Challenges and Realisations from the Higher Education Academy/JISC Benchmarking and Pathfinder Programme

An End of Programme Review by the Higher Education Academy, Evaluation and Dissemination Support Team

September 2008
In August 2005 the Higher Education Academy invited me to consider a secondment from my University of Bath role to the then relatively new agency in order to assume leadership of a benchmarking of e-learning exercise which would also be the gateway to an associated ‘pathfinder’ programme. I have undertaken many such secondments during my working life with the best experiences and outcomes arising from contexts and environments where there are big challenges to overcome but also the opportunities to apply creative thinking and the freedom to build a strong team to help overcome said challenges. The Benchmarking & Pathfinder Programme probably represents one of the most rewarding initiatives with which I have been involved. The report by Terry Mayes, Jane Plenderleith, and Veronica Adamson provides the necessary detail but in this foreward I outline the programme leader's view of what has enabled the initiative to realise a significant part of its overall potential although I readily acknowledge that there is much more still be done.

Several things stand out for me. First, as the report points out, there was the need to consult with a sector that was deeply suspicious of concepts like benchmarking and possible misuse of the results of the exercise. Second, in an immature area of development it was essential that the Academy was not seen to confuse particular benchmarking tools with processes and instruments that could facilitate organisational insights and development, i.e. we wanted more than an introspective or technical exercise based on populating an online tool with data which would then attempt to offer an auto comparison and relative positioning in what is an extremely diverse UK HE sector. Third, the programme needed to be progressive so that the analytical and reflective opportunities offered by benchmarking fed into actual institutional decision-making to be realised in the Pathfinder Programme in the form of activities which could be sustained beyond the initial funded period. Fourth, the programme needed to be inclusive, so that institutions of all profiles and at all stages of e-learning development felt a sense of ownership and control but were also prepared to contribute to programme activities and, collaborate/share with each other. Finally, we wanted to introduce a model in which agencies like the Academy are not just perceived to be funders but also make valued practical contributions to helping participating institutions realise their goals. We did this by embedding an expandable team of benchmarking advisers and 'critical friends' whose guidance and benign interventions were much appreciated by many of the 77 participating institutions.

Although we can always improve, and there is still much left to do, I think the programme has achieved a great deal since January 2006. If I were asked to identify the major outcomes or insights I would assert that:

1. The programme has been very inclusive to a point where the "team" supporting and realising the programme now includes many of the participating institutions themselves. The CAMEL cohort self-support groupings, and the Pathfinder Network Projects, are of particular note in this regard.

2. We needed to readjust our sector-level Pathfinder concept to reflect the reality that the insights gained from the benchmarking exercise meant that it was more useful for the projects to focus on being 'Pathfinders' at institution level rather than seek to be an elite sector-level exemplar. As the report highlights, the inclusive nature of the
programme meant that the journey for each institution was unique, but all gained something valuable from their involvement.

3. Many of the Benchmarking & Pathfinder institutions themselves now offer a valuable resource for the sector; and relatively modest funding has facilitated cross-institutional support and sharing of experiences.

As the report you are about to read highlights, the Benchmarking and Pathfinder Programme was not really about technology at all, it was about people and the richly diverse organisations they work in. Any successes achieved by this programme have been because of these people "on the ground" and their ability to successfully negotiate the challenges they faced. Particular plaudits must go, therefore, to the project teams in each of the institutions who responded so positively to what, for many, was the new experience of having either a specialist adviser and – or – critical friend embedded into the infrastructure of the programme rather than the more conventional model of formal and limited interactions between agency funders and institution projects. I also believe that we have all benefited from the magnificent contributions of the uniquely experienced, knowledgeable and talented team of advisers and critical friends. This team have all made contributions far beyond their contracted hours because of their commitment and belief in what we were trying to achieve. For this reason in this foreword and in no particular order I wish to applaud the much-valued contributions of:

- Professor Paul Bacsich (benchmarking adviser, Pathfinder critical friend, and benchmarking "Wiki Meister")
- Professor Peter Chatterton (benchmarking adviser and Pathfinder critical friend)
- Dick Hill (benchmarking adviser)
- Bruce Carter (benchmarking adviser)
- Svava Bjarnason (the then Director of ACU/OBHE - benchmarking adviser)
- John Fielden (ACU/OBHE - benchmarking adviser)
- Allan Schofield (ACU/OBHE - benchmarking adviser)
- Cliff Wragg (ACU/OBHE - benchmarking adviser and Pathfinder critical friend)
- Professor Betty Collis (Pathfinder critical friend)
- Professor Grainne Conole (Pathfinder critical friend)
- Andrew Comrie (Pathfinder critical friend)
- Dr Jane Plenderleith (HE Academy Evaluation & Dissemination Support Team)
- Veronica Adamson (HE Academy Evaluation & Dissemination Support Team)
- Professor Terry Mayes (Team leader HE Academy Evaluation & Dissemination Support Team)

It was the synergy achieved by combining the efforts and "benign interventions" of the above list of advisers and critical friends, the energy and co-operation of the individual project teams, plus the community-building activities of the five Pathfinder Network Projects that I believe offers the sector such a useful reference model for future developments of this type.

There are already a wealth of reports and briefings currently available on both the Benchmarking and Pathfinder weblogs with more pending. We will also provide a portal page to all of the aggregated reports on the Academy web site.

Finally, I think it is important also to applaud the role of HEFCE, particularly Dr Liz Beaty, the then HEFCE Director of Learning and Teaching, who charged the Academy with leading this demanding initiative and then trusted all of us to deliver. I believe this has been as successful a programme as it could be in the time available to us; but yet there is so much left to do. Seventy-seven institutions took part. That means there are still many institutions that did not. But, as the presentations at ALT-C 2008 and other recent national and international events have proved, there is now a very high level of interest in what has been achieved, and in how it has been achieved. The challenge for us all now is in how to maintain the impetus.
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Purpose and Structure of this Report

This report attempts to highlight the main lessons that have been, or may be, drawn from the Academy’s e-Learning Benchmarking and Pathfinder Programme, calling on the authors’ experience of providing close support for the programme itself, and extracting key messages from the participants’ own evaluation reports. In that sense it can be regarded as having elements of a synthesis, as well as both formative evaluation and summative review.

Much has already been written and reported on the programme. The Academy maintained a weblog for both the Benchmarking Exercise1 and the Pathfinder Programme2 with links to relevant reports and documentation, and encouraged regular postings on general issues of interest in the domain of e-learning as well as operational information about the programme. Each of the participating institutions also maintained a weblog of their benchmarking and, where appropriate, Pathfinder projects. An evaluation of the Pilot Phase was produced by Professor Terry Mayes in August 2006. Consultants responsible for the various benchmarking methodologies that have been supported in the programme have produced reports at the end of each of the three phases (Pilot, Phase 1 and Phase 2). The Phase 2 reports from the teams of consultants involved included discussion of some of the key points of development in both the methodological approaches and the institutional findings about e-learning in the course of the programme. The Evaluation and Dissemination Support Team (EDSuT) produced summary reports at the end of Phase 1 and Phase 2 of benchmarking. All the Pathfinder projects have made available their reflective accounts of the Pathfinder ‘journey’, and almost all have produced briefing papers, summarising results and key messages from their project for a defined readership. EDSuT also reported on the experiences of the Critical Friends at various points throughout the Pathfinder programme.

This report draws on all of those sources of information. It starts by outlining the three Phases of the benchmarking exercise in terms of participating institutions, the methodologies used and support activities. It presents a brief summary of the five benchmarking methodologies and their development through the Programme. It summarises the experiences and key messages from institutions participating in the benchmarking process, and offers a commentary on some of the issues, questions and challenges arising from the benchmarking exercise in general. The second half of the report describes the Pathfinder programme. It discusses Pathfinder’s relation to benchmarking, its approach to evaluation, and the innovations it introduced. Finally, the report summarises the main outcomes of the Pathfinder programme and considers its key messages for future development. Where appropriate, this report points the reader to other documents, in which more comprehensive descriptions may be located. Most of these are available to download from the Academy’s weblogs.

The title of this report echoes the title of an event held in June 2008 at the conclusion of the Benchmarking and Pathfinder Programme. Like that event, this report is intended as a celebration of the achievements and outcomes of the Programme, a review of these achievements summarising a range of institutional and agency perspectives, and an initial consolidation of programme outputs and outcomes for wider dissemination and impact in the sector.

1 http://elearning/heacademy.ac.uk/weblogs/benchmarking/
2 http://elearning/heacademy.ac.uk/weblogs/pathfinder/
Undertaking our Pathfinder project has been a sharp affirmation of the value to the sector of creating a non-threatening context in which to share ideas and problems, where difficulties can be discussed openly and treated sensitively, where new ideas can be generated and confidences respected.

Extract from University College Plymouth St Mark & St John Pathfinder Journey report.

Almost imperceptibly it appears that institutional maturity for the uptake of e-learning has moved beyond the assurance that all modules are using an institutional VLE for baseline communication and information-sharing with students, to a position where innovation in approaches and technologies can address enhancement strategies. This is evidenced by the large numbers of academics attending our dissemination events and feeding back on intentions to change practice. As a result Pathfinder ought to demonstrate to the funding councils that trust, rather than measurement and metrics, leads to contextually-significant, continuous improvement.

Extract from the De Montfort University Pathfinder Project Report

Pathfinder funding allowed us a period of reflection and action, focusing attention and resources on e-learning. We have learnt a lot.

Extract from the University of Warwick Pathfinder Journey Report

Acknowledgements

We record here our gratitude to all those who have participated in the programme, ensuring not just a successful outcome for the projects, but the building and strengthening of a real community. Special thanks must go to Derek Morrison, for his leadership and drive; to Liz Pearce and Ellie Spilman for their thoughtful and effective support; to the Benchmarking Consultants and Critical Friends for their enthusiasm and expertise, and finally to the project teams themselves who have responded to all pressures with good humour and much commitment.

Terry Mayes, Veronica Adamson and Jane Plenderleith
Executive Summary

1. The programme has achieved its primary aim of building e-learning capacity and embedding good practice into mainstream provision. All of the institutions report real benefits from participating, and the project reports contain a message of significant progress in understanding e-learning processes, practice and provision. There is a sense of growing confidence about the use of technology for learning and teaching, and a much deeper understanding of the issues for institutional policy.

2. The programme has achieved a wide penetration across the sector, with 77 institutions participating in at least one of the benchmarking phases. The level of engagement achieved for the wider programme from the individual projects has been very high. Institutions have responded well to the opportunity to take responsibility for their own approach, with the lead agency taking a facilitative rather than a supervisory role.

3. The programme has been characterised by trust. The benchmarking exercise depended on the institutions trusting the benchmarking consultants with their confidential analyses, and trust between institutions willing to share their analyses across a cohort of peers. The Pathfinder institutions have been trusted to devise projects based on their own individual strategic review and analysis, the projects have been trusted to conduct their projects effectively and reflectively through building trust relationships with Critical Friends and with each other, and through sharing their reflections on the challenges. The direction from the programme, and its administrative style, has been light-touch, in keeping with HEFCE’s aim to achieve institutional ownership of the programme. The programme’s overall approach has been widely appreciated by the projects themselves.

4. Institutions were using benchmarking in one of two ways: to ‘prove’ that they are on the right track, or to ‘improve’ their current practice through a rigorous and sometimes painful process of self-review. This distinction between ‘proving’ and ‘improving’ is relevant to definitions of formative and summative evaluation and reflects the essentially evaluative nature of benchmarking.

5. The benefits of expert consultant facilitation, support and brokerage were consistently identified throughout the programme.

6. The Academy’s policy of ‘constrained diversity’ served to stimulate developing understanding of benchmarking methodologies and their application.

7. The programme has achieved the unusual goal of building capacity primarily in areas of acknowledged weakness, rather than strength. This is a consequence of awarding Pathfinder funding to an institution only after the benchmarking stage had been satisfactorily completed.

8. Although the programme did not require benchmarking outcomes to become public (though several institutions chose to place their reports in the public domain) the programme, through the Pathfinder ‘journeys’, has furthered HEFCE’s goal of presenting a rich picture of where much of the sector is positioned with regard to the wider, and evolving, e-learning landscape.

9. Pathfinder has introduced three innovations for a programme of this scope. Each has been reported by the projects themselves as highly effective. These are:
   • An ‘Evaluation and Dissemination Support Team’ that has worked formatively inside the programme, yet has remained distinct from the programme’s management. This team has offered programme-wide support for the projects’ own evaluation methods. It also presented reflective views and insights, and summary reviews and reports, from an external, objective standpoint.
   • The clustering of projects, in phase 1 of Pathfinder, into groups of four, with the encouragement (through additional funding) to each cluster to learn from each other in an open and sharing way, following the ‘CAMEL’ model (see section 4.5 below) .
This has been reported by the projects, without exception, to have added a very successful collaborative dimension, and has enhanced the outcomes across the board.

- The appointment of a Critical Friend to the institutions in each cluster, with a role of ‘insider’ support, yet offering guidance and expertise often not available to an individual project from within the institution. This, too, has been widely appreciated by the projects.

10. The Academy and JISC have collaborated in running the programme, though the Academy has played the lead role. In many of the projects both agencies have a joint interest – their specific areas of organisational focus coming together in projects that are essentially concerned with the interaction of technology and pedagogy. The programme has also drawn interest from the QAA, and the need for the Leadership Foundation to play a role has been expressed. The benefits of a CAMEL approach might usefully be achieved by all these agencies working together in that way.

11. Many participating institutions have stated their intention to repeat the benchmarking exercise in some form at regular intervals. It is a small step from that intention to the formal inclusion of benchmarking in institutional review procedures.

12. There is an emerging interest across the programme as a whole in a subject-based approach to sector-level benchmarking, with particular reference to the Subject Centres and some CETLs as both a focus for benchmarking activities and as a forum for reflecting and acting on some programme outputs and recommendations.

13. Five of the original pilot Pathfinders were awarded funding to take their approach to the wider sector and all have done so to great effect. Consequently, there are now special interest groups (SIGs) emerging around key issues (quality and e-learning, course redesign, podcasting and pedagogy, researching the student experience). It is too early to comment on the sustainability of the communities that have been drawn to these SIGs, although initial signs are promising that these will continue to play a sector-wide role. Modest ongoing support from the agencies for these emerging communities is likely to produce significant leverage.

14. If the key outcome of the Benchmarking and Pathfinder programme were to be captured in a single phrase, this could be ‘building relationships’. The transforming theme of the programme has been in directly empowering people to use technology to enhance practice, processes and provision. The programme has helped to develop powerful and potentially lasting relationships between institutional departments and services, between institutions with often vastly different profiles and cultures, and between the sector and support agencies.

15. Institutions still struggle with the challenge of positioning these change projects in a way that allows them to be optimally effective. In some ways this reflects tensions in a culture in the sector that accords significant autonomy to academic disciplines, but seems to hold in lower esteem areas of provision that are designated as ‘support’. Despite its many successes, Pathfinder has encountered difficulties in gaining a truly institutional commitment to a significant minority of its projects.

16. The programme has focused on e-learning, but has achieved a broader significance for quality enhancement and continuous improvement in all aspects of provision. There is increasing strategic recognition that technology-based solutions are integral to all aspects of the sector’s business, with particular reference to the core activities of learning, teaching and assessment.

17. The overall programme has been a significant success and it seems important that the progress made should be built on through further enhancement-led initiatives. The programme’s ethos and processes provide a reference model.
The Programme’s Rationale and Strategic Background

1.1 In response to publication of the HEFCE Strategy for e-Learning (March 2005), the Higher Education Academy and JISC submitted a proposal and draft project plan to the HEFCE for a Benchmarking Exercise and related Pathfinder Programme in June 2005. The Benchmarking Exercise was intended to help institutions establish where they were in regard to the embedding of e-learning. The Pathfinder Programme was designed to help selected institutions, on behalf of the sector, to identify, implement and evaluate different approaches to the embedding of technology-enhanced learning in ways that result in positive institutional change. The proposal was accepted by HEFCE, and the Academy was invited to take the lead role in partnership with JISC in planning and implementing the proposals.

1.2 An important element in the policy context that influenced this strategy had been the restructuring of the UKeU, an episode which many in the sector interpreted as a failure of the Funding Councils’ attempts to exploit the potential of technology-based learning through centrally-driven initiatives. It was the reallocation of funds from that initiative that provided the resource for the Benchmarking and Pathfinder Programme. The strategic background to the programme is the emphasis in the HEFCE strategy on placing the responsibility for, and ownership of, e-learning development clearly with the individual institution.

1.3 In the strategy, HEFCE asked the Academy and JISC to identify and implement a benchmarking tool for HEIs which might also provide information, at a sector-wide anonymised level, to help HEFCE and its partners draw conclusions on the state of e-learning, progress towards embedding it, and the impact of the 2005 strategy:

... we should know more about the present state of all forms of e-learning in HE. This is essential to provide a baseline to judge the success of this strategy. However, understanding HE e-learning is not just a matter for HEFCE. Possibly more important is for us to help individual institutions understand their own positions on e-learning, to set their aspirations and goals for embedding e-learning – and then to benchmark themselves and their progress against institutions with similar goals, and across the sector. (Our emphasis)

In taking forward this project, the Academy was encouraged to take a ‘light touch’ approach and to be responsive to the needs and expectations of institutions.

1.4 A Town Meeting was held at Academy York on 9 November 2005 in order to consult with the sector about the proposals for a national Benchmarking Exercise and Pathfinder Programme. As a result of the feedback from this meeting the original project plan was amended during November 2005 and resubmitted to the HEFCE which accepted the revisions in December 2005. Not surprisingly, at first some regarded the Benchmarking/Pathfinder programme call as representing another attempt to steer e-learning development centrally and at the Town Meeting there was widespread opposition to the proposal that all participants should undertake a common benchmarking methodology. Partly this seemed to reflect the English sector’s attitude towards quality assurance, shaped by the experience of QAA audit. It also reflected a determination not to engage in any sector-wide activity that might allow the publication of league tables.

1.5 The HEFCE strategy placed emphasis on the embedding of technology applications into all aspects of institutional activity. An internal Academy discussion paper questioned whether placing an emphasis on embedding across the board tended to

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3 http://www.hefce.ac.uk/pubs/hefce/2005/05_12/
obscure the need to evaluate where the added value of the technology really lies. Throughout the duration of the programme, discussions returned frequently to the really challenging issue of how to assess the extent of the enhancement that was obtained through technology, and how to connect the enhancement directly to the student experience, including ultimately the depth of student learning. Some of the debate appears on the Academy Pathfinder weblog\(^4\), but in the main the difficulty of this issue is acknowledged implicitly in several of the project reports. Each project was encouraged to find ways of evaluating its own impact.

1.6 The HEFCE strategy for e-learning was developed with an intended timeframe of ten years, and included eight *Measures of Success* for the embedding of e-learning over this period. It was anticipated that interim reviews and refinement of the strategy would be informed by the benchmarking exercise and Pathfinder Programme. These attempted to describe outcomes that would confirm that e-learning had been effectively embedded. Even these, however, rather avoided the issue of the extent to which such embedding would bring about enhancement of student learning. In the terms that the issue was discussed on the weblog these are still ‘input’ measures (of provision, rather than ‘output’ measures of learning achieved).

2 Approach to Evaluation

2.1 The rationale for evaluation was set out in the document dated 05.10.06 by Derek Morrison and Liz Pearce entitled ‘A Capacity Enhancement Approach to institutional evaluation and dissemination for the HE sector Benchmarking Exercise and the Pathfinder programme’. The evaluation emphasis was formative.

>*Rather than evaluate the projects per se the primary purpose of the Evaluation & Dissemination Support Team is to build evaluation, reflection, and dissemination capacity in the institutions taking part in the Benchmarking and Pathfinder initiatives. Put more simply, rather than the Academy evaluating projects the aim is to help projects evaluate themselves; with, in the case of the Pathfinder Programme, the input of peers.*

2.2 Support for the projects to undertake evaluation of their own effectiveness was provided at the programme level. As the programme proceeded from the pilot stage to phase 1, the support at the programme level was strengthened. During the pilot phase of Pathfinder and phase 1 of Benchmarking an evaluation and dissemination support team (EDSuT) was recruited. This was significantly strengthened for phase 1 of Pathfinder by recruiting a further six Critical Friends.

2.3 An innovative approach to evaluation was attempted through an emphasis on continuous reflective input to a weblog that would be maintained by the participating institution. The reporting requirements were light touch, but were expected to make appropriate links to the project’s blog, where a reflective elaboration would be accessible.

2.4 Each of the benchmarking institutions was asked to complete a short summary report to enable the Academy to gather views and lessons from the benchmarking exercise in a consistent way across all of the methodologies. The EDSuT produced summary reviews of the views and experiences of participating institutions at the end of Phase 1\(^5\) and Phase 2\(^6\).

\(^4\)*[http://elearning.heacademy.ac.uk/weblogs/pathfinder](http://elearning.heacademy.ac.uk/weblogs/pathfinder)*

\(^5\)*[http://elearning.heacademy.ac.uk/weblogs/benchmarking/?p=315](http://elearning.heacademy.ac.uk/weblogs/benchmarking/?p=315)*

\(^6\)*[http://elearning.heacademy.ac.uk/weblogs/benchmarking/?p=371](http://elearning.heacademy.ac.uk/weblogs/benchmarking/?p=371)
2.5 Pathfinder projects were asked to approach evaluation by identifying stakeholders and using a simple framework to extract the key evaluation questions and then to track the impact of the interventions. A mini-guide to evaluation for projects in this area was produced by Glenaffric Ltd from the Evaluation Handbook previously developed for JISC innovation programmes\(^7\), and distributed to the Phase 1 projects.

2.6 The conceptual framework for capacity enhancement presented two strands: 'Evidenced by' and 'Supported by'. All of the activities in the evidence strand were intended to be undertaken by the institution taking part in the programme, and the evidence gathered and recorded by the project itself. The support strand was seen as providing a set of resources that would offer direct guidance and encouragement. It was anticipated that the evidence for capacity enhancement would constitute a very diverse set of outputs, including qualitative assessments and reflective accounts. These would be summarised in the reports from each project, and a synthesis provided by the EDSuT. The EDSuT also conducted face-to-face or telephone interviews with the Pathfinder pilots, and recorded some that were downloadable as audio files from the weblog site. For the Pathfinder phase 1 projects an extra layer of support was provided, in the form of Critical Friends. By this stage the emphasis had moved very much away from external evaluation and the Critical Friends were positioned as formative support, working from within each project. The EDSuT interviewed each Critical Friend on at least two occasions and reports were produced.

3 The Benchmarking Programme

Overview

3.1 The Pilot phase of the benchmarking exercise ran from January to July 2006. Phase 1 started in October 2006, and Phase 2 in May 2007. By the end of the programme in July 2008, a total of 77 HEIs had undertaken an internal e-learning benchmarking exercise supported by the Academy, including some Welsh and Scottish institutions (see Appendix A). The following table illustrates the number of institutions using the different methodologies in each Phase:

<table>
<thead>
<tr>
<th>Methodology</th>
<th>Pilot</th>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Total</th>
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<td>eMM</td>
<td>1</td>
<td>0</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Pick&amp;Mix</td>
<td>3</td>
<td>7</td>
<td>10</td>
<td>20</td>
</tr>
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<td>MIT90s</td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>OBHE/ACU</td>
<td>4</td>
<td>21</td>
<td>10</td>
<td>35</td>
</tr>
<tr>
<td><strong>Phase Total</strong></td>
<td><strong>12</strong></td>
<td><strong>38</strong></td>
<td><strong>27</strong></td>
<td><strong>77</strong></td>
</tr>
</tbody>
</table>

3.2 Complementing the HEFCE-funded benchmarking activity, the Academy has also supported a self-organised grouping of Scottish Universities who formed a Scottish Benchmarking Group (SBG) and were monitoring the exercise in order to inform their own projects.

3.3 The benchmarking exercise was managed by the HE Academy e-Learning team, and supported by the EDSuT led by Professor Terry Mayes with Veronica Adamson and Jane Plenderleith of Glenaffric Ltd. Professor Mayes supported the Pilot phase; the extended team support Phases 1 and 2. The main role of the EDSuT was to help institutions to enhance their own capacity to evaluate and disseminate, complementing

\(^7\) [http://www.jisc.ac.uk/media/documents/programmes/elearningcapital/evaluationhandbook.pdf]
the work of the methodology support consultants who have a defined operational role. This included identifying issues, potential synergies, and sources of information across benchmarking methodology clusters, providing support for further development and innovation opportunities in relation to action planning arising from benchmarking, and synthesising key themes and messages arising from the exercise for the sector.

3.4 For each Phase of the exercise, the Academy organised a Town Meeting for interested institutions to introduce the benchmarking exercise and provide guidance on the various methodologies. Subsequent start-up meetings were also organised for each Phase, providing an opportunity to discuss and reach a shared understanding of anticipated outcomes and surface some of the key areas of interest and expertise in the participating institutions. Start-up meetings also offered a forum for discussing approaches, methods and expectations with the various consultancy teams, and introduced the programme-level support provided by the EDSuT.

3.5 In April 2007, the Academy organised a Programme-level symposium and workshop entitled ‘Taking Stock’ for participants in the Benchmarking of e-Learning Exercise and the Pathfinder Programme. The aims of the event were to take stock of the progress currently made in both the Benchmarking and Pathfinder Programmes, to shape the stages to come by reflecting on the experience of the current participants, and to expose all participants to multiple perspectives on current trends in institutional e-learning development across the UK.

3.6 A final programme-level benchmarking meeting at the end of Phase 2 in January 2008 provided a forum for a review of the Phase 2 and the benchmarking exercise in general, and an exploration of next steps for participating institutions. It also presented an opportunity to take stock of the implications of and outcomes from benchmarking in relation to the development of national e-learning strategies and other sector developments in e-learning.

3.7 The Academy was also concerned to support the development of a community with a theoretical and academic interest in benchmarking e-learning as well as a community of practitioners engaged in the process of benchmarking e-learning. The development of a concordance exploring of the similarities and differences and mapping points between different approaches was undertaken as a separate, but complementary, activity during the benchmarking pilot phase. This work was continued and extended during the later Phases through the development and maintenance by Professor Paul Bacsich of a Benchmarking wiki.

3.8 A further important element of support for benchmarking was the Academy’s benchmarking weblog. The weblog was used as a focus for reflection on issues of interest pertaining to benchmarking or arising from the process, and to communicate programme-level information and guidance (for example about reporting and programme meetings). Consultants also made weblog postings about general methodological issues and operational information. For Phase 2, the EDSuT also developed Helga, a social networking website based on the open source Elgg system for benchmarking institutions to establish their own communities and groups for private online reflections, team discussions, and sharing resources.

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The concordance and wiki were developed and maintained on behalf of the Academy by Professor Paul Bacsich, benchmarking consultant and leader of the Benchmarking e-Learning Associated (BELA) group.

9 http://elearning.heacademy.ac.uk/weblogs/benchmarking/

10 http://www.glenaffric.co.uk/helga/

11 http://elgg.org/
4 Benchmarking Methodologies

4 Introduction

4.1 It was recognised at the outset of the Programme, informed by feedback at the inaugural Town Meeting in November 2005, that there was no simple solution or definitive methodology for benchmarking e-learning. The sector is diverse, institutions are protective of their autonomy, and methodologies specifically designed for benchmarking e-learning in HE were limited in number. Most were still in the early stages of development, had only been exercised in other contexts, and some just with very limited pilots. Hence all the potential benchmarking e-learning methodologies required adaptation for implementation in the UK HE context. The Academy believed there was no single benchmarking method that would suit the needs of all institutions, and that the final arbiters of what was appropriate should be the institutions involved in the process themselves. However, it was also acknowledged that offering and supporting an infinite variety of benchmarking approaches was neither feasible nor desirable. Taking all these factors into consideration, the Academy offered to support five benchmarking approaches that had been identified by the institutions that had responded to the initial expression of interest.

4.2 All five methodologies were implemented during the Pilot phase. The Pilot was not, however, designed as a controlled trial of the methodologies with a view to a consensus approach or recommended single approach. For Phases 1 and 2, the Academy implemented a system of 'constrained diversity', supporting methodologies which were proposed for use by four or more institutions. This system was introduced following the evaluation of the Pilot phase which concluded that while there was no methodological reason to include or exclude a particular benchmarking approach, participating institutions had drawn value from coming together in groups at key points in the benchmarking process, and from the general opportunities for networking and collaboration presented by cohort groupings. This resulted in four methodologies being offered in Phase 1 (ELTI, MIT90s, OBHE/ACU and Pick&Mix) and three in Phase 2 (eMM, OBHE/ACU and Pick&Mix).

The Methodologies

4.3 ELTI (Embedding Learning Technologies Institutionally) was originally developed as part a JISC project which completed in 2003. ELTI focuses on three key areas: Culture, Infrastructure and Expertise. The approach was designed to inform the process of embedding learning technologies, assist in developing appropriate institutional structures, culture and expertise and encourage collaboration.

4.4 eMM (e-Learning Maturity Model) was developed by Professor Stephen Marshall of the Victoria University of Wellington\(^\text{12}\) for application in the context of the New Zealand tertiary education sector. eMM is based on the principle that an organisation's processes mature along a five step model of capability in e-learning moving from 'ad hoc' processes and decision-making to an informed, engaged and reflective culture of continuous improvement.

4.5 MIT90s is a conceptual framework for understanding the effect of evolutionary and revolutionary change through the development of the use of technology in educational organisations leading to a range of increasing potential benefits. The framework was developed at the Massachusetts Institute of Technology (MIT) in the 1990s for planning and monitoring strategic change in relation to e-learning, and represents an organisation as comprising of five elements, all in interaction with each other – its

\(^{12}\)http://www.utdc.vuw.ac.nz/research/emm/
strategies (for technology use), its organisational structures, individuals in roles, management processes and technologies

4.6 OBHE/ACU (Observatory for Borderless Higher Education/Association of Commonwealth Universities) is a collaborative benchmarking methodology which offers institutions the opportunity for comparison at the process level and promotes the development of shared good practice statements. The approach is informed by the development of an Institutional Review Document by each participating institution, structured on eight themes: Strategy Development, Management of e-Learning, e-Learning Delivery, Resources for e-Learning & Value for Money, e-Learning and Students, e-Learning and Staff, Collaboration & Partnerships, and Communications Evaluations and Review.

4.7 Pick&Mix was developed by the Programme benchmarking consultant Professor Paul Bacsich, Pick&Mix is based on a systematic review of other approaches to benchmarking e-learning, looking for commonalities of approach but also taking a fresh start. It includes a set of core and supplementary criteria, with an option for the inclusion of local criteria specific to the needs of a participating institution.

Methodology Developments and Refinement

4.8 The OBHE/ACU benchmarking approach was managed and supported by a team of consultants based at the ACU. This methodology involves a process of institutional self-review facilitated by consultant visits and resulting in the production by the institution of an Institutional Review Document (IRD). A draft report identifying good practice across all participating institutions was then produced by the consultants on the basis of the collective IRDs for each cohort. This draft report was discussed and analysed during a two-day residential workshop, where examples of institutional good practice were shared, and key high-level management issues considered. Following the workshop, the consultancy team prepared a final report, containing the agreed elements of good practice. Institutions were then invited to rate their performance against each of the good practice statements using defined criteria. A summary of all ratings was then provided, with institutional identities protected, enabling individual institutions to compare their own ratings with those of others without infringing confidentiality. Each institution was then offered further consultant support to help with action planning in the light of the benchmarking process.

4.9 The other methodologies were managed and supported by the Benchmarking e-Learning Associates (BELA) group led by Professor Paul Bacsich. Much work was done through the programme to refine and develop existing benchmarking methodologies to enhance their relevance and effectiveness for the UK HE context. In Phase 1, efforts were made to provide an intellectual underpinning to MIT90s and to reconceptualise MIT90s in terms of criteria formulation and group working. The ELTI conceptual framework was refined and revised, and new contextualisations with relevance to the UK HE sector were added by the institutions involved in Phase 1. Resources produced by the institutions for the implementation of ELTI were made available for wider use following the completion of the exercise. Pick&Mix has evolved through the three Phases of the programme, reflecting both refinements in the implementation of the methodology, and changes in the scope of e-learning for participating institutions. The expertise and resources developed for eMM in the Pilot phase were accessed and further developed when this methodology was implemented with a cohort of institutions during Phase 2.

4.10 The BELA consultants report at the end of Phase 2\(^{13}\) highlights some developing commonalities between the benchmarking methodologies. Pick&Mix was further

\(^{13}\) http://elearning.heacademy.ac.uk/weblogs/benchmarking/?p=358
adapted to incorporate some of the key concepts from MIT90s. Some Pick&Mix institutions reported against MIT90s categories and envisioned their change management in such terms. Through the programme, an increasing set of commonalities also developed in the ways that the methodologies were used, for example in the organisation of cohort meetings and their format, scoring meetings and the use of 'slices' to explore and benchmark a particular service, organisational structure, academic provision or other institutional area of interest. The development of common features in the approaches to benchmarking in the programme included influences on, and from, the OBHE methodology: appreciation expressed by participants in the Pilot phase for the workshop approach that is central to the OBHE approach was instrumental in the provision of additional cohort meetings for other methodologies in later Phases, and later iterations of OBHE in the programme incorporated some of the vocabulary and concepts of slicing. However, consultants have also noted that there are almost no commonalities between the various methodologies at a detailed level.

4.11 Increasing attention was paid in successive Phases of the exercise to the role in benchmarking of the Measures of Success outlined in the 2005 HEFCE Strategy for e-Learning. Some institutions addressed the HEFCE measures in their internal institutional reports and in the summary reports they produced for the Academy. In Phase 2, effort on the part of the consultants went into mapping both Pick&Mix and eMM to the HEFCE measures. The requirement to produce an anonymised carpet of scores and the desire to produce a carpet across the sector drew attention to the need for standard indicators. Towards the end of Phase 2, work was also undertaken to map both Pick&Mix and eMM to the Indicators of Success that HEFCW was developing for its 2008 Enhancing Learning and Teaching through Technology Strategy. HEFCW has asked the Academy to support benchmarking in institutions in Wales that had not participated in the three Phases of the benchmarking exercise, in preparation for enhancement activities in support of the implementation of this strategy. The refinement of benchmarking methodologies continues in this context through the development from Pick&Mix of the ELDDA benchmarking methodology, currently being used in the Gwella Enhancing Learning and Teaching through Technology Programme for HE in Wales.

4.12 The OBHE methodology was originally developed for application in an international HE context. eMM has an increasingly international user base, an attribute that was of particular interest to some participating institutions in the UK, some of which expressed the intention to take benchmarking forward in the context of the Worldwide Universities Network group. The UK benchmarking exercise has enhanced the development of these methodologies in this international context, in the case of eMM leading to a number of refinements with wider applicability. Opportunities for international benchmarking of e-learning in HE remain, with some caveats about differences in the methodological approach (consultants have noted that the application of eMM in the UK is more in the style of lightly moderated self-audit and hence possibly susceptible to grade inflation).

14 http://elearning.heacademy.ac.uk/wiki/index.php/Measures_of_Success
15 http://www.hefcw.ac.uk/Publications/circulars_5137.htm
16 http://elearning.heacademy.ac.uk/weblogs/gwella/
17 http://www.wun.ac.uk/
5 The Benchmarking Process

Rationale for Engaging in Benchmarking

5.1 In all phases of the Programme, the opportunity for active reflection on e-learning processes, provision and practice in institutions was a major element in the rationale for benchmarking. Participants were keen to explore the extent to which e-learning approaches are embedded in systems and processes across the institution. The role of the exercise as a support for strategic planning was identified as increasingly important through the Programme. In Phase 2, several institutions noted that the exercise was taking place at a particularly appropriate time for their institution to instigate a more strategic approach to the use of technology.

5.2 A further key driver for participation was the desire to test institutional perceptions and measure performance in the e-learning domain in relation to the rest of the sector through rigorous and recognised processes, including both internal review and a consideration of the institution’s position alongside similar HEIs.

Methodology Choice

5.3 As experience and expertise in benchmarking grew in the sector through the Programme, institutions were increasingly informed in their choice of a methodology to suit their particular needs and context. Documentation about the different methodologies was refined and more widely available with each Phase. Institutional representatives who had been through the benchmarking process attended Town Meetings and were able to offer insights on particular approaches to their peers. Some institutions explicitly wanted to join the same cohort group as other comparable institutions in order to capitalise on existing collaborative relationships or forge new ones. The reputation and status of individual consultants also played a part in the choice of methodology for some institutions.

5.4 The sense of belonging with a particular group of institutions was a mostly tacit but significant factor in the choice of methodology. No Russell Group institutions chose Pick&Mix, mostly opting for OBHE/ACU or eMM. The former was noted as a well-established methodology with an international reputation; the latter was attractive to research-led institutions on account of its underpinning evidence base. MIT90s appealed to institutions interested in establishing a bespoke framework for strategic change. ELTI was attractive to institutions that were particularly interested from the outset in an inclusive approach to e-learning benchmarking involving various staff groups and institutional processes.

5.5 Broadly, institutions were using benchmarking in one of two ways: to ‘prove’ that they are on the right track, doing the right things in accordance with established or common practice, or to ‘improve’ their current practice through a rigorous and sometimes painful process of self-review. This distinction between ‘proving’ and ‘improving’ is relevant to definitions of formative and summative evaluation and in some ways therefore also reflects the essentially evaluative nature of benchmarking. There were indications that older, established institutions used benchmarking to confirm the appropriateness of their processes and their position in the sector, while newer institutions were more concerned with learning how to do things better.

Scope of Benchmarking

5.6 Most institutions entered the benchmarking exercise with the intention of attempting to benchmark e-learning provision across the entire institution, and some were successful in carrying out some sort of evidence gathering, analysis and reporting across all faculties, schools, departments and academic services. However, due to constraints of staffing, resources and time, several institutions narrowed the scope of their
benchmarking activities in practice to focus on selected faculties (departments, schools) or programmes in depth.

**Affordances and Benefits**

5.7 For the majority of those with responsibility for managing the benchmarking exercise on behalf of their institutions, the main benefit of participation in the exercise was its role in raising senior management awareness of e-learning. Not only had the process of active reflection stimulated strategic thinking, but had also contributed to high-level championing of technology-enhanced learning and teaching developments. Furthermore, the outcomes of the exercise provided evidence to inform further strategic planning and operational decision-making for the use of technology.

5.8 Benchmarking also served to raise the profile of e-learning among academic staff, and helped to focus reflective thinking on the changing nature of the learning and teaching process. The process also facilitated intra-institutional communication by bringing key stakeholders together, forging relations between previously disparate groups and services.

5.9 Participating in benchmarking highlighted the concept of a continuous cycle of review and improvement which could be embedded in institutional review processes. In this context, the adoption of a set of 'measures of success' based on those in the HEFCE e-Learning Strategy was identified as a clear benefit from the process, particularly in establishing a commonly agreed benchmark of good practice for all institutions.

5.10 The benefits of expert consultant input were consistently identified throughout the programme, particularly in raising senior managers' awareness of the scope of institutional e-learning activities, and the potential benefits of further development. Opportunities for networking and collaboration with colleagues from other institutions through e-learning benchmarking events were also highlighted as a clear benefit from participating in the exercise. Participants valued peer support through cluster meetings and workshops, including the opportunity to share experiences with other institutions in an open and honest way, without vulnerability to inspection-oriented judgment. A number of subsequent collaborative initiatives have been initiated, including institutional visits to explore areas of good practice in particular services and academic areas, publications and collaborative research projects. Benchmarking itself is also a focus for collaboration, as participants highlighted the benefits of belonging to a network of UK institutions that have taken part in this programme, and also the opportunity to become a participant in an international community of institutions that have used or are still using a particular methodology.

**Constraints and Challenges**

5.11 In all the phases of the exercise, participants consistently identified time and timescales as a major challenge. This was particularly problematic in Phase 2, where already constrained timescales were compounded by a start-up phase that coincided with the summer months. However, it was generally appreciated that the rigorous timetable that was required at programme level (the administrative need for completion of all phases of benchmarking and Pathfinder by July 2008), and supported operationally by the consultants implemented the various methodologies, served to sharpen the focus of the benchmarking activities and clarify the nature of the activities in hand.

5.12 In some cases, changing staff roles and responsibilities and organisational restructuring initiatives impacted on staff availability and motivation to engage with benchmarking. Logistical and/or cultural constraints were also identified in terms of securing sufficient representation from all the relevant departments or schools, and attracting a wide range of staff and students to contribute to focus groups and other evidence gathering processes. Some institutions commented on the practical challenge
of extracting data specifically relating to e-learning from more general reports and sources of information.

5.13 Some methodology-related issues and constraints were also identified, including the need to adapt some of the language and terminology for the UK HE context. The value of an aggregated results grid which can hide wide disparity between different programmes or departments was also questioned. There was a request for a tighter definition of some of the core criteria, and for some kind of handbook or user manual to support the benchmarking process with this methodology. The extent to which discrete benchmarking tools contain implicit assumptions about good practice in e-learning has been a subject of discussion at methodology cohort workshops and Programme meetings.

6 Commentary on the Benchmarking of e-Learning Exercise

What is Benchmarking?

6.1 There was a developing consensus across the whole programme, drawing on evidence and emerging maturity of understanding through the various phases, that the term benchmarking in this context is something of a misnomer inherited from the terms of the 2005 HEFCE Strategy for e-Learning. What has been taking place through the programme is in fact a process of institutional self-review and facilitated reflection. The exercise provided an opportunity for analysis and reflection on e-learning processes, provision and practice. While the key focus was on e-learning, the scope of the review had a broader significance for quality enhancement and continuous improvement in all aspects of learning, teaching and assessment provision. The benchmarking exercise has been widely appreciated as having been of significant benefit to the participating institutions in a number of ways.

6.2 There is a need to balance the needs and interests of individual institutions with the national comparative value of a benchmark standard. Despite continued reassurances to the contrary, some participating institutions expressed a persistent concern that the object of the exercise is to produce some kind of a league table of e-learning proficiency for the public comparison of institutions. On the other hand, some disappointment has also been expressed at the lack of a coherent set of standards or agreed good practice to which institutions may aspire or against which they can confirm their own position. It is important therefore to clarify that a league table is not a benchmark. A benchmark is a line based on aggregated scores for an agreed set of indicators, against which institutions can position themselves. This positioning can serve to identify both development needs and areas of good practice for celebration and to facilitate forward planning and strategy development. However, the establishment of the line (benchmark) requires the agreement of a set of indicators and the submission of (anonymised) data. This has not been possible through the benchmarking exercise for a number of reasons, not least the use of multiple methodologies, and variations in the criteria not just between methodologies but also from phase to phase and cohort to cohort.

6.3 That said, a significant element in the value of the exercise for participating institutions was the benchmarking that occurred at a cohort level where trust relationships were established and areas of mutual interest, shared challenges and potential solutions were raised and explored. The benchmarking exercise has therefore been characterised and to some extent driven by two important and potentially conflicting assumptions – on the one hand that the results of institutional benchmarking should remain confidential to the institution and those with whom it chooses to share, and on the other that the programme will succeed in revealing the state of e-learning across the sector. In 2008, HEFCE commissioned a review of its 2005 Strategy for e-Learning, which reported regret in some quarters that the benchmarking exercise has not been
able to provide a clear picture of the landscape of e-learning in the sector. However, the review also acknowledged the value to individual participating institutions of in-depth, candid, reflective review which relies on confidentiality and trust relationships.  

6.4 There was a very clear conclusion from the pilot that there was no case for imposing one benchmarking methodology on the sector, and several compelling reasons for offering diversity. These reasons included the relative immaturity of benchmarking methods at that time, coupled with the development of an emerging market within which it was not appropriate for the Academy and JISC to advocate or impose a single approach. Diversity of methodology was also demanded by the plurality of institutional missions and the heterogeneous and fiercely independent nature of the sector. It was noted that institutions might find different methodologies appropriate at different stages in their development, for different purposes or different contexts.

6.5 There is an emerging interest across the programme as a whole in a subject-based approach to sector-level benchmarking, with particular reference to the Subject Centres and some CETLs as both a focus for benchmarking activities and as a forum for reflecting and acting on some benchmarking outcomes and recommendations. The technology affordances in different academic disciplines has been a focus of particular interest for some participants, and may be worthy of further investigation in the sector. Institutional experience, collaborative relationships, developments in benchmarking expertise and the methodological refinement that has taken place through this exercise should provide a robust basis for discipline-based benchmarking, appropriately configured, resourced and managed.

**What is e-Learning?**

6.6 Throughout the benchmarking exercise, the extent to which it is useful to separate e-learning from mainstream learning and teaching in thinking about processes, practices and strategic planning has been a recurrent theme. e-Learning has always been a problematic term and institutions in earlier phases went to great lengths to try to define what was meant by the term in order to scope the boundaries of benchmarking. In some institutions there has been a move away from the use of terms such as e-learning and blended learning to more inclusive concepts of ‘academic innovation’. By Phase 2, most benchmarking institutions eschewed in-depth ontological discussions about the nature and scope of ‘e-learning’, and focused their attention on the use of technology to enhance learning and teaching, to support all aspects of the institution’s business, and to help to meet key challenges.

6.7 Developments in the scope and understanding of what is meant by e-learning which have taken place in the course of the benchmarking exercise are evidenced in successive strategic policy documents for UK HE. The interim review of the 2005 HEFCE Strategy for e-Learning recommended adapting the language to reflect the terms and concepts in current and projected use in the sector to describe and define the use of technology to support and enhance learning and teaching. In March 2008 HEFCW published Enhancing Learning and Teaching through Technology: a Strategy for Higher Education in Wales. There is increasing strategic recognition that technology-based solutions are integral to all aspects of the sector’s business, with particular reference to the core activities of learning, teaching and assessment.

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18 Review of the 2005 HEFCE Strategy for e-Learning, Glenaffric Ltd, May 2008 (to be published shortly on http://www.hefce.ac.uk/learning/elearning/)
19 See above
20 http://www.hefcw.ac.uk/Publications/circulars_5137.htm
Strategic Management and Development of e-Learning

6.8 For most institutions, there is consensus on the value of some sort of strategic document that focuses attention on e-learning. The extent to which it is desirable or necessary to have a discrete e-learning strategy, distinct from a general institutional learning and teaching strategies, has been the subject of some debate throughout the Programme. Some HEIs with substantial engagement in e-learning after a period of having a separate e-learning strategy have seen the strategic integration of e-learning with institutional learning and teaching strategies as a way of embedding activity. Others see a separate e-learning strategy as a way of providing focused support and widespread academic engagement.

6.9 Benchmarking has raised understanding of the need for overt senior management support for e-learning in institutions, and for strong central planning facilitating the strategic alignment of e-learning developments with other relevant institutional policies and processes. Collaborative arrangements – some facilitated or further development through benchmarking activities – have emphasised the value of open exchange and dissemination between institutions, particularly targeted at higher levels of management and strategy development. The focus on e-learning as a lens on general learning and teaching practice and policy has had significant change management implications in a number of institutions.

6.10 The exercise has highlighted the need for a better understanding of the costs of e-learning, including workload requirements and costing the time and effort required by both academic and support staff. A large element in the challenge in developing this understanding is the false premise that e-learning can somehow be isolated from other aspects of organisational activity for management purposes.

Benchmarking Scholarship

6.11 Integral to the Academy’s overall strategy in developing the benchmarking exercise were plans for the establishment of a Special Interest Group (SIG) with a scholarly focus on benchmarking e-learning. In the course of Phase 1 it became apparent that, in the main, participating institutions were more concerned with addressing the issues that benchmarking was revealing about e-learning in institutions than in developing a scholarly understanding of benchmarking methods and processes. This is not to say there was no interest in benchmarking scholarship, but that the focus of attention and dedication of available resources to practical institutional realities was of more pressing concern.

6.12 The benchmarking wiki, developed by Professor Paul Bacsich with a view to supporting a scholarly community around benchmarking e-learning in UK HE, was used as a reference source by participating institutions. Several institutions made submissions to ALT-C 2007 based on their benchmarking experiences, which were conflated into a symposium which presented a summary of the methodologies used and their affordances. However, there were few actual contributions to the wiki from participating institutions, and conference submissions and workshops have focused principally on the outcomes for institutions and plans for action rather than the methodologies used for their development.

6.13 That said, the Academy’s policy of ‘constrained diversity’ has undoubtedly served to facilitate developing understanding of benchmarking methodologies and their application. This policy has made possible the development of Pick&Mix as a methodology particularly appropriate to the needs of UK HE, and its subsequent adaptation to ELDDA, currently being used for benchmarking institutions in Wales in support of the implementation of the 2008 HEFCW Enhancing Learning and Teaching
through Technology21 strategy. It supported the implementation of the internationally recognised eMM methodology in UK HE, with attendant benefits both for participating institutions and for the New Zealand-based methodology champion in the further development and wider applicability of the approach. It provided an operational context for the implementation and further refinement of the ELTI method that was developed through a previous JISC-funded initiative, including the provision of generic resources to support the wider implementation of this approach. It provided a forum for the implementation of the MIT90s framework as an approach to benchmarking that suited the particular needs of a group of institutions, and presented opportunities for synergies and collaborations with the then nascent Scottish Benchmarking Group. Some individual participants have produced scholarly outputs focusing on benchmarking methodologies and processes22.

Communication and Community

6.14 The evaluation of the Pilot phase noted that the attempt to create a weblog culture of continuous reporting and reflection by institutional participants has been only partially successful. Through subsequent phases of the exercise the use of institutional weblogs for reflecting and reporting on benchmarking activities was patchy. It was the stated intention of the programme to encourage the participants to engage in a continuous process of reporting, commenting and reflecting on their benchmarking activity, thereby rendering the need for final reports unnecessary. Although every participating institution contributed a blog, linked from the main Academy benchmarking weblog, postings were in the main characterised more as a minimalist log of events than an open reflection on progress that would discuss issues and problems as well as achievements.

6.15 Despite the difficulties experienced in the attempt to establish a genuine community of practice in which blogging would become the norm, many of the participants expressed a change of attitude towards blogging during the pilot. An initial resistance to the idea of blogging was replaced by a quite positive view of its worth, though still tempered by the insistence that to be truly reflective about the exercise while it was in progress demanded time commitment and could potentially compromise the internal trust relationships that were essential to the success of the exercise in participating institutions. The use of blogs as the main communication medium for the programme provided a degree of consistency in the interface with the various participating institutions across the three Phases, despite the use of different blogging engines. The Academy’s benchmarking weblog presented a unified public face for the exercise and a window into the multifarious and multi-faceted benchmarking activities of the institutions. There was also a developmental aspect to the use of blogging, which is now a much more widespread and widely accepted form of social communication in 2008 than it was at the outset of the benchmarking exercise in 2005. While some of the institutional representatives remained extremely reluctant bloggers, most derived benefit both from contributing and accessing blog postings, and some developed a genuine enthusiasm and appreciation for blogging and other social networking approaches which has in turn influenced their professional practice.

6.16 The Helga social networking platform was set up in response to concerns from benchmarking projects that the Academy’s blog was ‘too public’ for private reflections and team discussions. Institutional benchmarking teams agreed in principle with the benefits of reflection and with the need for an ongoing log of experiences and findings.

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21 See above, paragraph 6.3.2
but wanted a private and confidential space in which to do this. They also agreed that some kind of public face for their activities was required (the Academy blog). Pathfinder projects also needed a private space for team communication and resource sharing. At the outset, EDSuT was also concerned to establish a means of cross-programme communication and collaboration on a thematic basis, and to provide a forum for establishing and maintaining cluster relationships.

6.17 There was some concern about potential confusion and repetition among multiple communication media (the Academy blog, Helga and the institutional benchmarking websites). Following discussion and with ensuing support from the EDSuT, however, there seemed to be general clarity about the different purposes each of these served. The main issue with Helga seems to be that as a social networking platform, the onus is on the individual to establish their own communities, or ask to join other communities. Users have to take responsibility for how they interact with the site, where they go, what resources they want to access. Using Helga also presented an opportunity actively to engage with a Web 2.0 technology for community building and engagement, which was a (direct or indirect) focus of interest for many Benchmarking and Pathfinder projects. One of the key lessons for the Programme support team has been the need constantly to encourage people to engage with online environments, to make this engagement task-oriented, and clarify its relevance to the main focus of participants’ interest and activity.

Recommendations for Future Initiatives

6.18 There is overwhelming evidence from all three phases of the exercise that institutions have drawn benefit from participating in benchmarking and found the exercise to be worthwhile and useful in a number of ways. The value of some kind of in-depth periodic review of the use of technology to enhance learning and teaching has been recognised both at an operational level and in terms of strategic planning and management in participating institutions. There was general appreciation of the role of the Academy not just in terms of the overall management of the exercise, but as an external validator and driver in developing sector buy-in, establishing impetus and helping to create a sense of community.

6.19 The support model that was implemented for benchmarking – the provision of dedicated consultants offering expertise, advice and guidance at a strategic level to help an institutional team through a structured process of scoping, data gathering, analysis, reporting and action planning – has proved to be highly successful. Throughout the programme, the role of external consultants has been consistently highlighted as a crucial factor in facilitating dialogue at different levels in the institutions about e-learning and the role of technology in changing practice, management and organisational culture. Groups of institutions collaborated with one another in a context of mutual trust and respect, developing synergies, drawing on shared experiences and collective expertise. Generic support from the EDSuT provided co-ordination, sharing good practice and emerging themes, issues and challenges across different methodologies and cohort groups. Consideration should be given to the enhancement and implementation of similar support models for future development programmes.

6.20 There is no clear evidence from the exercise in favour of any particular benchmarking methodology, or for a criterion-based or narrative-based approach. There is compelling evidence that institutions appreciate an element of choice, and that the rationale for choosing to employ a particular benchmarking methodology depends on a number of internal and external factors. Each of the approaches has served as a starting point for a developmental process, and there was a widely-expressed view in all phases of the exercise that the precise nature of the method is much less important than the general process involved in starting to ask penetrating questions about e-learning in an institution. It is important that institutions are able to employ a methodology that fits with
their own internal culture, the drivers, scope and expectations of benchmarking, and the resources available. Institutions also valued an element of choice and negotiation in the formation of methodology-based cohort groups.

6.21 The achievement of some drivers for benchmarking e-learning (for example cost reduction and retention benefits) can only be determined by explicit forms of measurement, whereas others (for example the general enhancement of teaching and learning) may be much more qualitative in outcome and difficult to determine in quantifiable terms. It follows that it might be regarded as good practice that HEIs should be clear about the key drivers for introducing e-learning and then adopt appropriate measures for indicating the extent to which the drivers are being met.

6.22 Senior managers are most likely to take notice of the benchmarking process and outcomes when these can be specifically related to QAA guidelines and the enhancement process, or the National Student Survey and other published performance information. While the availability of funding for specific initiatives helps to secure institutional involvement in developments in the use of technology, the longer-term relevance of technology implementation to strategy planning in relation to sector-level priorities is more significant to institutional managers.

6.23 It was implicit in the strategic context for the exercise that helping institutions to understand and appreciate their strengths and weaknesses in the development and provision of technology-enhanced learning and teaching should lead to a more coherent approach to e-learning development activities in the sector and hence to more effective use of development funding. The formative evaluation of the Pathfinder Programme offers early evidence of the role of benchmarking in identifying institutional development needs, then tailoring resource provision, providing implementation structures and consolidating communication channels to meet these needs. While it is too early to confirm the role of benchmarking in making better use of internal and external development funding, many institutional responses to recent JISC calls for funding in curriculum design and delivery have drawn evidence from benchmarking in support of their proposals. The longer term impact of the periodic review of e-learning (technology-enhanced learning and teaching) provision in institutions on the relevance, quality and effectiveness of innovation and developments in academic provision and practice and institutional processes should itself be monitored and reviewed on an ongoing basis.

7 The Pathfinder Programme

Pathfinder's Relationship to Benchmarking

7.1 All the Pathfinder projects express a positive benefit from having had the opportunity to carry out an internal benchmarking exercise before embarking on Pathfinder. There is a widespread agreement that the Pathfinder projects have in general been successfully tailored to each institution’s priorities and key requirements. This programme, therefore, represents a successful model for a national enhancement activity – where institutions are given expert help in understanding their own situation, in devising activity to address their needs, and in implementing the desired changes. The Pathfinder projects are best characterised as enhancement projects, where there are many different starting points, and where enhancement can involve making a very modest advance from a low base. Nevertheless, the inclusion of an institution in a programme that was advancing the state of e-learning across the sector was, in many cases, the incentive for senior management to become involved in the project.

7.2 Across the whole programme it is possible to draw conclusions about the outcomes of the institutional benchmarking from the nature of the development work that the Pathfinder projects have undertaken. The overall picture is one of internal
consolidation, widening involvement, and raising awareness, rather than innovation. This suggests that institutional benchmarking involves an inevitable bias towards levelling-up, dealing with perceived weaknesses rather than building further on possible strengths. In articulating a rationale for their Pathfinder approach most of the projects have referred explicitly to capacity building in areas of weakness revealed by benchmarking, rather than in areas of strength.

7.3 A subset of the projects have explicitly put in place in the institution a permanent benchmarking activity – to be carried out as a regular (yearly, for example) activity. This joins up the current enhancement initiative with internal quality procedures. Indeed, this idea should emerge from the programme as an important strategic recommendation for HEFCE. In Scotland, the enhancement themes are achieving an integration of quality procedures and development activities in learning and teaching. Of particular note at this juncture is one of the five Pathfinder Network projects led by the Institute of Education which has focused on the quality issues raised by e-learning and has attempted to initiate a wider debate, to which the QAA has contributed.

7.4 In most Pathfinder projects senior managers who had played a role in, or had taken a close interest in, benchmarking, stayed involved with the project, and have committed to some kind of follow-up activity. In some institutions, however, the Pathfinder projects have received a lower level of senior management involvement than in the benchmarking phase. In these institutions the setting up of a ‘project’ – particularly when backed by external funding – led to the responsibility for its outcomes being delegated downwards, and the activity then began to fade out of executive consciousness. In these cases the role of the Critical Friend has become central, in attempting to refocus senior manager attention on the strategic importance of addressing the issues highlighted by benchmarking.

7.5 The Pathfinder reports provide evidence of strategic issues revealed by benchmarking being taken forward in Pathfinder in a systematic way across institutions. Even in projects where there is no reference to a direct link it is clear that benchmarking started a process that has been developed further in Pathfinder. Most institutions rolled their blogs forward from benchmarking to Pathfinder. There is an opportunity now to conduct a more systematic study of the influence benchmarking had on the subsequent development activity, and the extent to which the Pathfinder projects were influenced by the programme’s emphasis on embedding. The relationship between the two activities is an important one for policy, and while we can currently assert that a majority of projects have explicitly reported that Pathfinder was based on the benchmarking outcomes, it would be valuable to be able to be more analytical about the relationship. The issue is certainly not completely straightforward since in some instances it was noted that Pathfinder encountered institutional challenges to the development of e-learning that were not exposed by benchmarking.

8 The Design and Operation of the Programme

The Design of Pathfinder

8.1 The focus for Pathfinder was stated clearly in the ITT for the Pathfinder pilots:

The focus of the Pathfinder Programme is on the design, planning, implementation, and evaluation of transformation processes and activities which are intended to lead, ultimately, to the full and effective embedding of e-learning into the learning and teaching processes of the entire institution, i.e. the aim is long term change and not just short-term innovation.

23 http://elearning.heacademy.ac.uk/weblogs/pathfinder/?p=179
8.2 The Pathfinder programme had three phases: a pilot phase that ran from October 2006 to September 2007 with nine institutions and which led into the main phase (called phase 1) in which a further 28 institutions carried out projects from May 2007 to the end of June 2008. Five of the original pilot projects were awarded additional funding to develop ‘network’ projects which ran from January to the end of July 2008. Entry to phase 1 of the Pathfinder Programme was competitive. Twenty-eight institutions who had undertaken a Phase 1 benchmarking exercise were selected for entry. Grants ranging from £23,000 to £170,000 were awarded. The selection of network projects was also competitive.

**Steering Groups**

8.3 Each project was expected to set up a Steering Group, with senior manager involvement. The main function of some Steering Groups was to review and approve documentation, but others had a more reflective, visioning and developmental role. The projects were asked to include the Critical Friend as a member of the Steering group and a majority of projects did so. Critical Friends reported a very variable set of approaches here, ranging from a formal standing item on a CETL Steering Committee or even on an institutional Learning and Teaching Committee, to a completely informal meeting in a PVC office. Most had a formal Steering Group and separate meetings of the project team, but Critical Friends reported varying levels of institutional confidence and readiness for new developments and approaches, and communicating developmental activity in an open forum.

8.4 The extent to which project reports and Steering Group minutes fed into University committees was a valid indicator of institutional interest and support. The Critical Friends worked hard in some institutions to counteract a tendency to view the project as peripheral to mainstream institutional activity. This was most noticeable where the operation of the project had been delegated to support staff level.

**The Programme Events**

8.5 At both stages of the Pathfinder programme there was a start-up event, a progress-reporting event roughly half-way through the year, and a closing event. Each project was encouraged to send at least three participants. The pilots continued to attend during phase 1, increasingly playing a programme-wide mentoring role. During Phase 1 the events were primarily organised around opportunities for the clusters to reinforce their joint activity. There was a good professional level of support from the Academy in the organising and running of the events, and the Academy’s programme leader, Derek Morrison, used each occasion to re-emphasise the overall aims of the programme. Representatives of external stakeholders (eg, QAA, DIUS) attended the close-of-programme event on 26 June 2008. The Pathfinder events were designed bearing in mind the feedback from programme events during the benchmarking pilot, that they were too ‘presentation-heavy’.

8.6 One innovation that was tried with mixed success was the ‘carousel’ approach, where participants moved quite rapidly around various ‘presenters’ who engaged in informal discussion. This proved very effective when used to orient institutions considering whether or not to join the benchmarking exercise. At the Phase 1 start-up event a ‘reverse carousel’ was tried, where the cluster groups stayed in one room and were visited in turn by the newly introduced Critical Friends and other potential support agencies, such as JISC InfoNet, JISC Legal, and an Academy staff development expert. Feedback from this experiment was less positive (the ‘experts’ were not regarded as having been appropriately briefed, and the cluster teams found

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24 [http://elearning.heacademy.ac.uk/weblogs/pathfinder/?p=159](http://elearning.heacademy.ac.uk/weblogs/pathfinder/?p=159)
themselves giving repeated mini-presentations) and this approach was not attempted again.

**The Pathfinder Weblog**

8.7 A weblog site had been developed for the benchmarking pilot, and an attempt had been made to create a culture of blogging across the programme. This had met with only limited success during the benchmarking pilot, but it was accepted by the Pathfinder pilots that they would continue with this approach and each set up a blog that was linked to the Academy site. This was continued for Phase 1 projects. The Pathfinder site essentially became a programme news/announcements blog, and a repository of programme documents and links to relevant resources. This fulfilled a valuable function and achieved some consistency of web interface across the whole programme. The Academy’s weblog became one of the mechanisms of public dissemination and also acted as a tool for day-to-day project communication. There was some evidence of cluster members (see 4.5) reading and commenting on each others’ blogs within a cluster, but not more widely. While Phase 1 projects in general continued a low level of engagement with blogging, there were a few exceptions, such as De Montfort, whose blog site was a model of how real value can be added to a project through reflection and continuous sharing through blogging.

**Clustering the Projects**

8.8 A conclusion from the pilot phase of Pathfinder was the need to encourage more of a ‘sharing’ culture in Phase 1, a response to the interest expressed by some of the projects for the opportunity to exchange views with other Pathfinder projects. However, this seemed to be restricted to those who had shared the benchmarking experience using the OBHE method, and it is worth noting that almost no-one took the opportunity to use the blogs to comment on, or ask questions about, each others’ projects. The CAMEL25 (Collaborative Approaches to the Management of e-Learning) project, at that point recently published, offered a suitable model. CAMEL was funded by the HEFCE Leadership, Governance and Management programme. It set out to explore how institutions who were making effective use of e-learning and who were collaborating in regional lifelong learning partnerships might be able to learn from each other in a Community of Practice based around study visits to each of the partner institutions. Consequently, it was decided that Phase 1 of Pathfinder would be structured into seven clusters of four institutions each. The clusters were agreed by the projects at the Phase 1 start-up event in York in May 2007, where Seb Schmoller of ALT, who had been the originator of the CAMEL idea, introduced the origins and assumptions behind the approach. Additional funding to each project was allocated at this point to cover the costs of hosting a cluster meeting at each institution.

8.9 It should be noted that these CAMEL collaborations were essentially informal meetings held under the Chatham House Rule, rather than in any sense constituting a consortium. One Critical Friend noted that development initiatives in UK and other countries have often tended to assume that a consortium approach is the best way to secure transformational change, but this is rarely the case. The more partners there are the less evident is the footprint in the individual institutions. In CAMEL, however, the impact should be evident from mutual encouragement, a sense of confidence, and enhanced learning of the project members themselves.

25 http://www.jiscinfonet.ac.uk/publications/info/camel-publication
Configuring the Clusters

8.10 The seven clusters and their Critical Friends were quite carefully configured, taking account of thematic focus, existing affinities, institutional types, geographical location and specific requests from projects. Some, but not always all, of these factors were able to be addressed in each cluster. However, the rationale for the groupings was not explained as clearly as it could have been and there was initially a view expressed by a number of projects that their cluster was not particularly well matched. However, these misgivings quickly faded as the clusters took ownership of their group activities. Meetings were often focused on a particular project theme, with one project taking the lead. The February 2008 Programme meeting appears to have been instrumental in reassuring any remaining institutions with residual concerns, and also for confirming the value of collaboration to those cluster that were already working well together.

Operating the Clusters

8.11 Almost every project reported some benefit from working in some kind of partnership relation with the other institutions in their cluster. Each cluster developed its own style of working. Some clusters ran cluster meetings ‘impeccably’ along recognised CAMEL lines. Some project representatives visited one another on an individual basis outside formal cluster meetings to progress areas of common interest. Some clusters developed peer research networks, and are producing joint conference submissions and publications. These groups include both traditionally research-led institutions and others with a much less developed tradition of scholarship. One cluster arranged that each project Steering Group meeting was attended by a representative from another project in the cluster. Another has established peer evaluation pairings. Clusters developed various communication methods. A few used Helga, the Elgg social networking site maintained by Glenaffric (part of EDSuT), although most developed alternative methods, including their own communication platform, eg using wikis. Project teams in development programmes are in a learning situation. Like many learners they develop their own communication methods and platforms in preference to those provided for them. This is as true of Helga and the Academy’s weblog as it is of course blogs and e-portfolio systems in institutions.

Sustaining the Clusters beyond the Programme

8.12 Some clusters very quickly overcame their initial misgivings to develop a model for collaboration which has in turn generated a clear will and intention to continue working together. Several clusters have firm intentions to continue their collaboration. Relationships have developed at different levels across institutions (learning technologists, academics, quality managers, staff development managers). The extent to which these intentions are met will depend on maintaining a clear purpose for the collaboration.

9. Reporting

Projects were asked to produce:

Final Project Report

Each project was required to produce a final report for the Academy as a ‘sign-off’ on the grant-funded phase of the project work. Although submitted at the end of the Academy-funded phase of project activities, this report was intended to reflect the declared aim of Pathfinder to instigate or continue some form of transformation in the institutions, and reinforce the point that projects have a timeline that extends beyond the Academy funded period. In that respect it was both a ‘completion’ report on the
funded phase of the project and a ‘progress’ report on the ongoing transformational activity in the project institutions.

The ‘Pathfinder Journey’

A complementary, reflective, outward facing report for the sector was requested. This was intended to relate the journey (tell the story) of the project in an engaging, interesting and thought-provoking way.

Briefing Papers

Each project was asked to produce at least one briefing paper on a theme or area of specific project focus. This was aimed at describing some lessons or recommendations for a defined audience (eg senior managers, academic teaching staff, IT services, staff developers). Templates for these reports were produced by the EDSuT.

10. Critical Friends

Selecting the Critical Friends

10.1 The selection of Critical Friends was a key success factor for the programme. Their seniority and recognised position in the sector has enhanced perceptions of the role and its acceptance in projects and institutions. Newly recruited to the programme for phase 1 were Professor Betty Collis, Professor Grainne Conole, and Andrew Comrie. Consultants from the benchmarking phase, Professor Paul Bacsich, Cliff Wragg and Professor Peter Chatterton were invited to continue with the programme in the new role of Critical Friend. Professor Terry Mayes (team leader of the EDSuT) also became a Critical Friend (this was not entirely desirable from the point of view of clarity of role, but the cluster for whom he acted as Critical Friend seemed readily to accept that he was acting in different roles across the programme). The idea of clustering into CAMEL groups clearly suggested that one Critical Friend should be allocated to each cluster.

The Practice of being a Critical Friend

10.2 Development of a trust relationship was crucial to the success of the role, both at the level of personal confidante and at a strategic level in institutions. Critical Friends had to work hard to make contact with key people in the organisation to raise the profile of the Pathfinder Programme and the institutional project. The sustainability agenda and the need for senior management buy-in were emphasised from the outset. The Critical Friends had different areas of expertise in a range of relevant areas, and each brought a slightly different perspective to the role. Some particularly encouraged academic development and research; others placed more emphasis on strategic change management and communication. An important element of the role in some cases was supporting individuals and project activities in working with organisational structures and political contexts. There is no set formula for the Critical Friend role, which can evolve and develop depending on the nature and culture of the institution, the interests and expertise and working context of project team members, and Critical Friends’ specialisms.

10.3 Some Critical Friends were more directive than others (depending on context and institutional need). The role was vital to success of some projects requiring high levels of external direction – they would have floundered and not delivered anything near what they have achieved without this support. Critical Friend activity involved directing and focusing them, challenging what they were doing, helping them to develop a new, more focused plan of action. All Critical Friends had some level of engagement with project Steering Groups. Some were heavily involved, for example instigating a series of themed Steering Group meetings to help develop understanding of the scope of Pathfinder activity. There were several occasions where the Critical Friend was able to raise the profile of the project internally by explaining how importantly it was viewed
externally. This dynamic seems important – using the strong sensitivity of an institution to its relative position in the quasi-market-driven environment of UK HE to drive change through the need to stay competitive.

**Evaluating the Critical Friend Role**

10.4 By the end of Phase 1 it was possible to assert that the concept of the Critical Friend for supporting institutional development at both a strategic and practical, operational level is proven and effective. The Programme has refined and developing the Critical Friend/mentor approach to a transferable and scalable model for programme and institutional support. Critical Friends facilitated the development of research capacity across a range of institutions and this work is helping to enhance scholarship about learning and teaching. Critical Friends helped to keep the profile of each project higher than it might otherwise have been within the institution, and acted as a resource, and a source of encouragement, for the project in a range of areas of expertise. However, as with any relationship, success cannot be guaranteed. Effectiveness in the role is very dependent on individual circumstances, and on the sensitivity of the Critical Friend to the needs of the project team, the people within it, their influence within the institution, and the investment of time that everyone can give. The external support provided by Critical Friends needs to be centrally co-ordinated and supported in itself. Collaborative methods of working among Critical Friends, sharing experiences, challenges and good practice could have been achieved to the benefit of the programme through the allocation of a higher resource to the Critical Friend role. Some Critical Friends expressed the view that the resource that was allocated was not commensurate with the levels of support that they had provided, but this was compensated by the extent to which Critical Friends found their engagement with the Programme to be stimulating and personally rewarding.

11. The Pathfinder Project Themes

11.1 As the following section reveals, the Pathfinder projects have covered a wide spectrum of approaches to building capacity in e-learning, and embedding best practice. The projects have ranged from, at one end of the spectrum, a few highly specific attempts to develop particular approaches to e-learning itself, or a particular approach to institutional procedures, to the majority who have taken a range of approaches to the development and empowering of staff in e-pedagogy, or who have constructed new pathways for communication and influence, or who have targeted course redesign as a key opportunity. At the other end of the Pathfinder dimension lie a number of attempts to understand more deeply the nature of the changing student experience of e-learning, and to begin to grapple with some of the challenges such understanding brings to institutional policy.

11.2 The following are some of the broad themes that emerge across the Pathfinder spectrum.

**Embedding into course redesign**
Taking curriculum or course-redesign as a key opportunity for the e-learning specialists to enter into dialogue with subject-based staff. To construct staff development opportunities that are timely (responding to an acknowledged need) and which introduce subject teaching teams to new opportunities for innovative pedagogies.

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26: Links to all reports and project blogs are available at http://elearning.heacademy.ac.uk/weblogs/pathfinder/
Embedding into decision-making structures

Setting up a permanent infrastructure for pedagogy-influencing relationships to be built and developed. This usually involves representing e-learning relationships within a committee structure, and thus, ultimately sustaining them within quality procedures.

Embedding e-learning into wider policy

Using the opportunity afforded by institutional policy not aimed specifically at e-learning, e.g. partnership building with FE, new lecturer training etc.

Focus on the student experience

Within the pilots there was comparatively little focus directly on the student experience or learning outcomes. In Phase 1, however, starting a year later, there was a clear strand of activity that was starting to investigate the potential for Web 2.0 approaches (particularly wikis, social networking and podcasting), and another that was attempting to understand the way in which students are using these tools.

Inter-institution collaboration

The five Network projects represent the programme’s clearest examples of capacity building. Each has succeeded in recruiting wide participation across the sector in taking forward the topics of:

- quality and e-learning (PREEL 2 led by the Institute of Education)
- intensive course redesign events (CABLE Transfer led by the University of Hertfordshire, and Carpe Diem led by the University of Leicester)
- podcasting (PPP, led by the University of Chester)
- researching the student experience (ELESIG led by Oxford Brookes University)

Summary of themes and dimensions across Pathfinder

11.3 Appendix B provides a summary of each individual Pathfinder project. The following table of themes (areas of activity or main focus) and dimensions (perspectives on the activity) represents a way of capturing the main categories of outputs from the programme.

<table>
<thead>
<tr>
<th>Themes</th>
<th>Dimensions</th>
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<tbody>
<tr>
<td>Quality management, audit,</td>
<td>Sustainability and embedding</td>
</tr>
<tr>
<td>audit, enhancement</td>
<td>Strategy and policy</td>
</tr>
<tr>
<td>Staff empowerment</td>
<td>Communication, collaboration and sharing</td>
</tr>
<tr>
<td>Organisational change</td>
<td>Capacity enhancement</td>
</tr>
<tr>
<td>Web 2.0</td>
<td>Building on benchmarking</td>
</tr>
<tr>
<td>Mobile technologies, podcasting</td>
<td>Outputs, outcomes and benefits realisation</td>
</tr>
<tr>
<td>Course redesign</td>
<td></td>
</tr>
<tr>
<td>Learner engagement</td>
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</tbody>
</table>

12. Key Messages from the Programme

The review concludes with the following high-level points about the overall programme.

Building relationships: transforming people rather than technology innovation

12.1 Most of the Pathfinder projects have taken very seriously the main aim of the programme – to embed existing good practice as widely as possible in the mainstream provision of the institution. In all institutions there are pockets of teaching that are positioned at the leading edge of innovation. Yet, the emphasis of the programme has tended to encourage others in the institution to embrace such methods rather than building further on the innovation. At a meta-level a majority of the projects can be characterised as aimed at building relationships, rather than at technology development. Within institutions we can view the Pathfinders as situated within a long
process of awareness raising and persuasion. In that sense several of the projects are
patiently building relationships between, on the one hand, learning technologists and
educational developers in support departments, and on the other, academics who are
designing and teaching modules. (There is also a strand of activity discernible in
several projects which is, in a social-constructivist sense, building relationships among
learners). The main theme of capacity building has been implemented as help for
people, not so much with developing strategies but with their implementation,
reconfiguring processes, rethinking traditional learning and teaching approaches,
redesigning higher level processes for learning and teaching, enabling new models to
emerge and be successfully developed.

From supply to demand

12.2 It is arguable that e-learning development is currently right on the cusp of a
fundamental shift. This sounds a surprising statement given the ‘consolidation’ theme
described above. Nevertheless, in discussion across the programme, we see an
emerging awareness that the VLE-driven approaches of recent years are increasingly
out of alignment with the changing expectations of students revealed in recent JISC
studies, and in some of the survey work carried out in the programme itself. Student
expectations will increasingly set the agenda for institutions. The VLE era has not in
general led to a culture shift in teaching methods but academics are increasingly
squeezed between the demands for a more student-centred form of teaching on the
one hand and pressures from the social networking generation of learners on the other.
One possible approach is to support moves from a supply-side view of e-learning to a
demand-side one, but whether many institutions are yet thinking in these terms, with
some huge implications for the curriculum, is doubtful. There is very little evidence yet
from the programme that institutions are moving strategically in this direction, though
some of the participants are beginning to discuss these issues more widely within their
institutions.

Building research capacity

12.3 The Institute of Education’s (IoE) project focused on a theme that reflects the special
nature of that institution, but which also represented a thread of capacity building
across the programme. This theme was the underpinning of learning and teaching by
the institution’s own research. Even for the IoE’s own internationally respected e-
pedagogy research there had previously been little impact on its own learning and
teaching. Across all the pilots, though, is recognition of the importance of positioning
Pathfinder work within a research culture. This is clearly relevant in research-intensive
universities but it also emerges as an important issue for all HEIs in the programme,
which has played a part in raising the esteem of learning and teaching researchers in
many institutions.

Sustaining the progress

12.4 The short-term funding in Pathfinder is not well matched to the need for sustainable
outcomes at an institutional level. However, it is a tribute to the success of the two-stage
model of benchmarking and Pathfinder that there are tangible signs of sustainable
change in many of the institutions, though it is too soon to make claims about the extent
of this. Some of the projects have been able to define the Pathfinder project with a two-
year duration, using matched funding from the institution to fund the second year. A
frequently expressed view is that the sustainability of the Pathfinder developments
depends, in most institutions, on the extent to which benchmarking was conducted at an
institutional level, rather than being owned by a support group responsible for e-learning.
Ownership of change: the need to engage the subject communities

12.5 A key strategic question that emerged is where to place the ownership and responsibility for development projects. Central support units have limited impact and have to expend a lot of effort to get buy-in from the academic faculties, which is where the key changes can occur. Support units can and do play important roles, but they often sit in an uneasy position between the policy-makers and the faculties. It is important to have these special units and the connection to policy, but faculties pay more attention to people who speak their language. Some element of direct funding to faculties (e.g. the University of Hertfordshire’s Change Academy approach) may have optimum impact. However, this programme has engaged those parts of the Academy that have primarily an institutional focus, through the generic learning and teaching community, and of course through the e-learning specialists. Future development programmes of this kind could usefully involve the Subject Centres, with the aim of tapping into discipline-based development communities.

Joining up the issues: challenge for the agencies as well as for the institutions

12.6 The Pathfinder Programme has served to highlight some of the benefits for the sector of collaboration between JISC and the HE Academy. The Programme has also brought clearly into focus the close relationship between e-learning developments in practice, and those procedures that directly relate to programme and module design, where the QAA have a sector-wide responsibility. The PREEL 2 network project, led by the Institute of Education, explored this relationship between e-learning and quality as its main focus, and succeeded in attracting the interest and involvement of the QAA. One achievement of the programme is certainly the highlighting of the need to bring the QAA into a more central role in enhancement (as in Scotland, where the SFC works closely with QAA Scotland on the enhancement themes). It has also been suggested that bringing the Leadership Foundation into the fold would present a coherent set of sector supports for transformation. Critical Friends have noted that at senior level in institutions there is sometimes compliance with the rhetoric of e-learning and technology-enhanced learning and teaching, with no clear evidence that this is truly understood. The experiences of Pathfinder have indicated that in many cases, PVCs are not close enough to the ground to make effective decisions about practice. There is a real need for leadership programmes at PVC and VC level, and for figures in national agencies to help them to visualise e-learning possibilities and scenario plan for the future.
### Appendix A: Benchmarking Institutions by Phase and Methodology

<table>
<thead>
<tr>
<th>Institution</th>
<th>Methodology</th>
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<tbody>
<tr>
<td><strong>Pilot: Jan - Jun 2006</strong></td>
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<tr>
<td>University of Manchester</td>
<td>eMM</td>
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<tr>
<td>University of Bristol</td>
<td>ELTI</td>
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<tr>
<td>University of Hertfordshire</td>
<td>ELTI</td>
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<tr>
<td>University of Wales Institute, Cardiff</td>
<td>ELTI</td>
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<tr>
<td>University of Strathclyde</td>
<td>MIT90s</td>
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<tr>
<td>Coventry University (with Warwickshire College)</td>
<td>OBHE/ACU</td>
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<tr>
<td>Institute of Education</td>
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<tr>
<td>University of Leicester</td>
<td>Pick&amp;Mix</td>
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<tr>
<td><strong>Phase 1: Oct 2006 - Mar 2007</strong></td>
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<td>University of Reading</td>
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</tbody>
</table>
### Appendix A: Benchmarking Institutions by Phase and Methodology

| University of Westminster         | OBHE/ACU |
| University of Wolverhampton      | OBHE/ACU |
| Canterbury Christ Church University | Pick&Mix |
| Cumbria Institute of the Arts   | Pick&Mix |
| Kingston University             | Pick&Mix |
| Ravensbourne College            | Pick&Mix |
| University of Derby             | Pick&Mix |
| University of Gloucestershire   | Pick&Mix |
| University of Teesside          | Pick&Mix |

**Phase 2: May - Dec 2007**

| The Open University             | eMM     |
| University of Leeds            | eMM     |
| University of Sheffield        | eMM     |
| University of Southampton      | eMM     |
| University of Wales, Aberystwyth | eMM     |
| University of Wales, Bangor    | eMM     |
| University of London External  | eMM     |
| Glasgow Caledonian University  | OBHE/ACU |
| Goldsmiths College             | OBHE/ACU |
| Leeds Metropolitan University  | OBHE/ACU |
| Newman College                 | OBHE/ACU |
| Queen's University Belfast     | OBHE/ACU |
| Sheffield Hallam University    | OBHE/ACU |
| St Martin's College            | OBHE/ACU |
| University of Bath             | OBHE/ACU |
| University of Portsmouth       | OBHE/ACU |
| University of Wales, Lampeter  | OBHE/ACU |
| Anglia Ruskin University       | Pick&Mix |
| St Mary's College              | Pick&Mix |
| University College Falmouth    | Pick&Mix |
| University College for the Creative Arts | Pick&Mix |
| University of Bolton           | Pick&Mix |
| University of Chichester       | Pick&Mix |
| University of Northumbria at Newcastle | Pick&Mix |
| University of Salford          | Pick&Mix |
| University of Wales, Newport   | Pick&Mix |
| University of Worcester        | Pick&Mix |
### UNIVERSITY OF BRISTOL

**KEY FEATURES**

Benchmarking recognised need for central e-learning support to make an impact on real teaching practice in the strong autonomous research-intensive Faculties. Created ‘hub and spokes’ structure through appointment of a ‘Pathfinder’ in each Faculty to facilitate e-pedagogy, and the creation of a cross-institution e-learning network.

**INDICATORS**

- Hub and spokes structure in place.

**BRIEFING PAPER**

Embedding e-learning in the disciplinary context at research-led universities.

### UNIVERSITY OF CHESTER

**KEY FEATURES**

Benchmarking confirmed value of in-house VLE (IBIS). Range of development activities at both structural (E-Learning Central Support Unit created, e-learning network set up) and programme e-pedagogy level (e-learning module in staff PGCert, podcasting for student feedback). Awarded Network project: Podcasting for Pedagogical Purposes SIG.

**INDICATORS**

- New support unit in place. Evaluation measures taken of impact.
- Survey agreed to allow comparison with benchmarking data.

**BRIEFING PAPERS**

1. Influence of institutional context on e-learning policy development.
2. Chester’s E-Portfolio for Staff: Enhancing support for CPD in partner FE Colleges.

### COVENTRY UNIVERSITY/WARWICKSHIRE COLLEGE

**KEY FEATURES**

Joint project aimed at understanding the role e-learning can play in FE-HE transition, and in underpinning collaboration more generally across the sectors. Separate benchmarking revealed challenges of inter-operability and practices. Project has succeeded in defining a way forward around repository development – progress also in joint approach to student ‘transition web’ around e-portfolios, involving templates.

**INDICATORS**

- Collaboration in Curve repository development (JISC).
- Introduction of e-portfolios into Warwickshire College

**BRIEFING PAPERS**

Good practice guide to FE/HE Collaboration.

### UNIVERSITY OF HERTFORDSHIRE
### INSTITUTE OF EDUCATION

**KEY FEATURES**

‘Salutary experience’ of benchmarking led to project to create a clear connection between own research on pedagogy, and own teaching. Addressed through a review of relevant research and staff development events aimed at course redesign. Awarded Network Project to generate sector-wide SIG on relation between e-learning and quality.

**INDICATORS**

E-learning now central in the IoE’s new learning and teaching strategy.

QAA involved in Network Project.

**BRIEFING PAPERS**

1. Course Redesign

2. Linking Research and Practice

### UNIVERSITY OF LEICESTER

**KEY FEATURES**

Benchmarking identified weakness in e-pedagogy. ‘ADELIE’ project organised around two-day intensive re-design workshops (‘Carpe Diem’) with subject teams (16 course teams from 11 depts.) E-moderator courses mounted. Network project awarded (‘CHEETAH’) to extend the approach to other institutions (University of Bath, University College Falmouth, Leeds Metropolitan University, Newman University College, University of Worcester, Oxford Brookes University).

**INDICATORS**

CHEETAH symposium indicated emergence of wider community around Carpe Diem. Collaboration with Oxford Brookes, and
informally with other Pathfinders, to share and improve methodology.


Evaluation data on impact due.

**BRIEFING PAPERS**

1: E-tivity Designs for Learning

2: Changes in Teaching Practices

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**UNIVERSITY OF MANCHESTER**

**KEY FEATURES**

e-Change project focused on development of eMM framework for driving change in newly merged complex institution. Six use cases across subject areas, involving ‘change team’ and process models. Reference model established. Extension project awarded to test and disseminate proof-of-concept Decision Support Tool aimed at supporting e-learning planners and managers in HE. Requirements captured from interviews with senior management.

**INDICATORS**

Convergence of the knowledgebase with the JISC Innovations Knowledgebase, resulting in common user interface.

ALT-C 2008 workshop

**BRIEFING PAPERS**

1: Implementing an e-repository.

2: Using eMM to support staff development.

3: Developing a Knowledge Base for Change Management.

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**OXFORD BROOKES UNIVERSITY**

**KEY FEATURES**

Focused on evaluation and evidence-informed practice, though components of the project contributed to the design of a repository architecture, and the exploration of social networking applications for reflective learning. Large scale institutional survey of student uses of technology led to the award of the ELESIG Network Project (with University of Bradford and University of Greenwich) to create a community around researching the student experience of e-learning.

**INDICATORS**

ELESIG evaluation shows high interest level across the sector and commitment by members to sustain the SIG.

Collaboration with CABLE at the University of Hertfordshire, and Carpe Diem at the University of Leicester, to produce evidence-based common approach to intensive course redesign.

**BRIEFING PAPERS**

1: Technology, Applications and Organisation (TAO) for Learning.
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| **KEY FEATURES** | Benchmarking highlighted, along with many strengths, some weakness in coordinating the different support services involved in e-learning, and dissemination of good practice between academic areas. Project addressed this by attempting a multi-service approach, re-focused on academic departments. Range of development projects coordinated across Faculties. WELA (Warwick e-learning award) offered free to other institutions, and e-learning Showcase days and Faculty e-learning lunches organised. |
| **INDICATORS** | Project coordinated from Teaching Quality office. Participated in International Benchmarking exercise with the Observatory on Borderless Higher Education (OBHE). Embedding E-Learning (EEL) Challenge Fund supported. ‘Teaching Grid’ – part of high profile Library Remodelling, giving physical space for support and advice. |
| **BRIEFING PAPERS** | 1: E-learning Showcase Day. 2: Teaching Quality and Pathfinder. |
PATHFINDER PHASE ONE PROJECTS

CLUSTER A (Critical Friend: Paul Bacsich)

UNIVERSITY OF BRADFORD

| KEY FEATURES | Benchmarking fed into development of coherent e-strategy. Unique student profile led to e-learning focus on the 'extended student' – pre-entry and for first year. E-learning integrated into coordinated support – materials development, survey of student needs, support for e-assessment. |
| INDICATORS | Member of ELESIG consortium. Institutional Exemplar for JISC thin client (e-assessment). |
| BRIEFING PAPERS | 1: Developing the Model of the Extended Student: How using an institutional skills and personal reflective activity can support the process of transition and help students create a meaningful Personal Development Plan.  
2: Summative Online Assessment: Lessons Learned and Recommendations. |

UNIVERSITY OF BRIGHTON

| KEY FEATURES | Benchmarking revealed leading-edge integrated technical environment (studentcentral; Community@Brighton) not well used pedagogically. Staff development focus requiring integration of technical and pedagogical support. Intensive workshops for course teams. Particular emphasis on social networking. |
| INDICATORS | University new Learning and Teaching strategy specifically commits to sustain the approach. |
| BRIEFING PAPERS | None submitted. |

UNIVERSITY OF GREENWICH

<p>| KEY FEATURES | Student experience of e-learning laboratory (SEEL). Project has collected data from a range of methods investigating the student experience of e-learning and has disseminated early findings widely through a range of workshops and case studies. Impact on learning and teaching policy. |
| INDICATORS | Partner in ELESIG. Host of ELESIG symposium, as part of |</p>
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<th><strong>THAMES VALLEY UNIVERSITY</strong></th>
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| **KEY FEATURES** | Benchmarking revealed initially low level of e-learning use. [R]elearn Project designed to kick-start major initiative in embedding sustainable staff development and technical support in all academic areas. E-Learning support posts (ELTs) created. Drop-in surgery approach devised. Impact difficult to assess as confounded with major restructuring. |
| **INDICATORS** | University policy paper emerged: *Mainstreaming Blended Learning*. ELT appointments continued through internal funding. |
| **BRIEFING PAPERS** | None submitted. |
BOURNEMOUTH UNIVERSITY

**KEY FEATURES**
The eRes project focuses specifically on engaging learners to use quality e-resources in e-learning activities using Web 2.0 technologies within the VLE. Learning technologists, librarians and staff developers provided joint support for academics in 12 case studies.

**INDICATORS**
eRes SIG created. Project has already generated 10 publications and 13 conference presentations.

**BRIEFING PAPERS**
1: e-Res: Innovative Learning with e-Resources  
2: e-Res: Reading Strategies in the Digital Environment  
3: e-Res: Support Needs  
4: Role of the Learning Technologist

COLLEGE OF ST MARK & ST JOHN

**KEY FEATURES**
Benchmarking highlighted need for specific e-learning goals in the Learning and Teaching Strategy. Survey of staff and student needs. New e-learning support service created.

Project focuses on exploiting the agreed ‘universal student access to a laptop’.

**INDICATORS**
New institutional e-learning strategy produced, approved by Learning and Teaching Committee. Contains metrics for measuring progress.

High level of interest in the ‘Guild HE’ sector at events.

**BRIEFING PAPERS**
1: Development of RLOs. 2: Staff & student support.

UNIVERSITY OF GLOUCESTERSHIRE

**KEY FEATURES**
Modestly-funded, narrowly-focused project on exploring the potential for reflection, learning and assessment of digital storytelling. Copyright, assessment and ethical issues highlighted. Workshops delivered.

**INDICATORS**
Held 2-day conference on digital storytelling.

**BRIEFING PAPERS**
1: Emerging Pedagogies 2: The Learner Voice
**UNIVERSITY OF KEELE**

| **KEY FEATURES** | Benchmarking had revealed unease concerning the status and use of digital resources. Project explored issues around the development of a digital repository linked with an existing VLE. ‘Proof of concept’ study around digital resources, metadata and embedding the resultant new practices across the university. Encouraging subject teaching staff in the purposeful use and re-use of the resources. |
| **INDICATORS** | By end of project 70 course modules were accessing 350 scanned resources. Exemplars of good practice for staff use. University has committed to continued funding to sustain the work started in the project. |
| **BRIEFING PAPERS** | Briefing Notes for the IntraLibrary Repository from Intrallect: A Technical Perspective. |
### LONDON SOUTH BANK UNIVERSITY

**KEY FEATURES**
Detailed development and implementation of ICT Literacy benchmarks. The Compass project focussed on the identification and development of academic staff skills with the benchmarks, mapped to staff roles. Staff ITC survey conducted and ICT course designed. 3 Carpe Diem workshops delivered.

**INDICATORS**
- London South Bank University (LSBU) and University of Northampton to facilitate Carpe Diem workshops in each others’ institutions.
- Partner in JISC Curriculum Design Project, generated by Cluster C and the OU.
- EdMedia symposium and ALT-C workshop by Cluster C.

**BRIEFING PAPERS**
Seize the team: engaging academics in the process of developing material for online delivery using the Carpe Diem methodology.

### UNIVERSITY OF READING

**KEY FEATURES**
The ‘DIRECT’ project developed an approach to transform its institutional quality management processes. A framework for institutional change developed. 4 Depts across 3 Schools piloted new framework, involving tools, templates, staff development workshops. Partner in QA/QE SIG Network Project.

**INDICATORS**
- New framework incorporated into University Periodic Review QA procedure.
- 2 Pathfinder Posts extended for 15 months with University funding.
- Partner in JISC Curriculum Design Project, generated by Cluster C and the OU.
- CABLE Transfer event planned for September 2008.
- EdMedia symposium and ALT-C workshop by Cluster C.

**BRIEFING PAPERS**
1: Raising awareness of the costs of e-Learning.
2: Getting the most out of adopting a cluster approach: synergies and collaboration.
3: A framework to enable quality management and enhancement.
## BRUNEL UNIVERSITY

| **KEY FEATURES** | Project gathered information on emergent e-pedagogical practices within Schools. An ‘Appreciative Inquiry’ (AI) was conducted within 4 Schools. The generated local evidence-base is used to inform a change management programme with Schools. |
| **INDICATORS** | Remaining Schools committed to completing the process. |
|               | Partner in JISC Curriculum Design Project, generated by Cluster C and the OU. |
|               | EdMedia symposium and ALT-C workshop by Cluster C. |
| **BRIEFING PAPERS** | 1: The implementation of Appreciative Inquiry (AI) to gain ‘buy-in’ from academic staff for improved e-learning practices. |
|               | 2: Using a Personal Response System (PRS) for Teaching & Learning in Higher Education. |
|               | 3: Educational Considerations for Blended Learning. |

## UNIVERSITY OF CAMBRIDGE

| **KEY FEATURES** | The Learning Landscape Project (LLP) has gathered data from staff, students alumni and providers of learning support across the collegiate university, analysing their perspectives on a range of key issues related to teaching and learning. This has led to the identification of ‘clusters’ of practice and patterns of innovation that will inform future collaboration and development. Developed an innovative online evidence base to inform the University’s Learning and Teaching Strategy. |
| **INDICATORS** | Informing a major TQEF funded initiative on supporting the development of transferable skills across Undergraduate courses. |
|               | Partner in JISC Curriculum Design Project, generated by Cluster C and the OU. |
|               | EdMedia symposium and ALT-C workshop by Cluster C. |
| **BRIEFING PAPERS** | 1: Research Methods: Case Records. |
|               | 2: Research Methods: Movers and shakers focus group. |
|               | 3: Research Methods: Coffee meeting interviews. |
|               | 4: Research Methods: Project steering group. |
### EDGE HILL UNIVERSITY

**KEY FEATURES**
The project focus on e-learning in partnership delivery arrangements and off-campus locations emerged from e-Benchmarking. Range of interventions, informed by the approach of the SOLSTICE CETL around ‘new academic teams’. Developed guidance materials and workshops for professional development in off campus e-learning development. Also metrics for costing e-learning. Online modules for student induction to e-learning. Audit tool for off-campus.

**INDICATORS**
- Learning Services audit procedures now include off-campus provision.
- E-learning strategy manager has brief to work across FE partners.

**BRIEFING PAPERS**
- Raising awareness of the costs of e-Learning.

### DE MONTFORT UNIVERSITY (DMU)

**KEY FEATURES**
Overarching aim for the DMU Pathfinder was to develop a read/write culture across the university. Project focused upon: engaging university leaders and managers, and PGCertHE practitioners, with Web 2.0 tools; enhancing professional development opportunities for support and academic-related staff; podcasting; evaluating read/write tools to support retention and progression. Project led by example in the use of read/write technologies.

**INDICATORS**
- Dept of Academic Quality and the e-Learning Coordinators have created a network of 52 local champions. DMU SIGs created on podcasting, games for learning, support staff, e-assessment.
- Project nominated by DMU for the national ICT Initiative of the Year Award (THE).
- Partnership arrangement with DMU Students’ Union Executive for continuing Pathfinder developments around student use of technologies.

**BRIEFING PAPERS**
1: Podcast.
2: The impact of read/write web technologies and approaches on Professional Development: a briefing for Professional Developers.
3: The impact of read/write web technologies and approaches on academic-related staff: a briefing for academic-related managers.
### MANCHESTER METROPOLITAN UNIVERSITY

| **KEY FEATURES** | Benchmarking revealed lack of Intra-institutional collaboration in e-learning development. Development of institution-wide strategies for Faculties and Departments to increase collaborative e-learning design, development and use/re-use. Evaluating infrastructure to support Podcasting and the dissemination of “good practice” via a repository of 12 case studies. Cross-institutional CoPs set up. Independent formative evaluation team fed recommendations for change to the team and to senior management. |
| **INDICATORS** | Critical Friend and the Pathfinder Team invited to meet University Directorate in July 2008. VC gave undertaking to continue to support what the project had initiated. |
| **BRIEFING PAPERS** | 1: Projects and Institutions: working together for a change.  
2: Developing communities of academic practice. |

### UNIVERSITY OF CENTRAL LANCASHIRE

| **KEY FEATURES** | Benchmarking revealed need for blending of VLE use with more open, student orientated platforms. Project explored the use of institutional-based online social networking to support student engagement. Also focused on online orientation and support materials for students about e-learning tools and resources. New options trialled for staff development for e-learning, to explore the nature of disciplinary differences in approaches to e-learning. Case studies and exemplars of e-learning practice within disciplines (20 studies produced). Investigated viability of online peer network for off-campus liaison. |
| **INDICATORS** | Project will continue for further year with internal funding. |
| **BRIEFING PAPERS** | {pending} |
### UNIVERSITY OF DERBY

| **KEY FEATURES** | The project has established the Flexible Learning Network to coordinate an enhancement programme across a number of strands of activity in staff development and support, technical issues, quality assurance, course design and pedagogic research. The FLN facilitates cross-institution coordination and the e-learning Teaching Fellow scheme expanded through the project. Work underway with the QE Dept to embed TEL in the review of QA procedures. Staff development needs analysis tool delivered to Faculties. Project participated in Network Project PREEL 2. |
| **INDICATORS** | FLN produced Communication Strategy and Plan for TEL. |
| **BRIEFING PAPERS** | Developing and implementing a communication strategy for Technology Enhanced Learning, a vehicle to promote academic engagement. |

### UNIVERSITY OF TEESIDE

| **KEY FEATURES** | Project focused on E-Quality based on Benchmarking outcomes. The main institutional benefits were the development of explicit quality processes and procedures for e-learning and the development of an institution-wide approach to supporting and enhancing the student experience. These included minimum standards, diagnostic tools and sharing of good practice, including staff development activities. Analysis of students’ experiences and needs informed changes to practice including enhanced online pre-induction support, increased student involvement in e-learning design, and the development and trialling of new learning technologies. Outputs include a threshold standard for VLE use, a range of support materials for staff including guidelines and diagnostic/audit tools. Partner in Preel2 Network project. Hosted one of the Quality A/E in E-learning workshops. |
| **INDICATORS** | A new peer review scheme for teaching and learning has been developed including guidelines and procedures for peer review of both face-to-face and online teaching activities. This will be implemented for all academic staff from September 2008. Learning and Teaching team in CLQE are developing programme design workshops based on recommendations produced by the Pathfinder project. These will be rolled out to Schools from the start of the new academic year for targeted programmes due for revalidation or review. |
| **BRIEFING PAPERS** | Students’ E-learning Experiences and Expectations. |
## UNIVERSITY OF EAST LONDON (UEL)

| KEY FEATURES | The UEL DEEP Pathfinder project arose from Benchmarking where the need for a comprehensive e-learning staff development portfolio was identified. This has been designed and implemented. It includes a detailed staff development needs analysis tool, a suite of activities and exercises for change management among staff and a portfolio of case studies of good e-learning practice within the university. The project has also facilitated the development of internal and external communication strategies to support e-learning. Have run CABLE workshops through collaboration with the Blended Learning Unit CETL (BLU) at the University of Hertfordshire. |
| INDICATORS | E-learning benchmarking exercise to be run as a sustainable activity. |
| BRIEFING PAPERS | Routes to Success: Finding the UEL Path through Staff Development. |

## UNIVERSITY OF SUNDERLAND

| KEY FEATURES | A major outcome from benchmarking exercise was identifying that some academic and learning support staff had a skills gap in being able to use e-learning appropriately. The pathfinder project used the existing HE Academy Professional Standards Framework (PSF), areas of activity and professional values to design, plan, implement and evaluate criteria for the effective use of e-learning in a formal programme of study for new staff and in staff development for existing staff: output is a new PSF for e-learning and a transferable staff development plan. |
| INDICATORS | University-level new Technologies for Learning Group set up. University task group created to look at legal issues around social networking tools. |
| BRIEFING PAPERS | 1: Professional Standards Framework for Teaching and Supporting e-Learning in Higher Education Example for Standard Descriptor 3  
2: Professional Standards Framework for Teaching and Supporting e-Learning in Higher Education Example for Standard Descriptor 1/2 |
**Kingston University**

**Key Features**

Specific aim of Kingston’s project is to conduct research on the in-classroom use of mobile technologies to support diagnostic and formative assessment. The mobile technologies used were Electronic Voting Systems, Tablet PC’s, Interactive tablets, i-pods and Mobile phones. Thirteen academic staff members from 7 different faculties used mobile technologies in the classroom for formative assessment purposes and to provide rapid feedback to students on their knowledge and understanding. Eleven successfully implemented mobile technologies in their classroom and plan to keep using the technologies in the next academic year. The use of a staff mentor approach to introducing new approaches to learning and teaching has been successful. Mentors have been available to support staff prior and even during lectures. Their support has been very appreciated by the participants. Preliminary analysis of the student evaluation data indicates a very positive response from students.

**Indicators**

Seven conference presentations on the research already given, or accepted.

**Briefing Papers**

1: Using mobile technologies to enhance student engagement and collaboration in the classroom.

2: Using a Staff Mentoring Scheme to Embed New Learning Technologies.

3: Strategies for the effective and appropriate implementation of electronic voting systems in the classroom.

**University of Exeter**

**Key Features**

Exeter has an extensive history of using video and conferencing technologies (VC) for teaching and learning. With the launch of the Peninsula Medical School in 2002, and the University’s Cornwall campus over 100 miles away in 2004, Exeter’s portfolio of programmes expanded rapidly, with VC being used to build cross-campus capacity in several disciplines. The Pathfinder project has gathered data on which to base a review of VC practices and procedures and has developed a staff development workshop for teachers new to VC, grounded in research and evaluation. By evaluating current practice and assessing the impact of VC on students and staff, Pathfinder has informed inter-campus strategy and curriculum development, and the long-term development of VC infrastructure within the University.
### Appendix B: Pathfinder Projects by Institution

#### UNIVERSITY OF WOLVERHAMPTON

| KEY FEATURES | Project aimed to embed the use of ePDP activities into the Level 1 curriculum of two modules from each of the 10 Schools. The chosen methodology was to use ePDP peer mentors to support Level 1 tutors in their planning, design, use and assessment of integrated ePDP tasks. Staff development in support of the mentor role and for tutors implementing ePDP was brokered through a series of three away-day retreats following a developmental role of mentoring. Nine staff carried out their role as an ePDP mentor and nineteen staff integrated a variety of ePDP tasks aimed at different aspects of PDP into their curriculum. 1810 Level 1 students engaged with these ePDP tasks in a range of subjects. Modules ranged from groups of 15 to the largest module with 350 registered students. The project was important to the institution to move past ‘champions’ and early adopters of the ePortfolio tool to build personal capability in staff and institutional capacity to increase the quality and amount of PDP activities in the level 1 curriculum. |
| INDICATORS | The use of ePDP has been incorporated as a distinct strand of the University’s new Blended Learning Strategy. Successful bid to University Executive to approve that ePDP mentors can be funded at a 0.2 level in each School. |
| BRIEFING PAPERS | 1: Emerging pedagogies using webcams, podcasting and YouTube in eportfolio. |
| | 2: Student evaluation and the learner voice. |
| | 3: A mixed model for staff development – ePortfolio, developmental mentoring and total immersion retreats. |
| | 4: What do we mean by PDP? ePortfolio? and ePDP? |
### CANTERBURY CHRIST CHURCH UNIVERSITY

#### KEY FEATURES

The DEBUT project has piloted and evaluated a digital literacy staff development programme. Its focus stemmed from the benchmarking exercise which highlighted that despite the institutional VLE being used within nearly all academic programmes, there were only limited examples of e-learning strategies that fully exploited a range of technologies. DEBUT explored a situated approach which aimed to develop the overall digital literacy of the individual, rather than their technical skills on a particular system. From sixty applications twenty-five participants were accepted onto the project. A suite of twenty three digital experiences were captured. The DEBUT tools were supported by a variety of staff development approaches, giving the participants a range of digital experiences which had meaning for them at a time which best suited them. A range of evaluation methodologies was used to evaluate DEBUT, including the use of a digital literacy scale to provide a benchmark against which participants could position themselves.

#### INDICATORS

- Regional JISC Centre to host dissemination conference on DEBUT.
- Researcher funded to continue the project beyond the HE Academy funded period.

#### BRIEFING PAPERS

1: Mind the Gap – Bridging the digital divide: an evaluation of a staff development programme focusing on digital literacy.

2: Learning the lesson: a briefing paper for educational developers on the effectiveness of a range of different staff development strategies used within a digital literacy development programme.

3: Tools of the trade: A briefing paper for educational developers providing responses to a variety of digital tools explored and evaluated by a group of HE staff on a digital literacy development programme.
### BUCKINGHAMSHIRE NEW UNIVERSITY

**KEY FEATURES**

The project has produced enhancements in both the general and technical support provided by central services and the academic and personal support provided by the faculties for Work-Based Learning students. It makes recommendations for changes in course design and development, quality assurance internally and externally, improved marketing, improved IT set-up, improved IT induction and support, as well as redesign of enrolment processes.

Outputs include: briefing paper on support for Work Based Learning; a guide to QEC on appropriate points for course validation and review and a guide for QAA auditors to support audit of e-learning provision. The project has provided enhanced technical and general support for on-line Work Based Learning (WBL) students, as well as enhanced academic and personal support for on-line WBL students off campus. The project outputs have also informed the e-strategy aspect of the new Teaching, Learning and Assessment Strategy.

**INDICATORS**

The project outcomes will be embedded in the revised quality assurance processes for validation and review, and the new Teaching, Learning and Assessment Strategy.

Guidelines for audit endorsed by the SCONUL QA Working Group.

An enhanced reputation for supporting non-traditional students on-line, has produced student applications for next year showing dramatic growth.

UCISA and SCONUL committees will discuss the implications of the project during the coming year as the project leader is Chair of UCISA Teaching, Learning and Information Group.

**BRIEFING PAPERS**

Support for Work-Based Learning.

### UNIVERSITY OF NORTHAMPTON

**KEY FEATURES**

The BITE project has designed and developed ‘bite’ size chunks of staff development materials in e-learning. These are personalised to specific subject areas, and aimed at helping staff develop their abilities to teach more effectively using technology. The case studies and resources focus primarily on the potential benefits of e-learning and the advantages of using new and emerging technologies within teaching. BITE is embedded as part of school support modules on the existing PGCTHE.
### Appendix B: Pathfinder Projects by Institution

#### INDICATORS

A second e-learning benchmarking snapshot will take place Autumn 08 as part of an overall learning and teaching benchmarking exercise (ELBME 2) and the report from this will measure the impact of BITE in the specific schools and subject areas that have been covered as part of this project.

#### BRIEFING PAPERS

1. The Qualitative Cost of E-Learning
2. Academic engagement with e-learning in the creative arts (with University of Cumbria)

### BRADFORD COLLEGE

#### KEY FEATURES

Using Foundation Degrees, delivered through HE in FE, to identify opportunities offered by learning technologies to tie together three primary stakeholders; Employer, HE institute and learner. A conceptual model of FD development and delivery is a key output. Project is leading a re-assessment of the highly instructive approach to pedagogy that is inherent in traditional employer engagement programmes; perhaps engendering, through the use of social networking technologies, a more collaborative learning environment.

#### INDICATORS

The projects’ influence has been reflected in the e-learning policy of the college. All 58 learning resources staff have been given new roles within a staff restructure that have a clear focus on supporting e-learners.

#### BRIEFING PAPERS

1: Creating connections and peer learning: A diverse, flexible and virtual approach to staff development and collaboration between Academics and Learning Technology Support Staff.

2: A Conceptual Model for embedding e-learning in Foundation Degree delivery.

### UNIVERSITY OF CUMBRIA

#### KEY FEATURES

The EPLE (Enhancing Practice-Led E-learning for Art, Design and Media) project sought to investigate the innovative application of e-learning in creative arts disciplines by providing a foundation of training and support for academic staff. This has led to discrete findings from three subject areas, and common emergent themes. A model approach for engaging academic staff in the design of e-learning activities for creative arts disciplines has emerged out of the project. Whilst the front-line focus of the project was the investigation of innovative use of Blackboard in Journalism, Life Drawing and Photography modules, the process of working with staff in order to achieve this has been resolved as an outcome in itself. Carpe Diem Leicester workshop to be contracted.

#### INDICATORS

Plan approved by Faculty of Arts to continue the Pathfinder
Collaboration over briefing papers with the HEA Subject Centre for Art, Design and Media for dissemination to their community.

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<th>BRIEFING PAPERS</th>
<th>1: Academic engagement with e-learning in the creative arts.</th>
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<td>2: Experiences of e-learning innovation in art, design and media disciplines.</td>
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