

Higher Education Academy/JISC E-learning Benchmarking Phase 2

Overview Report

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On behalf of the Higher Education Academy

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Preamble

This document provides an overview of the general aspects of the two methodologies used by the 17 institutions in Phase Two of the Benchmarking of e-Learning Exercise which were supported by the Benchmarking of e-Learning Associates (BELA) team. Because both methodologies will each have their own reports and other methods (in particular the wiki) for dissemination of findings, it was felt that there was little need to go into detail on methodological matters in this overview report. Short reports on the two methodologies (including engagement approach) are in preparation and will be published in the near future.

There will also be a report on the sector (the part of it seen by BELA). This will contain carpets for the Pick&Mix and eMM institutions and narrative reports on the state of play of e-learning, classified against several schemes including HEFCE and HEFCW indicators. It is not yet clear whether a unified report can be done, due to a number of differences in scoring approaches and moderation between the two cohorts.

The structure of this document follows the structure of the document produced for Phase One, down to the numbering of the paragraphs. We hope that this will assist those trying to draw comparisons between phases.

Paul Bacsich, March 2008

BENCHMARKING OF E-LEARNING EXERCISE PHASE 2 OVERVIEW

As the 2006-2008 iterations of the Benchmarking of e-Learning Exercise have now all been completed (accepting that there is a small follow-on phase in Wales) the following report offers readers an overview which summarises the main conclusions that BELA draws from the seventeen institutions that they supported in Phase Two of the exercise. It focuses on general methodological matters. A separate report including “carpets” and summary conclusions as to the state of play of e-learning across the institutions, will become available in due course.

It should be noted also that this overview is *not* intended to be an evaluation of the 17 institutions in Phase Two of the exercise which were supported by BELA – the evaluation of Phase Two is being carried out (as for Phase One) by the Academy’s Evaluation and Dissemination Support Team (EDSuT). Consequently, the report is informed by close observation of and discussion with the institutions rather than specific evaluation interviews. It will not report on motivations of institutions and their staff unless these motivations were communicated to the consultants. The institutions, however, were remarkably open and informative in their assessments.

The narrative is based on the documents and weblog postings created by the institutions during Phase Two, attendance at meetings (programme-level meetings, cohort workshops, meetings with individual institutions) and other informal contacts.

The report does draw on (without specific attribution) some draft reports of institutions made available to the consultants.

The overview addresses the following areas:

1. Phase Two from the BELA standpoint
2. An outline of key variances in processes from Phase One (and where relevant, the Pilot Phase)
3. A consideration of the methodology issues: synergies, commonalities and variances
4. The level and nature of support provided, with key activities, events, and resources
5. Key challenges, issues, and resolutions
6. Value added outcomes.

1. Phase 2 from the BELA standpoint

- 1.1. Seventeen institutions were supported by BELA in Phase Two. Of these, ten used Pick&Mix and seven used eMM. (The ELTI or MIT90s methodologies did not garner sufficient support from the minimum number of institutions required by the Academy to be viable in Phase Two.)
- 1.2. All but three were English institutions; the others were Welsh universities. Of the fourteen English institutions, nine were campus-based universities, three were university colleges and two were specialist distance learning providers (the Open University and the London External Programme) – and two others were members of the Open Learning Foundation. Three were Russell Group institutions. Seven would normally be called “research-led” institutions.
- 1.3. Each of the institutions successfully set up a benchmarking team, followed one of the two methodologies, gathered data, and produced benchmarking outcomes in narrative and tabular (“carpet”) form. Anonymised versions of the carpets will be published in a separate report.
- 1.4. At the time of writing, only a few have produced public reports, but several more are expected to. Institutions have ownership of their benchmarking exercise and so any publication decision is under each participating institution’s control. However, there is a wealth of presentation material and discussion notes available to the consultants.
- 1.5. Every institution set up and ran a blog linked to the HE Academy benchmarking blog – but in some cases this took a month or two to organise. All made some postings but the number and quality of postings were highly variable. Other communication technologies have also been employed including a JISCMail list for each methodology group (which was very popular) plus a specific group communication system HELGA supplied by EDSuT (which was less accepted). The OIM system used for ELTI was not used in Phase Two – however, lessons from that are being taken into account for future systems.
- 1.6. The level of senior management involvement in Phase Two has in many cases been high (in a few cases very high), and within the institutions the profile of the benchmarking activity has been high. In most cases the consultants met the relevant Pro-vice Chancellor/Deputy Vice Chancellor and/or presented to the Senior Management Team – and in several smaller institutions they were called in to meet the Principal.
- 1.7. As in Phase One, the Phase Two institutions tell us that they value being part of a national programme and having an external consultant.
- 1.8. Each group of institutions running a specific methodology joined in methodology cohort meetings. These were held (by popular demand) four times for Pick&Mix and three times for eMM (preceded by a two-day workshop in May – and the final eMM meeting was a two-day event). In addition, on the day after the programme kick-off meeting there were briefing half-days for each methodology group – these seem to have been very successful.
- 1.9. The three Welsh institutions in the BELA cohorts did excellent jobs and made a valuable contribution to the overall programme. This has worked through into feedback to HEFCW.

2. Outline of the key variances in processes from Phase 1

- 2.1. The model from Phase One – of an individual consultant working with each institution using a single benchmarking approach – was modified for Phase Two to a system of “lead and buddy” in order to add resilience and to provide a clearer

demarcation of roles between support consultant and methodology advisor. The resilience was useful in dealing with the planned absence of one consultant on paternity leave and the unplanned absence of another during a period of illness. Nevertheless, institutions quickly “imprint” on one consultant. Despite that, the more team-based system was viewed positively by institutions. Several institutions have told BELA consultants on more than one occasion that the consultants have achieved a high level of credibility with institutions and have established good working relationships with them.

There were also some other small adjustments for Phase Two in that the methodology advisor for eMM (Dr Stephen Marshall) was brought under contract (and made a visit to the UK near the end of the project) and three specialist HEI advisors (from the Pilot Phase and Phase One) were also brought on board to provide a link back to HEI expertise in earlier phases. These modifications were popular.

- 2.2. Unlike Phase One there was no Pathfinder bidding process occurring during Phase Two to distract the institutions. The Welsh institutions, however, did have to prepare bids to HEFCW for additional funds but because this occurred after the scoring and final cohort meetings it did not appear to distract from the overall benchmarking process.
- 2.3. As in Phase Two, institutions supported by BELA were placed in methodology clusters thus gaining benefits from shared events and peer-support. Both clusters worked well. In theory both clusters were subdivided into groups (three groups for Pick&Mix, and three for eMM – Welsh, Distance Learning and Worldwide Universities Network). The Pick&Mix groups did meet together for brief periods at most cohort meetings and the eMM groups did some joint work outside the cohort meetings – but the group structure did not get in the way of full-cohort activity. Scheduling of these large meetings was, however, quite problematic and institutions were required to demonstrate mastery of cogent presentation in order to get across the range of information needed in the limited time.
- 2.4. Unlike the Pilot, but like in Phase One, the minimum cluster size was four institutions and so there were no single-institution methodologies. This further simplified matters including the reporting (it is impossible to report anonymously on one institution and is difficult even for four) and in particular has allowed a real piloting of the eMM methodology (noting that the University of Manchester played an advisory role in Phase Two for eMM).
- 2.5. The HE Academy benchmarking wiki was employed more intensively than in the Pilot or Phase One and some of the wiki postings were widely read. But, as in Phase One, there was little interest from Phase Two institutions in *contributing* to the wiki. The wiki does not keep detailed statistics so it is impossible to know *who* is reading the popular pages – however, the pages that informal thinking would suggest would be popular are the ones with the high read statistics so the statistics seem genuine.
- 2.6. The “tone” of Phase Two was much like that of Phase One (much more operational than in the Pilot) and so the emphasis on developing a scholarship of benchmarking e-learning was again less pronounced than in the Pilot. Engendering and demonstrating scholarship, however, sometimes requires more of a “slow-burn” approach and allowing time for reflection. For example, it is only now that Phase One institutions are preparing the conference presentations and journal papers that might be expected to arise from their participation in the exercise.

3. Methodology issues: synergies, commonalities and variances

3.1. Two benchmarking methodologies/tools were used across BELA Phase Two institutions:

- Pick&Mix used by ten institutions – the method developed by Paul Bacsich initially for Manchester Business School and EU projects, and used by three institutions in the Pilot and seven in Phase One
- eMM used by seven institutions – two Welsh, two distance learning and three from WUN (the Worldwide Universities Network). eMM was not used in Phase One but was used by one institution (the University of Manchester) in the Pilot Phase.

In contrast:

- ELTI was not used in Phase Two. It was used by six institutions in Phase One and three institutions in the Pilot Phase
- MIT90s was again not used in Phase Two. It was used by four institutions in Phase One, and only one institution in the Pilot Phase (and that only in a limited way). Nevertheless, the key concepts from MIT90s are now available in Pick&Mix and, as in Phase One, some Pick&Mix institutions reported against MIT90s categories and envisioned their change management in such terms. It is likely that eMM will also be tagged with MIT90s categories. In addition a more “balanced” version of MIT90s has been developed for reporting in Pick&Mix (see below).

- 3.2. While there are some high-level commonalities between the two methodologies used by BELA in Phase Two, and an increasing set of commonalities in the way that they are deployed (the so-called “engagement” aspects – slices, cohort meetings, scoring meetings etc) there are almost no commonalities at a more detailed level – and even fewer between them and the OBHE methodology. Consequently, in order to offer the sector some choice of methodology the quid pro quo in Phase One was that each methodology required its own allotment of effort for ongoing support and documentation, with each methodology having a one-off support cost in addition to the cost of supporting institutions. This quid pro quo was continued into Phase Two but the reduction to two methodologies, both now fairly mature, has allowed consultants and institutions to get more deeply into the details.
- 3.3. The support cost in Phase One was lowest for Pick&Mix because the version used in Phase One was only a small update to that used in the pilot. In Phase Two there were some more small updates at the beginning but when discussions started about a “maintenance update” to release 2.1 the cohort members strongly expressed an opinion that they did not want any more updates – not even clarifications – in mid-flight of benchmarking. Consequently the release of 2.1 was held back until Phase Two finished – these include improvements to wording and a revised set of mappings to HEFCE Measures of Success and HEFCW Indicators of Success, Balanced Scorecard, MIT90s, etc. The initial version of these mappings has been used at the end of Phase Two to produce “derived carpets” for HEFCE Measures, etc.
- 3.4. Since MIT90s was not used in Phase Two, there was no explicit update to MIT90s. However, the tagging of Pick&Mix with MIT90s proved not to be very helpful in producing a derived carpet for MIT90s and the awkward split of Pick&Mix criteria across traditional MIT90s categories proved unsuitable for reporting. Consequently some work was done (within the Pick&Mix effort envelope) to produce a so-called “balanced MIT90s” to facilitate MIT90s-based reporting of Pick&Mix results (since several institutions in Phase One had done that).

(Note that in Phase One, much work was done at the start to provide an intellectual

underpinning to MIT90s and to reconceptualise MIT90s in terms of criteria formulation and group working, since the Pilot institution had not focussed on either of these. Then each institution had to do much work to create criteria from scratch – and since MIT90s is a flexible framework with no preset criteria, that effort is required each time it runs.)

With the move in Phase Two to produce multi-institution carpets, another key flaw with MIT90s (at least in the variant actually wished for by institutions) became evident – namely that due to lack of comparability between criteria from different HEIs means that there is no possibility of producing such a carpet. Nor can any meaningful work be feasibly done to map MIT90s results to the national indicators since such a mapping would have to be done for each specific institution, an infeasibly large amount of work and a task impossible to moderate.

- 3.5. ELTI was not used in Phase Two. However, a few institutions drew on aspects of the ELTI survey to help design their Pick&Mix surveys.

(There had been widely different views from HEIs at the end of the Pilot as to the amount of updating that ELTI needed yet a common feeling that the ELTI documentation needed improvement. Consequently the HE Academy funded two BELA consultants to produce a composite update of ELTI and some additional guidance material – this was done during the course of Phase One. The ELTI Phase One institutions drew on this revised version.)

- 3.6. As in the Pilot and Phase One, Phase Two was not designed as a controlled trial of the methodologies (Pick&Mix and eMM in the case of Phase Two). However, in the view of the institutions and consultant support teams using them, both methodologies proved to be fit for purpose, although all required some tailoring to the individual circumstances of the HEIs using them. It is hard to draw detailed comparisons due to the non-overlapping institutional constituencies of the methodology cohorts, the base of Pick&Mix being in the new university sector (with a bias towards smaller institutions and in particular GuildHE members) and the base of eMM being in the research-led institutions.
- 3.7. In Phase Two, institutions took great advantage of the ability in Pick&Mix to select from Supplementary Criteria – indeed, some 25 such criteria were selected by one or more institution, although only five were selected by four or more institutions. The selections raise some interesting questions about institutional priorities and the alignment (or lack of it) with national priorities. This will be discussed in the companion report.
- 3.8. In contrast, despite the consultants offering the institutions the freedom to select a subset of eMM processes (and even suggesting such a subset), all the eMM institutions decided to exercise and score all thirty-five processes. Interestingly however, when it came to analyse their results, several “lensed down” the list of processes to a more manageable sixteen or so, often articulated as those which were intrinsically about e-learning, rather than inheriting their characteristics from general learning and teaching considerations.
- 3.9. As in the Pilot and Phase One, but to a lesser extent, there was a view to consultants that the precise nature of the methodology is much less important than the general process involved in asking penetrating questions about e-learning within an institution, particularly when it is an externally-driven process. Compared with the Pilot, but similar to Phase One, in Phase Two more time was allotted by consultants to making institutions comfortable with their chosen methodology and embedding it in a change management context. Particularly welcome features were the introductory briefing half-day for each methodology right after the kick-off meeting – and in the case of eMM, a full two-day workshop a month later.

- 3.10. As in the Pilot and in Phase One, in Phase Two a few participants contended that both of the benchmarking tools contain implicit assumptions about good practice in e-learning.

There was a feeling in the early stages of Phase Two that eMM would have to be modified to cope with distance learning providers – but by the end of Phase Two, a consensus was emerging from the two main such providers that this was not the case. However, there were a number of more minor but energetic debates between the methodology owner, Dr Stephen Marshall, and institutions.

In the case of Pick&Mix, certain of the resistances and tensions evident in Phase One – over quality and learning material guidelines – seemed to lessen in Phase Two (but were still present to an extent). In the case of quality, the cause seems to have been the slow but steady increase in knowledge, understanding and acceptance of the QAA Precepts on “Collaborative provision and flexible and distributed learning (including e-learning)”, produced in September 2004 – suggesting that such material does take time to percolate. In the case of learning material, one cause of this might have been the new TechDIS briefing material, widely distributed, which sets accessibility within the wider “accessibility for all” context of usability and document guidelines.

- 3.11. It is undoubtedly true that ideas about good practice are constantly evolving (for example, reflecting the possibilities for pedagogy offered by Web 2.0 technologies), which might lead one to believe (as to some extent in Phase One) that benchmarking methodologies were flexible frameworks, within which tools are constantly adapting and developing – within some constraints. For example, in Phase One several new Supplementary Criteria were added to Pick&Mix and many new indicators to ELTI, in both cases mostly generated by institutions in dialogue with the consultants. Interestingly there was no such pressure in Phase Two – in fact, for both methodologies there was counter-pressure from institutions to stabilise the methodologies – and no pressure at all to produce hybrid solutions (as has had to be done elsewhere, for example several times in the FE sector both in England and Scotland).
- 3.12. In the Pilot there was a comparatively low level of interest in benchmarking against other institutions. In Phase One, institutions in each BELA methodology cohort had group meetings, at which there was much informal collaboration including, but not only, on Pathfinder bids. Thus even though there was no explicit competitor research in BELA Phase One there was much sharing of information, though within a generally cooperative framework.

In Phase Two, the greater strength of collaborative working and the prescription from the HE Academy that anonymised carpets would be made public in the final report had the effect of creating greater interest in comparative aspects – but always within the spirit of collaboration for development. (It may have helped that there was not even the minor competitive element of Pathfinder bids.) For example in the eMM final cohort meeting each institution presented their draft institutional carpet to cohort colleagues and in the Pick&Mix final cohort meeting each institution engaged in a frank self-reflection on their scores and the implications (even though there was not time to present all the scores in detail).

It is also worth noting that the former lack of comparative analysis in UK HE is not shared in other countries and sectors – it has been a part of eMM from the beginning that anonymised carpets are made public and in both English and Scottish FE their use has recently become routine.

- 3.13. As in earlier phases, there was very little flow of information *between* the eMM and Pick&Mix methodologies, not at the institution level. However, in Phase Two this could be as much to do with the conceptual gap between eMM and the other public criterion-based methodologies, due to the use of dimensions in eMM – thus the gap

is far wider than between Pick&Mix and ELTI, EMFFE, eLPS, etc – all of whom share a common MIT90s-inspired ancestor somewhere in the early days of evaluation of the National Learning Network (NLN). There was a mitigating effect in that one consultant was, by design, a member of both teams – and there was considerable sharing of information via that route.

- 3.14. Interestingly several items of vocabulary rapidly became common between eMM and Pick&Mix – including “carpet” and “slice”. Rather more deliberately, and leveraging on the skill set of the new consultant who had joined BELA with much experience in FE benchmarking, commonality was ensured in reporting format and colouring for carpets.

Although further work is necessary it is possible that even two very distinct methodologies such as eMM and Pick&Mix could eventually draw on a common toolset of survey tools (as well as presentation and calculational tools mentioned above).

- 3.15. In Phase One, based on the hope the MIT90s framework could provide some kind of unifying influence, Pick&Mix adopted the MIT90s categories into its system, and more than one Pick&Mix institution used the MIT90s categories to structure its report. However, in Phase Two the advent of anonymised carpets suggests that the unmodified use of MIT90s is not possible for two reasons. First, the way the Pick&Mix core criteria (not supplementaries) fall into MIT90s categories is extremely uneven. Second, pure MIT90s does not separate staff from students and has no theme of pedagogy, leading to accusations of a focus on strategy out of favour in modern thinking (in FE as well as HE).
- 3.16. In addition to earlier developments in Phase One that weakened the position of MIT90s within HE, the MIT90s position continued to deteriorate in FE during the Phase Two timescale. The Scottish college benchmarking methodology DSA was based on a version of eMM and so did not use MIT90s categories or levels; the English college EMFFE benchmarking scheme does not use MIT90s categories (though the MIT90s levels remain); and the EMF43 variant of EMFFE used to determine e-maturity in the PCDL sector even removed the MIT90s levels, replacing them with an arguably more “modern” 4-level embedding scheme consistent with the Scottish scheme. Current Becta thinking still seems to favour a connection with MIT90s levels but has dropped completely the MIT90s categories.

4. Level and nature of support provided, with key activities, events, and resources

- 4.1. As in Phase One, each BELA institution had a support consultant assigned to them, but in a departure from Phase One, each consultant had an assigned alternate. The support consultant(s) made a number of visits to the institution, usually around four depending on need and logistics, and provided email and telephone support to the institution and its chosen methodology. On at least one of these visits the support consultant(s) would have a meeting with the Pro-vice Chancellor or other senior figure who had signed off the benchmarking expression of interest, in some cases more than one meeting. In a few cases (as with earlier phases) the senior figure took an active part in the benchmarking team or its steering group, and in a few cases the Principal (in smaller institutions) also met the consultant(s).

It turned out that the eMM institutions seemed happy with less visits from the support consultant(s) than the Pick&Mix institutions. This seems to have been partly due to the increased level of briefing and cohort meetings overall (including the two-day workshop for eMM) but also to the additional workload that eMM institutions reported, which led to very crowded diaries. There were also some differences in the “dynamic” of scoring meetings and of benchmarking teams which seem in part to be caused by the methodologies and in part by the different institutional demographics (including size and style).

- 4.2. In addition to the face-to-face meetings with the institutions, the support consultants for each methodology organised all-day cohort meetings where representatives (usually two, but often more) from each institution attended. Pick&Mix had four such meetings (it was originally planned to be three but institutions wished to have another one), eMM had three (but preceded by a two-day workshop and the last was a two-day meeting). These meetings discussed topics of common interest, such as creating supplementary criteria or how to find evidence for criteria.

In addition, both methodologies benefited from a half-day briefing the day after the programme start-up meeting. (This was a strong recommendation from Phase One.)

- 4.3. Both methodologies were also supported by a range of documentation, in the case of eMM an extensive and long handbook. The general principles of each methodology were described in entries on the HE Academy benchmarking wiki (<http://elearning.heacademy.ac.uk/wiki/>) with links to key files describing different aspects. From time to time, blog postings on the HE Academy benchmarking blog (<http://elearning.heacademy.ac.uk/weblogs/benchmarking/>) alerted institutions to new information, as well as acting as a bulletin board for announcements of meetings. Such postings were normally also supplemented by group emails to ensure that institutions had several channels for notification of changes.

- 4.4. Glenaffric (part of the Academy's Evaluation & Dissemination Support Team) provided a group communication system called HELGA for use in the Benchmarking and Pathfinder Programme. (This is based on the ELGG open source system.) This was not actually used to a very great extent by either Pick&Mix or the eMM cohort but it served the purpose of providing a private group blog for each methodology cohort, a files repository and a calendar tool. The calendar tool, though a little tedious to use, was a vital way of scheduling the nightmarish pattern of scoring meetings during the three-week "scoring season". The files repository had a number of performance and usability problems which impacted on its wide use but no doubt this could be improved.

Not for the first time in such projects, the most successful tools were the two private JISCMAIL lists set up, one for each cohort. Though the consultants tried gently to discourage it, the lists were also used to send round attached files.

The OIM system used in Phase One was not used in Phase Two – however, the consultants feel that there are important lessons to be learned from OIM and from HELGA that need to be taken into account for the future use of such systems.

- 4.5. Some use was also made of audio conferencing for liaison with institutions and desktop video-conferencing for in-between cohort meetings, but the main conclusion of Phase One – that such tools needed standardisation and "embedding" in order to be really useful – would still be the case after Phase Two. In contrast, internet telephony (Skype and others) became routine, now that the interface to the public telephone system is more or less seamless.

- 4.6. A list of the main HE Academy, BELA and cohort meetings is below.

10 May 2007	Phase 2 briefing (kick-off) meeting	Bristol
11 May 2007	Phase 2 methodology briefings for Pick&Mix and eMM	Bristol
23-24 May 2007	eMM 2-day workshop	Milton Keynes
9 Jul 2007	Pick&Mix cohort meeting #1	London
11 Jul 2007	eMM cohort meeting #1	Bangor
5 Sep 2007	Benchmarking symposium at ALT-C	Nottingham
10 Sep 2007	Pick&Mix cohort meeting #2	Falmouth
14 Sep 2007	eMM cohort meeting #2	Manchester

29 Oct 2007	Pick&Mix cohort meeting #3 (by request of HEIs)	London
5 Dec 2007	Pick&Mix final cohort meeting (#4)	Newcastle
30 Oct 2007	Meeting of all HEA consultants with EDSuT and Derek Morrison	London
6-7 Dec 2007	eMM final cohort meeting (#3)	Sheffield
24 Jan 2008	Phase 2 wrap-up meeting	Bristol

5. Key challenges, issues, resolutions

- 5.1. In response to feedback about the start-up period in Phase One the consultants in Phase Two introduced methodology-specific briefing sessions on the day after the start-up meeting. This was a successful activity. In addition, the extra learning curve for eMM necessitated a two-day workshop a few weeks later – this was also welcomed.
- 5.2. As with earlier phases, the question of what should be considered e-learning (and what should not) continued to exercise some Phase Two institutions. The consultants tended to deal with this by suggesting taking two different definitions and seeing how the criteria scores varied – and if necessary benchmarking all of learning and teaching (the so-called Superslice in Pick&Mix terms) – no one ever did that but the “thought-experiment” seemed to concentrate minds. On the whole, suggestions of this nature helped engender some degree of consensus.
- 5.3. Phase Two did not suffer from some of the challenges experienced in Phase One due to changes in staff and institutional mission in the time between submitting an expression of interest (EOI) and actually joining the exercise – the reduced latency between EOI and actual start-up in Phase Two proved very helpful. However, the consultants did draw on lessons from those earlier episodes and used where appropriate a tentative and facilitative initial approach and judicious use of two-consultant delegations (since we had the “buddy” scheme).
- 5.4. However, there were a few institutions where unexpected staff losses (especially among PVC-level staff), reorganisation and union issues (not caused by benchmarking!) did cause a few issues. In all cases the institutions coped with these and stabilised their benchmarking teams – at times the best tack from the consultants was “masterly inactivity” in a facilitative way until the issues were resolved. It is noteworthy that this is evidence that the benchmarking had a higher institutional profile in Phase Two institutions than in some in Phase One.
- 5.5. Having learned from Phase One, steps were taken to ensure that variant interpretations of methodologies did not creep in (as opposed to legitimate local nuancing). In eMM it was easier since there is an ultimate methodology owner that the two eMM consultants could defer/refer to for rulings when necessary – and the two consultants worked in a close buddy system. In Pick&Mix the consultant who developed it took a clearer role as methodology owner (within the open source tradition), as part of a clearer division of duties between the four Pick&Mix consultants. The cohort meetings were more clearly managed to ensure a commonality of approach, in addition to their other purposes. (On a historical note, the MIT90s approach in Phase One was the basis of the “buddy” consultant support model used across Phase Two.)
- 5.6. In Phase Two the cohorts were not split into formal subgroups meeting separately. However, eMM was set up with three clear subgroups: three WUN organisations, two Welsh research-led institutions (formerly part of the University of Wales), and two large distance learning providers. As one would expect from wider considerations there was a certain amount of working within these groups separate to the cohort meetings but the subgroups did not formally meet as such in parallel session within the cohort meetings.

In contrast, having learned from Phase One, the Pick&Mix cohort was set up *without* formal subgroups. Thus it came as a bit of a surprise when institutions seemed keen to split into subgroups and to meet in parallel session during each cohort meeting. There was no particular problem in facilitating this and the institutions seemed to like the additional interaction this brought about. The message is that one cannot and should not plan everything.

- 5.7. Phase Two was spared the exigencies which meant in Phase One that proposals for participation in the Pathfinder Programme needed to be prepared while the benchmarking Phase One exercise was still far from complete. However, it was clear that several institutions would have been quite happy to put up with such “exigencies” if funding had been available.
- 5.8. Compared with Phase One, there were far less tensions in institutions between “benchmarking” and “quality” stakeholders. As noted earlier, the QAA Precepts that cover e-learning (inter alia) are slowly but steadily having an effect.
- 5.9. In Phase One the HEFCE Measures of Success appeared to have little influence on the thinking of the benchmarking institutions. However, in Phase Two the requirement to produce an anonymised carpet of scores and desire (even if optimistic) to produce a carpet across the sector does draw attention to the need for standard indicators – for the first time in the benchmarking programme. Consequently effort has gone into mapping both Pick&Mix and eMM into the HEFCE Measures. This work built on a number of sources including internal BELA work in the Concordance Project and early work (in fact pre Phase Two) from Northumbria University. In parallel, work was going on with mappings into MIT90s categories.

Towards the end of Phase Two, it became clear that HEFCW were introducing Indicators of Success for e-learning in Welsh institutions. Thus work was undertaken to map both methodologies also into the HEFCW Indicators.

In addition, it had already been agreed at an all-consultant meeting in summer 2007 that BELA would map its methodologies into the OBHE reporting categories, in order to allow at least a narrative overview of the sector to be constructed.

In order to complete the pattern of national indicators, it was felt prudent to include the Becta Balanced Scorecard, currently the top-level planning scheme for “e-maturity” in the FE and Skills sector and also in schools. This is for at least two reasons for doing so. First, in theory, it is to apply to all parts of the education sector including HE. Second, in practice, several institutions in all phases of benchmarking have been either FE colleges or HE institutions still delivering a percentage of FE alongside their HE provision.

At the final Pick&Mix cohort meeting a draft final carpet was presented with all these derived indicators. The work for eMM is more complex but at the final eMM cohort meeting mappings were presented for HEFCE and HEFCW, the latter with the assistance of Bangor University – the carpets with the derived indicators will follow in due course.

6. Value added outcomes

- 6.1. This chapter covers institutions who have published their own benchmarking reports, ongoing institutional collaborations, dissemination activities and outputs from cohort meetings.
- 6.2. At the time of writing institutions are mostly still finalising their internal reports. However, one Welsh institution produced a draft version of its report to meet with the HEFCW timescale. A few institutions do seem to be intending to produce public versions of their internal reports.

A significant subset of the Pick&Mix institutions, large and small, availed themselves of the opportunity for their senior management to have a “reflection” meeting on the outcomes of the exercise during the period January-February 2008, to which their support consultant was normally invited. Senior management teams reported to consultants that they found this a very positive part of the process. In addition, some other Pick&Mix institutions used the very final scoring meeting (often the last in a series after slices and rehearsals) for reflective purposes.

The eMM institutions tended to use their final carpet meetings in November/December for purposes of moderation and reflection, but the two Welsh institutions ran linked separate and joint reflection meetings in late January 2008.

6.3. It is again too early to say much about institutional collaborations except for the following:

- The Pick&Mix institutions (mainly but not all GuildHE) worked well and frankly with each other. Theories about teaching-led institutions being “different” from research-led institutions were not borne out in practice – the key differentiators in benchmarking seem to be much more to do with degree of decentralisation – which affects all kinds of institution – and possibly with size.
- The Open University and London External came into Phase Two with the express intention of working together – and in fact co-hosted a meeting on December 5 on eMM for distance learning.
- The WUN eMM institutions are continuing to work together in this area, and considering working with others in WUN including outside the UK.
- The two Welsh institutions are existing collaborators (including having had a joint reflection meeting) and the dynamics of Welsh funding means that further intra-Wales collaboration is expected. Interestingly, the Welsh institutions and the HEFCW e-learning strategy make it clear that collaboration should not be restricted only to other Welsh institutions.

6.4. The “Critical Friends” model employed in the HEFCE-funded Pathfinder Programme will also play a part in the implementation activities of the HEFCW-funded *Enhancing Learning and Teaching Through Technology* strategy.

6.5. Institutions – and the staff within them – will also undertake their own dissemination activities. Inevitably, because Phase Two is only just finished, there are few outputs as yet – with the notable exception of Northumbria University (but they had the advantage of starting similar work before Phase Two was under way). However, there was institutional involvement in the benchmarking symposium at ALT-C 2007. On the evidence of Phase One, and on common-sense grounds, it takes time before the journal papers start to flow – for example the University of Glamorgan from Phase One is now a strong contributor.

6.6. The Pick&Mix and eMM methodologies are all documented and in the public domain. All major updates to documentation are linked from the methodology entries on the HE Academy benchmarking wiki and notified to enquirers via the HE Academy benchmarking blog. In certain cases additional “work in progress” material is available in HELGA (the new private social networking option for Phase Two institutions).

The reports for eMM are stored in the eMM wiki (<http://www.utdc.vuw.ac.nz/emmWiki/index.php/>) maintained by Stephen Marshall at the University of Wellington (New Zealand) or linked from that. There is also a blog run by Stephen Marshall which contains eMM news – and he has set up an eMM mailing list.

The reports for Pick&Mix are stored in the HE Academy benchmarking blog with

commentary material on the wiki. A longer-term permanent archival solution is needed for these and discussions are ongoing.

- 6.7. In addition to the major outputs, other more specific outputs have been made available by BELA institutions and consultants. The wiki contains a frequently updated glossary of benchmarking terms and links to a variety of other BELA-related outputs including an analysis of the HEFCE Measures of Success and HEFCW Indicators of Success. Unlike Phase One, the institutional blogs do not on the whole contain much that is relevant beyond each host institution.

We recommend that the HE Academy considers the information and archival management options for ensuring that there is long-term access to the specifications and “trade-craft” associated with the methodologies they are supporting.