



LEADERSHIP SCHOOL

Preparing Higher Education leaders to become the change makers of the university of tomorrow

Benchmarking: from e-learning to digital transformation

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1. Overview



Definition of benchmarking

A measurement of the quality of an institution's policies, products, programmes, strategies, etc., and their comparison with standard measurements, or similar measurements of its peers.

The objectives of benchmarking are (1) to determine what and where improvements are called for, (2) to analyse how other institutions achieve their high performance levels, and (3) to use this information to improve performance.

Based on: <http://www.businessdictionary.com/definition/benchmarking.html>

Benchmarking can be with similar institutions, sector leaders, and/or the occasional **exo-benchmark** with a **game changer** (e.g. small private provider, online school etc)



2. History of Benchmarking E-Learning

A UK-centric review



Benchmarking e-learning

- Started in UK and New Zealand circa 2005
- Soon spread to Australia
- Not closely linked initially to quality agenda
- At European level, developments majored on E-xcellence from EADTU
- Increasingly, links were made to quality agendas
- US Quality Matters scheme now widely used
- (Some here should remember the BELEUSA bid)



Benchmarking e-learning in UK

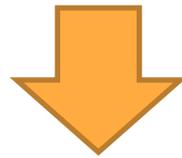
- Foreseen in HEFCE e-learning strategy 2005
- Higher Education Academy (HEA) ran it
- Four phases – 82 institutions – 5 methodologies
- Justified entry to Pathfinder and Enhancement *National initiatives*
- Was seen as key tool for update of learning and teaching strategy at institutions
- Used funding left over from UK e-University



UK: benchmarking e-learning

In those days UK said:

“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”



Now I suggest:

“more important is for us [EU] to help individual institutions understand their own positions on **opening up learning**, to set their aspirations and goals for embedding **opening up learning** – and then to **benchmark** themselves and their progress against institutions with similar goals, and across the **Member States and EU**”



Question

Benchmarking e-learning flourished in the 2000s decade, which was also the decade when many Member States had e-learning policies for their HE sector.

Now benchmarking is much less used. (Another “lost decade”?)

Yet EU and several Member State governments are looking very much now at national-level benchmarking of countries’ activity in e-learning.

So is benchmarking coming back into favour again?

But this time it seems that institutions will have to take the lead since most governments seem to have lost interest in IT policy for higher education teaching and learning.

The work done by the ACODE association with their annual benchmarking workshops is very interesting.



3. The current systems

The “final five” (there used to be nearly 20)



The current systems

1. **ACODE** – from the Australasian Council on Open, Distance and e-Learning – annual benchmarking meeting and of interest to several ICDE member organisations
 2. **eMM** – e-learning Maturity Model – from Stephen Marshall at Victoria University of Wellington – used in three phases in New Zealand under government funding; adapted by Sero for Scotland
 3. **E-xcellence** – from EADTU
 4. **Pick&Mix** – from Matic Media – has been used at many UK HEIs and for a *Distance Learning Benchmarking Club*
 5. **Quality Matters** – qualitymatters.org – widely used but mainly in US
- Note that MIT90s is much referenced but is a *container* for benchmarking and change management systems, not a system itself



4. Interlude: Are institutions changing disruptively?



Disruptive change (highlights)

- Many gurus predict the “death of the traditional university” but few of them have run universities, or are investing in disruptive entities
- Many distance teaching universities started in the early 1970s
- Social media go back to 1992 (the FirstClass BBS at UKOU etc)
- UOC, the first online open university, founded 1995
- US and UK online learning from many institutions active from the late 1990s, when the first quality scheme arose, *Quality on the Line*
- The new-gen Interactive Design Institute was founded 12 years ago
- Investors in disruptors are not seeing rapid payback
- Students seem more than happy with leading campus-based institutions *provided* they facilitate digital approaches



5 Pick & Mix

General principles





Pick& Mix overview

- First release 11 years ago (2005), influenced by Chickering & Gamson and *Quality on the Line*, plus MIT90s thinking
- Focussed on e-learning, not general pedagogy
- Draws on several sources and methodologies – internationally (including US) and from college sector
- Not linked to any particular style of e-learning (e.g. distance or on-campus or blended or open or mobile) – see “moods”
- Best used in institutions with “noticeable” activity in e-learning
- Suitable for desk research as well as in-depth studies
- Suitable for single- and multi-institution studies
- Embedded in two Success Factor schemes produced by EU projects
- Used at over 40 institutions over 10 years, sometimes several times



Criteria

- Criteria are atomic, unimodal “statements of practice” which are scored into six performance levels 1-6
- All statements and documentation are in the public domain – to allow analysis & refinement
- *The number of criteria is crucial:* Pick&Mix currently has a core of 20 and recommends that no more than 24 are used – based on the literature and views from senior management
- Guidance is available for creating new criteria



More on Pick& Mix scoring

The 6-point scale (1-6) is made up of 5 levels (compare Likert scale, MIT90s Venkatraman levels) plus 1 “excellence” level

Scores are contextualised by “scoring commentary”

The 6 levels are mapped to 4 colours in a “traffic lights” system

red, amber, olive, green

This is the basis of the Matic Media logo (plus yellow which is not a benchmark colour):



(Matic Media is the developer of Pick&Mix)



“Carpets” for institutions

Criterion name	A	B	C	D	E	F	G	H	I	Av
Adoption	3	4	5	3	3	3	3	1	1	3.6
VLE stage	5	5	5	5	5	5	5	5	5	5.1
Tools	5	1	5	1	1	1	3	3	1	2.8
Usability	3	3	3	1	1	1	1	1	1	2.5
Accessibility	1	3	1	1	1	3	1	1	1	2.0
e-Learning Strategy	3	5	1	3	3	5	5	3	3	3.9
Decisions/Projects	3	3	3	3	3	3	5	3	3	3.4
Pedagogy	3	3	1	1	3	3	5	1	3	2.9
Learning Material	1	1	1	1	1	1	3	1	1	2.0
Training	3	3	1	3	1	3	3	3	3	3.1
Academic Workload	1	1	1	1	1	1	1	1	1	1.6
Costing	1	1	1	1	1	1	1	1	1	1.4
Planning Annually	1	3	1	3	3	3	3	1	1	2.7
Evaluation (e-learning)	3	5	1	1	1	1	5	5	5	3.4
Organisation	1	1	3	3	3	3	1	3	3	2.9
Tech Support to Staff	3	3	3	5	3	1	1	1	3	3.3
Quality Assurance	3	3	3	1	1	3	1	3	3	2.8
Staff Recognition	3	3	1	1	1	1	1	1	3	2.1
Decisions/Programmes	3	1	1	3	3	3	3	3	1	2.7
Quality Enhancement	1	3	3	3	3	5	5	3	3	3.5



6. Pick& Mix

Three traditional criteria



P01 “A doption” (Rogers)

Placeholder



1. Innovators only
2. Early adopters taking **it** up
3. Early adopters adopted; early majority taking **it** up
4. Early majority adopted; late majority taking **it** up
5. All taken up except laggards, who are now taking it up (or retiring or leaving)
6. First wave of **it** embedded, second wave starting (e.g. m-learning after e-learning)



P10 “Training”

Placeholder



1. No systematic training for it
2. Some systematic training in it, e.g. in some projects and departments
3. Uni-wide training programme for it, but little monitoring of attendance or encouragement to go
4. Uni-wide training programme for it, monitored and incentivised
5. All staff trained in it, training appropriate to job type – and retrained when needed
6. Staff increasingly keep themselves up to date in it on a “just in time, just for me” fashion except in situations of discontinuous change



P05“ Accessibility” (re disabilities)

1. VLE and e-learning material are not accessible
2. VLE and much e-learning material conform to minimum standards of accessibility
3. VLE and almost all e-learning material conform to minimum standards of accessibility
4. VLE and all e-learning material conform to at least minimum standards of accessibility, much to higher standards
5. VLE and e-learning material are accessible, and key components validated by external agencies
6. Strong evidence of conformance with letter & spirit of accessibility in countries where students study



Benchmarking and quality

Critical Success Factors -----

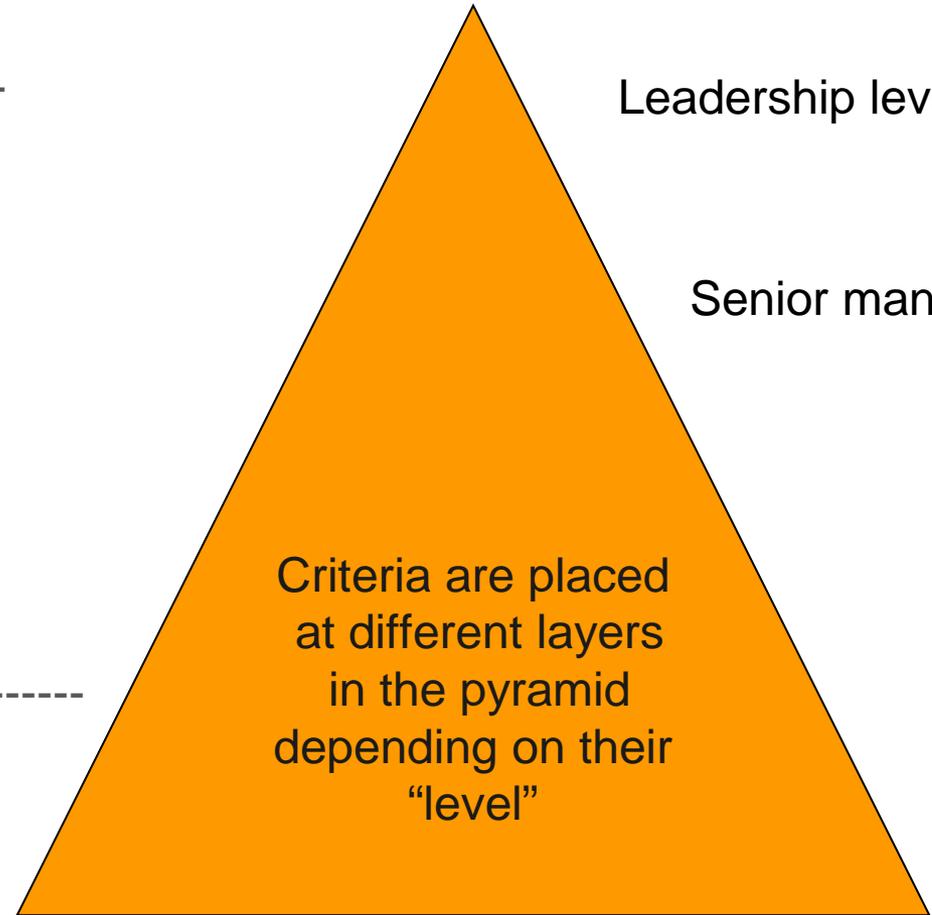
Benchmarking ----

Quality -----

Detailed pedagogic guidelines -----

Leadership level

Senior managers





7. Tradecraft

Criteria, Slices, moods, new-gen criteria



Supplementary criteria

- IT reliability
- Leadership in e-Learning
- Innovation Management
- Plagiarism Avoidance
- Information Literacy of Students
- Open Educational Resources
- Management of student expectations
- Student satisfaction
- Consortia Roles Definition, Consortia Roles Implementation, Consortia No-Compete
- And around 50 more, all unimodal – see [version 2.6](#)



Local criteria – worth it?

Institutions can track their own “local criteria”

But this is rarely done. And it is hard for beginners to craft good criterion statements – though we provide guidance.



Slices (departments etc)

As well as benchmarking the whole institution, it is wise to look at a few “slices”: Schools, Faculties, ...

Useful to give a context to scores: “jitter”

Do not cut too many slices

Slices need not be organisational, they can be programme or function-based: e.g. Distance learning

Most other systems also now use this approach, but this was fundamental to Pick&Mix from the beginning



Moods of Pick& Mix

These are where the placeholder “it” normally occupied by “e-learning” in the base form α (“ur Pick&Mix”) is occupied by related terms. The main moods are:

β general teaching and learning

τ Information Technology

δ distance learning, as used in the *Distance Learning Benchmarking Club*

γ Green (sustainable) ICT

ω OER, as developed for the POERUP project, with Bieke Schreurs OUNL

The reason why all this works is that the criteria text focuses on general principles and policies valid across a wide range of programmes and institutions, such as staff development, strategy formulation, decision processes, etc. The formulation of μ for MOOCs or ϵ for Opening Up Education can now be safely left to the reader



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The Distance Learning Benchmarking Club: Final Summary Report, 2011, [URL](#)

OER Benchmarking – mood ω of Pick&Mix, 2011, [URL](#)

Green ICT – mood γ of Pick&Mix, 2011, [URL](#)

Benchmarking wiki: currently at http://bela.referata.com/wiki/Main_Page



Thank you for listening

Paul Bacsich, Sero Consulting Ltd (licensed to use Pick& Mix)

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