

Update on the work of the Online Learning Task Force

March 2010

The changing face of UK higher education

1. Students increasingly expect that their experience of higher education (HE) will involve the use of online and other learning technologies. As in many other areas of people's lives, an 'instant and on-demand' attitude towards learning has developed, where students expect easier, 24-seven access to learning resources and support. Students see technology as providing them with ways to study more flexibly – whether from home, the workplace, using mobile technologies, on campus, or any combination. The potential of effective online provision is something we believe is already understood by universities and colleges.
2. At the highest level, Government also understands that the market for online learning has huge potential for international growth in UK market share over the next five to 10 years, for both existing and new models of HE. In 'Higher Ambitions: The future of universities in the knowledge economy'¹, for example, the existing strength of online distance learning offered by UK institutions is acknowledged. However, competition is intensifying from both public and private providers, particularly in emerging markets. But it is also clear that developing online learning opportunities in a broad sense is vital to enhancing the quality of learning and the student experience, widening participation, and enabling the personalisation and flexibility that students and employers expect from higher education.
3. Online learning provides the opportunity to enhance two traditional forms of higher education – campus-based and distance-based – and to create new forms within them. Universities and colleges are already enhancing campus-based provision through online learning, and many are using online learning to develop less familiar or new forms of study.
4. The Online Learning Task Force (OLTF) was established in June 2009 to support higher education institutions (HEIs) in exploiting the opportunities offered by online learning. Chaired by Dame Lynne Brindley, Chief Executive of the British Library, it is focused on ensuring the UK HE sector maintains and develops its position as a world leader in online learning.
5. The OLTF has been asked to make recommendations in a number of areas, including:
 - how UK higher education can take advantage of new and expanding markets
 - ways to encourage new students and new types of students into higher education, including through flexible pathways such as workplace and informal learning

¹ 'Higher Ambitions: The future of universities in the knowledge economy', the Government's framework for the future of HE, is available at www.bis.gov.uk under Policies/Higher Ambitions.

- opportunities for collaboration between private and public organisations
- identifying opportunities for targeted investment to support both excellence and provision at significant scale.

It will also consider how institutions can support and enable staff to develop their expertise in this area, and appropriate organisational models to deliver online and blended offerings. The full terms of reference and membership of the task force are available at www.hefce.ac.uk under Learning & teaching/Enhancement/Online Learning Task Force.

Online learning: the current picture in the UK

6. Since September the OLTF has investigated a number of areas.
7. We commissioned research from Technology-Assisted Lifelong Learning at the University of Oxford to provide an overview of the current UK provision of higher education-level online distance learning. This research suggests that:
 - a. More should be done to provide a simple taxonomy of the wide range of student experiences that currently fall under the broad title of 'online distance learning'.
 - b. The vast majority of online distance learning offered by HEIs is focused on postgraduate-level provision.
 - c. Most online distance learning can be identified as professional development, or as having a strong vocational focus.
 - d. It can be challenging for potential students to find out about online distance learning courses, with information often hidden in complex institutional web-sites. Where details are available, they frequently fail to provide the full range of information that a potential student needs to make a decision about studying online.
 - e. We need to improve the market intelligence available to give a clearer picture of the position of UK online distance learning in an international context.
8. We aim to publish the report and recommendations from this research in the summer.

Learning lessons from others

9. The OLTF has considered some of the international market for online learning providers, examining business models and investigating how they have responded to the demand from the market.
10. We have examined what lessons the UK HE sector can learn from previous online learning ventures, whether successful or ones that no longer exist. We will publish further detail on these lessons learned later this year so institutions can capitalise on what has been successful. However, some interesting points noted so far include:
 - a. It is important to clarify the purpose of the venture, including a viable, robust business model.

b. Building on existing success tends to be most effective: in general it seems wise to grow in, and from, subject areas and markets where institutions have an established reputation.

c. Clear leadership and ownership is required to maintain strategic focus and avoid an attitude that online learning is an 'add-on' or peripheral activity.

11. It is also clear that technology platforms are not a barrier to success. The OLTF does not intend to dedicate significant attention to this area. We intend to pay more attention to business models to ensure sustainability and cost-effectiveness, and to pedagogical good practice to support academic quality.

Understanding the demands and perceptions of students

12. The OLTF has commissioned the National Union of Students (NUS) to research the demand for and expectations of online learning among full-time and part-time students. The project aims to understand the views of new and potential students, building on the findings of the NUS/HSBC 'Student Experience Report' which shows that 96 per cent of undergraduate students use the internet as a source of information and 69 per cent use it daily as part of their studies. We expect to publish the outcomes of this research in summer 2010.

13. We will also investigate the type and nature of online learning taking place within primary and secondary schools, in order to improve our understanding of what future higher education students may expect.

Further areas of consideration

14. The OLTF has identified further areas that it wishes to investigate over the next few months before it publishes its report and recommendations late in 2010. At its most recent meeting (March 2010) it began to discuss a number of these and will consider the potential for commissioning specific pieces of work to inform its view. Topics include:

- the potential of open educational resources to be developed, used and shared by institutions to support and enhance online learning in a cost-effective way
- the importance of good pedagogy to the design and delivery of excellent online learning, recognising similarities and differences between on-site, blended and fully online models
- different organisational structures and business models that are used to support the development and expansion of online learning for the benefit of newer entrants
- the potential market for online learning, whether that is in encouraging students without previous HE experience, offering postgraduate or professional development, or extending opportunities for workplace learning
- a consideration of how more and deeper collaboration with the private sector might improve the quality and reach of online learning that institutions are able to offer students
- the nature of the international market

- the level of competition within all potential markets, within the UK and internationally
- whether it is possible or desirable to develop a specific UK HE brand online
- how we might seek to drive innovation in online learning provision in the UK – specifically, whether emphasis should be placed on institutions and providers with an existing ‘critical mass’ of ability or provision, or on supporting (to a lesser degree) a wider range of new providers.

15. The OLTF is aware that there are a number 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. It is keen to ensure that institutions harness such expertise, and hopes to draw valuable lessons from these organisations in terms of successful shared services, academic development, marketing/promotion and intelligence opportunities. However, it is also considering the potential for other pre-competitive or shared services to be established to provide appropriate leadership and support.

16. The OLTF has sought out successful examples within the sector and will look to case studies to illustrate the various models of provision. Some of the models coming to the fore so far are:

- public/private partnerships
- validation of private providers
- niche specialist providers
- individual distance providers.

17. Examples include: the University of Essex in conjunction with Kaplan Open Learning; the University of Leicester; the partnership of the University of Liverpool and Laureate International Universities; the University of London External System; and the Open University. The task force will consider other providers over the coming months.

Invitation to contribute to the work of the OLTF

18. The OLTF comprises a wide range of representatives from HEIs and the private sector, and is establishing a broad understanding of the diverse online learning provision offered by various organisations. However, we wish to ensure that this understanding is as comprehensive as possible before considering any recommendations to HEFCE, the Government, other funders and institutions.

19. The OLTF therefore invites comments about the issues discussed in this paper, including examples of successful strategies for developing online learning (whether for use on campus or at distance). We are keen to hear from a range of contributors as well as universities and colleges: for example, employers, publishers, other private sector organisations and not-for-profit organisations.

20. It would be helpful to receive submissions that address some or all of the following questions:

- a. What are the motivators behind your strategy and what are barriers and enablers that the OLTF should understand and try to address?
- b. What organisational structures and collaborations do you see as most successful in facilitating the successful development and delivery of online learning?
- c. How can universities and colleges create and develop appropriate cultures to ensure that online learning thrives within an institution?
- d. How does online learning fit into the strategic vision of your organisation over the next five to 10 years?

21. Submissions should be a maximum of 1,500 words and should be e-mailed to oltf@hefce.ac.uk by **Friday 14 May 2010** so that the task force can consider them at its next meeting, at the beginning of June.

22. The OLTF is organising a seminar to discuss its work and hear from interested parties. This will take place on Friday 25 June, at the Conference Centre of the British Library. Further information will be available on the HEFCE web-site in April.

23. Enquiries about the seminar should be e-mailed to oltf@hefce.ac.uk.

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