ones of most interest are those which do not quite fail but do not quite succeed either

- the Dutch Open University has managed more than once to avoid closure or merger – most recently the idea was to subsume it into the Dutch Digital University consortium, but this has now closed.
- the Open Learning Agency (Canada) is being downsized and moved from Vancouver upstate to the new dual-mode Thompson Rivers University, based in Kamloops – time will tell how successful this is
- the Finnish Virtual University has been active for some years but does not seem to have transformed the Finnish university set-up.

2. Lessons to be learned

So what lessons can other countries learn from these tales of woe among the relatively few successes?

At a helicopter level I would say that there are three:

1. Be very cautious about new-build opportunities: “keep off green fields”
2. Also be very cautious about unstructured unpurposeful investment in the traditional university sector
3. Be quite cautious on consortia

At a detailed level the next section goes into this issue.

Critical Success Factors

I suggest based on my researches (see in particular Appendix A), there are ten which are the most important:

1. Brand management
2. Good market research, *coupled with* a willingness to act on it
3. Time to market: keep it short
4. Cost of marketing: keep it low
5. Realism about differentiators: vital *quality* is not a differentiator; *price* is; VLE functionality is *not*; open source is *not* (sad to say, perhaps)
6. Hybrid managers (“corporate university”)
7. Talented staff *and* rapid staff development
8. Collaboration management (of partners)
9. Cost management
10. Realism about languages especially about English for specialist high-level studies.

Critical Success Factors: what’s next

The list of 10 Critical Success Factors above is being extended by work under the Re.ViCa project and arising from the changes in the UK. See Appendix B.

The aim is to come up with a longer list oriented to “step change”, both in “mega universities” and in traditional universities in the meso-level context of “academic transformation” of programmes of study.

There is also work going on under the auspices of Becta but no details are being made public at present.

Much of the focus in Re.ViCa is to extend earlier UNESCO and UKeU work on producing a gazetteer of e-universities and produce a more structured taxonomy. Particular attention is being paid to the so-called *Major E-Learning Initiatives* (MELIs). A MELI is defined as follows:

1. It requires at least one per cent of the institutional budget.
2. It affects or is planned to affect at least 10% of students.
3. The person responsible (as the majority proportion of his/her job) for leading that initiative has a rank and salary at least equivalent to that of a university full professor at Head of Department level, or equivalent rank of administrative or technical staff (usually an Assistant Director) – and ideally that of Dean or full Director.
4. There is a specific department to manage and deliver the initiative with a degree of autonomy from mainstream IT, library, pedagogic or quality structures.
5. Progress of the initiative is overseen by a Steering Group chaired by one of the most senior managers in the institution.
6. The initiative is part of the institution's business plan and is not totally dependent on any particular externally funded project.
7. There are strategy, planning and operational documents defining the initiative (including its costs and benefits) and regularly updated.
8. The head of the institution (Vice-Chancellor, Rector, President, etc) will from time to time in senior management meetings be notified of progress and problems with the initiative.
9. The head of the institution is able to discuss the initiative in general terms with equivalent heads of other institutions – in the way that he/she would be able to discuss a new library, laboratory or similar large-scale development.

3. Benchmarking

Like Activity Based Costing, Business Process Re-engineering, Quality Enhancement, etc, the term has been around for many years.

But many are not sure what it means!

Benchmarking: definition

Benchmarking was defined by Xerox as:

A process of self-evaluation and self-improvement through the *systematic* and collaborative comparison of *practice* [process] and *performance* [metrics, KPIs] with competitors [or *comparators*]

in order to identify own *strengths and weaknesses*,
and *learn* how to adapt and improve
as conditions change.

Benchmarking: results

In the last two years, over half of the 120 English universities – in fact around 65 – have been benchmarked for e-learning. A much better picture is now available of the capabilities of the university sector.

There is similar work in New Zealand. More is starting up, e.g. in Wales and Australia.

But once an institution has benchmarked its capability, what does it do next? This is where academic transformation comes in.

4. Academic transformation

Academic transformation is hard for universities, in all countries of the world with the possible partial exception of the US.

- Universities are reluctant to change what and how they teach, even when demographic and business pressures are strong, and even when new markets emerge
- Many patterns of incentives have been tried in many countries, but at best lead to incremental change, usually with increased costs.

Academic transformation: solution

There is a model of Academic Transformation first trialled in the US which has been used in various ways in Scotland and England. This is the model of Carol Twigg at NCAT, developed under Pew funding.

There are other potential models including, in the past, Business Process Re-engineering and MIT90s. We discuss these first.

Business Process Re-engineering has many critics in industry and academia and has rarely been applied in universities. This is perhaps a pity but a reality, so we do not discuss it further.

MIT90s

MIT90s is a softer and perhaps more theoretically sound model. It was first developed in the early 1990s by a group at MIT, and then applied to IT-induced transformation of US corporates.

It was later applied to the education sector: in UK and Australia especially.

The key notions are:

- Categories under which an institution can be analysed
- Trajectories of change between these categories
- Transformation levels, representing the “depth” of change.

The model is described in more detail in Appendix C.

It has provided a useful contextual scheme for benchmarking (piloted by the University of Strathclyde in Scotland) and a gentler framework for academic transformation.

Transformation and Pathfinder

The six Scottish Transformation Projects have just concluded, at a cost of £6 million.

The 37 English Pathfinder projects are still finishing their work, at a cost of £8 million.

No official reports are yet available, yet some unofficial conclusions can be drawn and one research paper has just been published comparing these. The abstract notes:

The scale of these two programmes is comparable to the Pew Grant programme in course redesign in USA higher education, which claimed both improved learning and reduced costs through the introduction of technology enhancements. This paper considers how these claims influenced the UK initiatives, and how divergent strategic considerations led the national programmes to be defined differently. A conclusion is that the way the initiatives were framed has influenced their outcomes. However, both programmes have succeeded in building a cross-institutional level of capacity development that offers a policy direction for the future.

Some conclusions can also be drawn from the relative success of the Swiss Virtual Campus, the less successful Finnish Virtual University, and the failed Dutch Digital University.

Few other European countries have funded such projects.

- France set up the Campus Numeriques, but not much is known to English analysts.
- Italy has set up a network of Telematic Universities in 2003 – but progress seems slow.
- Germany has the Bavarian Virtual University but this is not very successful.

There are also some EU-level projects on Virtual Campuses (funded under the Lifelong Learning Programme) including in teacher training.

Other initiatives in England

Many English universities (Leicester etc) have developed Distance Learning programmes – but many are still not very “e-enabled”.

Several (Derby, Middlesex, Staffordshire etc) have developed a Virtual Campus style of operation to deliver e-learning both for DL and for Work Based Learning (WBL) oriented to employers.

But most of these initiatives seem to stall at a certain level – often around 1000 students – and cannot grow beyond that. This has been called the “second stage ignition problem”.

Lack of clear government support for distance learning is a problem.

Increasingly, at least in England for higher education, government support for e-learning is implicit, not explicit. This makes it hard for universities to develop viable policy. (The situation is slightly different in Wales and in Scotland, and very different for the college sector in England.)

5. Top-level and tentative proposals from an outsider

1. A clear and convincing market research study is needed to demonstrate what new markets are available to universities in Brazil and what old markets may be declining. (Has this been done?)
2. University capability to deliver e-learning by Distance Learning and other means needs to be analysed, ideally by themselves, with advice.
3. A system of incentives from the Ministry needs to be in place to encourage change. These should involve the corporate sector where appropriate.
4. Guidance and support is needed from the Ministry to ensure that change is brought about. The change team should comprise experts; in few countries is it feasible for them to come wholly from within the sector.
5. The focus should be on academic transformation linked to curriculum reform for subjects of national priority – high-level skills, teacher training (Mathematics and Science especially), not to adding more IT into universities or increasing the cost base of universities for their current types of student.

To do this, there has to be a national analytic framework. This is our final topic.

Benchmarking – a national scheme

The following scheme is based on what has is now in use in Wales and what has been recommended by one project for future use in England. (Scotland is a separate issue.)

1. Focussed on ensuring that an institution satisfying the criteria can rapidly deploy substantially increased amounts of distance learning and e-learning.

2. Aligned to National Policy indicators for distance learning and e-learning.
3. Sustainable, evolving, refining and re-normalising across time but slowly and systematically so as to allow valid year on year comparisons for the sector.
4. Compliance costs feasible for both large and small institutions.
5. Consistent across the whole university sector – and ideally able to be used by private universities.
6. Ideally with some scope for international comparison rather than being “purely Brazilian”.
7. But with extensions for topics of specific institutional, national or state interest.
8. Public and documented within an “open educational methodologies” paradigm.
9. Suitable for collaboration both among similar universities across the nation and with in-state groupings.

Envoi

I hope that this material is useful for Brazil.

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Appendices (only B in this version)

B. The Re.ViCa Project – Review of Virtual Campuses

The following material is taken from the Re.ViCa project proposal.

Aims

Re.ViCa is a project funded under the Lifelong Learning Programme of the European Union. It runs from October 2007 to the end of September 2009.

Re.ViCA aims:

- to make an inventory and to carry out a systematic review of cross-institutional Virtual Campus initiatives of the past decade within higher education at European, national and regional levels.
- to look not only at currently operational Virtual Campuses, but also at the legacy and impact within higher education generally of those Virtual Campus initiatives that have ceased activities.
- to identify relevant parameters and success factors for evaluating and comparing Virtual Campuses, based on thorough research and expert input.
- to organise in-depth discussions at various stages of the project, to incorporate the input of different interest groups: including Virtual Campus management bodies, relevant networks, students, policy makers and a range of experts at a global as well as European level.
- to compare in-depth studies of European cases to selected non-European initiatives in order to refine and elaborate parameters and success factors and to formulate a set of action points that can be applied to ensure the realisation of successful European Virtual Campus initiatives.

Overview

Re.ViCa will conduct its research on Virtual Campuses along a broad range of parameters that will be defined and investigated at the on-set. During this desktop research phase, attention will be paid to former initiatives which can be useful for Re.ViCa's study. This desktop research will be validated by the numerous discussion sessions that Re.ViCa will organise with different stakeholder groups throughout the project.

To ensure the success of the in-depth case studies, special care has been taken in the selection of the partnership with respect to Virtual Campus management experience and a vast range of useful contacts with international experts. Partners will employ this expertise and these contacts to the fullest, in order to further validate and compliment the research.

Partners will be involved in nearly all work packages in order to facilitate knowledge sharing. Contacts outside the partnership and external visibility will be established by prominent presence at the two major annual conferences in the field: Online Educa Berlin and the Eden conference.

At the latter stage of the project, Re.ViCa will prepare a global benchmark overview in order to make the most of its non-European campus visits.

Results

As a result, Re.ViCa will:

- provide an inventory and systematic review of cross-institutional Virtual Campus initiatives that are fully active, have been discontinued or merged with other initiatives or, especially, those that have continued, albeit with a modified structure, within higher education. This review will lead to a taxonomy of cross-institutional Virtual Campuses and will be complemented by recommendations for the different groups of stakeholders.
- stimulate dialogue and share knowledge through the organisation of several discussion sessions at carefully chosen events.
- identify measures of success, best practices and generic parameters that influence the outcome of a Virtual Campus initiative, which can be used as replicable solutions for the set-up of a cross-institutional Virtual Campus.
- contrast its European findings to non-European initiatives and will feed the outcomes of this effort into a set of findings that can be used for future European initiatives.
- compile a manual of guidelines, best practices and recommendations that will be made readily available online and in hard copy.

Partners

Applicant organisation: Katholieke Universiteit Leuven AVNET (BE)

Coordinating organisation: EuroPACE ivzw (BE)

Partners:

- ATiT Audiovisual Technologies, Informatics and Telecommunications bvba (BE)
- FernUniversität in Hagen (DE)
- Teknillinen korkeakoulu, Koulutuskeskus Dipoli (Helsinki University of Technology, Lifelong Learning Institute Dipoli) (FI)
- Université Louis Pasteur (FR)
- Nyugat-Magyarországi Egyetem (University of West-Hungary) (HU)

- Università Telematica Internazionale UNINETTUNO (International Telematic University UNINETTUNO) (IT)
- Matic Media Ltd (UK)

Work Packages

There are six work packages:

1. WP 1 Project management
2. WP 2 Research including Case studies
3. WP 3 Promotion and awareness raising
4. WP 4 Quality and evaluation
5. WP 5 Dissemination
6. WP 6 Exploitation

For reasons of space we describe just the one that underpins the others

Work Package 2 on Research

This is the creation of an historical overview, the inventory and the categorization of Virtual Campuses. The aim of this work package is to develop a useable definition of the concept of the Virtual Campus and, subsequently, to suggest a categorization which applies the theory and respects the differences between the initiatives. It will also draw up a historical overview of the evolution of the concept of the Virtual Campus and the societal context with which it is so closely linked. Following from the historical overview is also an inventory of European, national and regional initiatives of the past decade. This work package will also stimulate all partners to gather contact information and experiences. At EDEN, feedback on this work package will be collected from expert discussions.

Survey of the inventory

This work package will be responsible for the development and analysis of a survey taken from the initiatives identified in the inventory. Quite some time will be spent on preparing the survey on order to maximize its usefulness. For the creation of the survey questions, then, previous initiatives' expertise will be taken into account and where possible adapted to Re.ViCa. All initiatives will be contacted, or, if need be, people who were part of the original management. The partnership will again use its own contacts to the fullest in order to have access to inside information. The data from this survey will then be analysed and improved by adding the feedback recommendations gathered at EDEN (2008).

Multiple case analysis

This work package is responsible for the in-depth case studies, which will be selected from the inventory. Contact will be established with original stakeholders and once more the partnership will be asked to use its own contacts in order to facilitate the gathering of information. This work package will also need to identify and describe the parameters along which the review will be designed. These parameters will include: environmental parameters (legislation, financing, educational structures, etc.); pedagogical approach; technology assessment, quality procedures, content production and relation to research activities; business models; organizational embedding: student and teacher support; accreditation and creditation procedures; language and culture. For these parameters, smaller workgroups will be set up in order to gather those with a specific interest and expertise to work on each of them. Once the parameters have been set, data for each case study will be gathered by questionnaires, interviews and campus visits. Afterwards, experts are given the opportunity to comment during a pre-conference at EDEN.

Critical Success Factors

There is now an emerging set of Critical Success Factors which we are checking against case studies. Interestingly and in line with the latest thinking in UK and some other countries, this set is embedded in a larger set of benchmark criteria – in our case taken from ELDDA (see Appendix D). Note that benchmark criteria can in turn be regarded as a subset of quality criteria.

[actual list omitted but available]