# THE UKᴇU REPORTS

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### ANNEX 1 TO REPORT 01

# Partnership with UKeU
# A Guide for HEIs

## John Slater

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Disseminated by The Higher Education Academy

## Editor's Introduction[*]

Despite being written in July 2002, this is one of the best overall "qualitative" descriptions of the UKeU around. It was written at a time when many of the features of the UKeU had settled down, many of the senior staff were in place, some of the early HEI contracts were signed and there was still a strong level of optimism. Thus its freshness is appealing.

It was written on behalf of the Committee for Academic Quality as a "for information" paper, and distributed widely to HEIs. The paper was progressed through CAQ in the usual way and at one point bore the paper number CAQ 02/21.

The paper[†] has been lightly edited, mainly for consistency of naming. Footnotes have been kept to the necessary minimum, with the aim to clarify and update, not deaden the text.

## 1.    Introduction[‡]

1. The aim in establishing UKeU was to provide a vehicle to help to address both the ongoing drop in UK market share in providing HE opportunities for overseas students, and the expansion of the home participation rate to 50% with a fairer mix of participants than is currently achieved.

2. HEFCE commissioned a number of studies that indicated problems of scale leading to a failure of what are essentially small UK operations to match the growth of larger US and Australian providers in key overseas areas. UKeU will primarily act as a broker for UK HE, providing core services for development and delivery to HEIs including a quality platform, marketing and related activities, to support the delivery of accredited UK HE, largely through e-learning.

3. UKeU is a public private partnership in which the public sector is represented by the HEIs, funded largely by the DfES through HEFCE, and private sector investment comes in equipment, licenses and hopefully cash etc., in exchange for shares. One of its ultimate objectives therefore is to make a profit for shareholders although this may be a little way off. As a result of this proposal, the government released extra money to HEFCE to start the operation to see whether UK HE could make a better worldwide impact and to provide one possible channel for home expansion.

4. Originally the idea had been for a small number of universities to own the HE side of the business and provide most of the courses. After consultation with the sector and Universities UK, a more open model in which the HE share is owned by a company limited by guarantee (eLearning Holding Company), wherein all but

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[*] By Paul Bacsich

[†] The original title was the rather unwieldy "Partnership with the eUniversity (UK eUniversities Worldwide Limited) – A guide for HEIs".

[‡] From now on the material is from the author, Professor John Slater.

four UK HEIs have a share, was agreed. Each year, UKeU invites expressions of interest from all relevant HEIs. It also works closely with a set of course providers.

5.  Some other activities are funded through UKeU. These include a related research programme, projects in China[*] that are in the public interest to pursue, and courses involving HEFCE funded numbers designed to help with the government's home agenda. These are collectively known as public good activities and are self financing from the UKeU point of view. Information about them comes from HEFCE from time to time.

6.  The majority of activities are, however, based round the production and delivery of e-learning overseas in a hopefully mutually beneficial partnership between the providing HEI and UKeU. It is this mode of operation to which this document, and its related appendices, provides a guide.

7.  In order to succeed in an increasingly crowded area it is vital that the UKeU builds up its activities rapidly, before start up money becomes dissipated. Only by growing its portfolio can it achieve the economies of scale that it was set up to exploit.

## 2.    Overview

8.  UKeU is founded on a proposition of:

- World class learning designed by UK HE

- Delivery within UK pedagogic paradigms including group work, tutorial and mentored activities

- Accredited by UK HE

- Developed to high standards on a basis of risk shared by HEI and UKeU with the possibility of cash investment by UKeU

- Delivered on a world class platform[†] supporting fully the pedagogy

- Available to service levels not normally achieved within UK HE

- Appropriately marketed in targeted countries and the corporate sector

- With partners in place to provide any required assistance with tutors, assessment, permissions to operate etc.

- And UK infrastructure that supports the process, based in central London to ensure effective operation and ease of access.

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[*] The eChina programme.

[†] The truth at the time of writing would have been more like "aimed to be a world class platform".

9. UKeU currently does not offer its own awards. However, it is anticipated that not all learners will take all their learning from a single HE supplier. Accordingly provision is being made for non-standard pathways to lead to awards.

10. A number of key countries have been identified as initial targets. These are outlined in Appendix A. This does not mean that other countries are excluded but that new partners are likely to be required for delivery in such countries.

11. Most of the initial thrust will be at two levels, postgraduate masters and undergraduate with level 1 exit. A fine level of granularity is needed since the Continuing Professional Development (CPD) market in particular is not looking for whole Masters programmes, but for smaller units that can be individually given credit, and combined eventually to give a qualification if required. In the case of level 1 undergraduate exit materials, we are looking for learning that can form the initial piece of a number of pathways, possibly involving more than one HEI or subject area. Synergy with home-based offerings is likely to keep costs down.

12. Some but not all of the initial portfolio will be the provision of clusters of learning opportunities in specific discipline areas including health, business, and IT. We intend to work closely with the NHS University[*] and have good relationships with Learndirect (to facilitate learning pathways).[†]

13. Much UKeU activity will be brokering. We intend to build on existing marketing infrastructure, and the service structures of the more successful UK HEIs. Examples could include services for rights clearance[‡] and for delivering artefacts such as DVDs to all students taking a piece of learning.[§]

14. The initial launch in January 2003 will be on a restricted platform for a small number of students entered for a small number of awards covering 420 masters level credits. Thereafter, we look to grow at about 1500 credits per year, reaching a steady state of perhaps 7000 to 10000 credits. The full initial platform functionality is scheduled to be available in September 2003.[**]

15. Driven by supply, we will initially follow a cohorted approach with two semester operation (January and September).[††] Proposals for push-and-go (e.g. when enough students have signed up to enable a tutorial group to work), and learner-timed learning are not ruled out.[‡‡] In the longer term we will be better placed to drive activities from demand considerations, commissioning learning to meet the needs of customers.

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[*] This came about, with the secondment of a member of UKeU staff to NHSU.

[†] In the event, collaboration with Learndirect, though fruitful in the technical sense of e-learning standards, did not occur on the academic side.

[‡] This never eventuated.

[§] This never eventuated either.

[**] It does not need the editor to point out that this never happened. See the Select Committee Report *passim*.

[††] This was more or less the pattern for many courses.

[‡‡] HEIs were not keen on either of these, even though many theorists are. The theorists do not have to write the business cases for, and manage, such projects.

16. Two broad market segments have been identified. They have separate marketing directors within UKeU. One is the growing corporate market. Here government in the UK and overseas is viewed as corporate. Such customers sometimes require tuning of offerings, represent a different taxation proposition, and can provide their own tutors and marketing under some circumstances. The other is the more traditional individual student market, perhaps looking for blended learning with a variety of different blendings.[*]

17. Compliance with a quality assurance framework is a necessary part of provision through UKeU. This necessity is laid down by the sector and is under the control of the Committee for Academic Quality (CAQ), which is made up largely of senior academics from UK HEIs. It follows a largely "light-touch" methodology and works mainly by brokering to ensure that material reaches high standards.[†]

## 3.     Making a Proposal

18. UKeU is open to proposals for partnership in developing and delivering a course. Initial contact should be made with the Director of Learning Programmes. A Learning Programmes Manager (LPM) will be assigned to working with the HEI(s) to draw up a specific proposal that is agreed as being of mutual benefit. Consortia are especially welcome as risk is shared.

19. The UKeU contract will be with the HEI. We are not following a model in which authors deal directly with the "publisher" and get reward direct. We expect the award of credit for the learning. We are not normally seeking any Intellectual Property Rights in the "learningware" but are expecting the HEI(s) to handle this and put themselves in a position to grant us a license to exploit the material.

20. Proposers need to have a clear idea of what the product is, what development is needed to get it into a deliverable form, what the pedagogic model for delivery is, and the target markets and likely uptake therein. Precision is not required at this stage and the Learning Programmes Manager will help work on these ideas to firm up on detail.

21. Our experience is that, unless the course can command a premium fee, a total of 1500–2500 students over a five-year period is usually the break-even point for the sort of development costs being proposed. If there are constraints such as no more than 40 students per year, or tutoring costs in excess of fee, then it is unlikely that an attractive business case will be possible.

22. In considering target markets, it is important to be aware of possible corporate segments. A major multinational or government customer in prospect potentially diminishes risk considerably and makes investment easier to justify.

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[*] However, it was very late in the day before any blended offerings were available. That topic may be for another report some day.

[†] See Report 12 on the CAQ.

23. Development costs will vary with the degree of sophistication required of the material; the quality and suitability of existing material, whether e-learning, distance learning or conventional; and any commercial partners chosen to help develop material. Costs of training material for tutors and others may also be needed. It is important that the HEI(s) have early involvement from people who understand or can speak with authority (or both) about administrative and financial matters.

24. Whilst UKeU will probably be taking the majority of the financial risk, we are unlikely to be attracted by a proposal that removes all risk from the HEI. Proposers must have clear views on what risks they are prepared to entertain. Roughly speaking, higher risk goes with higher reward.

25. Initial proposals should typically be about 2 to 4 pages long and include the names of the institutions involved, making clear which are offering credit, the contact details for the lead proposer and the details above. A form is given in Appendix I of Report 12 on the CAQ.[*]


## 4. Services Available

26. There may be a variety of reasons for an HEI wishing to partner with UKeU. Roughly speaking these divide into the areas of platform provision, sales and marketing, customer support, in-country support, administrative services, and finance. A more detailed list with descriptions is provided at Annex C.

27. The platform is described in more detail in the next section. It is designed to provide high levels of security, a rich set of facilities for development, and a good environment for version control for delivery. It will provide high availability and networking connectivity to an agreed set of service levels.

28. Originally it had been hoped to acquire an existing marketing organisation but this did not represent good value for money. Many such organisations are in financial difficulty. Accordingly, we decided to acquire two marketing directors and a team of about 14 people. One director would be backed up by local partners, perhaps provided from existing relationships with UK HE, and would concentrate on individual students. The other director, operating mainly in the first world, would concentrate on corporate customers, making deals that would hopefully cover a number of programmes, and holding marketing events. Each year, a marketing budget and strategy would be agreed with each programme. It is estimated that 15% of total takings needs to be spent on marketing in the steady state. This is higher than that to which UK HE, with its supply-driven approach, is used, but in line with market trends.[†]

29. Customer support requirements vary with customer. There are some countries for which a call centre approach is expected but we are not proposing major operations in such countries although responsiveness to IT queries needs to be good everywhere. In most countries, support is expected from a local organisation and

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[*] Originally Annex B to this document.

[†] This section was written before either director was appointed.

we shall be providing help with IT, finance, administrative matters including registration, and academic help if authorised by the HEI (which otherwise must provide it otherwise to an agreed service level).

30. In-country partners are needed, not only for students, but also to obtain permissions to operate in the country, organise physical examinations if necessary, collect money, and generally facilitate the operation. It is clearly easier if the local partner also provides tutors to the programmes but this may not prove possible for all programmes.

31. In some cases it may be necessary to have access to finance to help students to proceed.[*] In any case, there will be a need to recruit possible tutors for the programmes, handle authentication issues, pay tutors on behalf of the programme and hire, administer, and in some cases fire them within the local legal guidelines.

32. Within the UK we will have access to services such as rights management, advice on pedagogy including tutor methodologies, financial modelling, and quality standards. Some of these services will be free and others will be included in the costing of the programme.

## 5.    The Platform

33. A major problem for e-learning in HE has been the choice of the software for the platform. There are many platforms available but few have been developed specifically with HE in mind, and fewer still with underlying support for UK pedagogy.[†] At the same time, the quality of hardware and especially its support and availability for reliable round the clock usage (7x24 operation), has not always featured highly in the priorities of UK HEIs.[‡] UKeU addresses both of these areas.

34. A lot of the platform hardware is being provided by Sun Microsystems[§] as part of their contribution as a strategic partner. They are also providing relevant software licenses including for iPlanet, a key set of tools that enable[**] computer supported co-operative working effectively, thus supporting fully monitored tutorial and related work with a high level of in-built security. The resulting system will be sufficient to cope with the first three years of the planned growth to a size significantly bigger than any existing UK university. Rather than seeking revenue

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[*] This was much talked about but seemed hard to organise despite clear feedback from the market.

[†] A historical view is important in order to make sense of this second sentence, which seems almost absurd from a standpoint of 2005. The specification work on the UKeU learning environment was done in 2001 when many experts had reasons for believing that there was a plethora of learning environments, mostly from or oriented to, the training sector. However, among the learning environments with an HE pedigree were both WebCT and Blackboard, which became, to some surprise, the dominant players in HE across much of the world including the UK.

[‡] This sentence was undoubtedly true at the time. It is not so long since some UK universities could not manage to deliver e-service over any of the Christmas–New Year break.

[§] The author wrote "SUN" as many do. The official name and spelling is "Sun" as their corporate site demonstrates.

[**] Rather, were believed at the time to enable. In the end, they were not used. Another product, called Jive, delivered this functionality. Sadly, it too was deficient.

from the operation, Sun have put their shares into a charitable trust[*] with any income being reinvested in e-learning development. Sun's interest is in the development of an appropriate platform.

35. Not all the software required for the platform is provided by Sun; UKeU has had to acquire licenses for:

- An SQL supporting database (Oracle 9i)

- A Content Management System (Vignette)

- A decision table tool (being chosen)

- Assessment software (being chosen).[†]

The architecture will allow for these components, and others, to be replaced by alternatives, possibly using open source components. The implementation is intended to be compliant with the MIT-driven OKI architecture, and may be the first such.[‡]

36. The architecture is designed with scalability in mind. iPlanet[§] is a set of tools that allows the effective development of threaded discussions, synchronous and asynchronous conferencing, chat rooms, and various web based activities, in a way that is monitored and reported at a low level in the system. The issue of reminders to students, tutors and markers both in advance of and after deadlines are reached, viewed as essential to good retention rates, is inbuilt. Personalised calendars can be efficiently produced. There is a good division of functionality to the components best placed to deliver them, unlike a number of conventional learning management systems where the product includes all manner of pieces for collaborative work, email, assessment and administration. The "page turning" aspects of the UKeU platform, whilst important, are not the core of the system.

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[*] ¶18 of the Select Committee Report on UKeU clarifies this further:

> 18. In October 2001, the operating company was established (UKeU). It was a private company, limited by shareholders. The shareholders for UKeU were the Holding Company, Guillemont Trust (a charity that Sun Microsystems UK vested its UKeU shares in because it chose not to hold shares in UKeU), and Croft Nominees (a company vehicle to hold the contributions from Sun Microsystems UK that were put into escrow). Equal shares were given to the public sector shareholders (HoldCo) and the private sector shareholders (Guillemont and Croft Nominees). Over time, however, as HoldCo needed to invest more public funds into UKeU, HoldCo became the dominant shareholder by a significant margin and this affected the relationship between the holding company and the operating company.

[†] The MCQ package from WebMCQ (now MCQ International) was chosen for this role. For more on the company see http://www.webmcq.com/.

[‡] In the end, the OKI work moved more slowly than expected, but the UKeU work even more slowly. There were meetings but no real synergy. The details of this topic are out of scope for UKeU Reports 01–12.

[§] Answers.com notes that iPlanet was "the brand name for software from the Sun-Netscape Alliance. Most Netscape products were renamed iPlanet after the joint venture was organized. Sun do not now use the name iPlanet.

37. The platform specification was developed in conjunction with a set of pedagogic and administrative experts from UK HE.[*] The result was a 500-page functional specification, mainly expressed in UML use cases.[†] The implementation also involves a team including some such people since Sun acquired HE subcontractors to help.[‡] Sun are providing the overall architectural design team as part of their contribution but also providing substantial work for corresponding payment.

38. The platform will be housed at a commercial hosting site.[§] This will guarantee a full 7x24 service and give excellent Internet connectivity worldwide. This is only of benefit if the learning availability matches that of the platform. The material must behave properly, and tutorial and other support needs to respond to agreed service levels. Internet connectivity to the user must also be commensurate with that provided by the platform.

39. The user interface is provided through a portal being designed and implemented by Epic Group plc. Special consideration is given to cultural and access issues and it should eventually be possible to alter the experience with bandwidth or quality of connectivity.

40. UKeU will supply training and support for developers and deliverers using its platform. It will also help with "translation" from other common environments.[**] Should an HEI wish to use its own platform for delivery, it will need to conform to certain service levels, essentially close to those achieved by the UKeU platform.[††] Administrative data will be transferred between the two systems using a set of "flat file" specifications that are an extension of the specifications used for transfer to the HE record systems.

41. The platform is also to be available for use with the HEI's own (non-UKeU partnership courses) and will become available as a product for mounting on the HEI's own hardware. Facilities for modifying screens and the user interface as a whole are being made available.[‡‡]

42. Further details on the specification and availability of the platform should be addressed to the UKeU Chief Architect.


## 6.     Business Plans and the Template

43. As a result of extensive discussions with UKeU personnel, led by the Learning Programmes Manager but with input from finance, marketing, and platform development, a business plan will be drawn up.

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[*] As the song says, "this much is true".

[†] UML is the Unified Modelling Language, widely used for specifying software systems.

[‡] The details of this will have to wait until the technical reports are released.

[§] This was done and was seen by many UKeU staff as one of the quiet successes of the operation.

[**] This was done in some cases.

[††] It was actually made extremely difficult for early HEI partners to use their own system.

[‡‡] This was only beginning to happen, with one main customer (non UK) when UKeU was closed.

44. The business plan will show the need for financial advance profiled over time, student numbers, other income, costs of modules, and other details. It will also show payback of the advance as a profile over time, assuming things go to plan.

45. Typically marketing accounts for 15% of revenue and the platform and UKeU infrastructure for a further 25%. Delivery costs, return of advance, update and bug fixing, and profit for the HEI, including institutional overhead, make up the rest.

46. An initial development period together with 5–7 years delivery period is normal.

47. It is important to allocate sufficient funds to keep the offering current and relevant. In any case, experience shows that some modules may need early rework. On-the-fly changes are difficult in a distributed e-learning environment.

48. A draft spreadsheet is given at Appendix D.[*] Its simplicity in the form given hides the considerable amount of work that will have gone into its production.

## 7.    The Contract and Related Issues

49. Once an agreement has been reached, based round a spreadsheet, a formal contract is drawn up. A draft is given as Report 10.[†] This covers the development phase, the hosting and marketing, the administration of students by both UKeU and the HEI, as well as financial aspects, ownership issues, and actions should the programme not be successful.

50. UKeU essentially acts as an agent for the HEI, which has to be in control of the delivery and quality assurance aspects of the programme. UKeU thus collects fees on behalf of the HEI.

51. Pricing of a course is by agreement and can vary with customer. The product will be co-branded by the HEIs and UKeU.

52. The product must have associated award of credit and must satisfy the CAQ standards.[‡]

53. The relationship between HEI and student should not be materially less favourable than the norm for the HEI. The product must not achieve a "second rate" image. Quality standards in delivery will apply to both UKeU and the HEI in their handling of students and potential students.

54. UKeU does not seek any Intellectual Property rights (IPR) but is granted a license to use these rights and reuse parts in other programmes, by agreement (but not unreasonably withheld) and with the appropriate payment. If material is developed further by UKeU, then the IP, in that development only, is the property of UKeU.

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[*] No spreadsheet was supplied with the version of the document in the UKeU electronic archive.

[†] See Report 10 and its Annexes for the main variant types of contracts.

[‡] See Report 12 for much more on CAQ and its procedures.

55. There are a number of issues round non-competition. It is in neither party's interest for the other to offer an alternative directly competing product. However there may be some issues about pre-existing agreements or products, although this will affect the value of the programme.[*]

56. The difficult case is when the programme is unsuccessful. Inevitably, contracts spend most time in failure cases. It is hoped that, should numbers fail to meet targets, the parties will negotiate a way forward that allows further work or an extension of the period of the agreement. Termination is never a unilateral right of either side unless a breach condition arises (e.g. if no product is provided for delivery). All possible avenues should be investigated for continuation.

57. Nevertheless, some products will be agreed by both parties as unsuccessful. It is in this case, especially when UKeU has made a substantial investment in development, that some limitations will be placed on the ability of the HEI subsequently to exploit developed material unilaterally.

58. The contract will itself have a number of Schedules. These include specification of the learning product, a functional specification of the platform, a schedule for delivery and update of pieces of learning, details of styles and logos to be used and associated licenses, the business plan, and marketing details.[†]

59. Given the problems that all organisations have with contractual matters, it is good to get people involved with that process, as soon as the business plan is essentially agreed. However, our experience with pilots is that it is wise to finalise the plan before starting the contractual discussions, and for that plan to be approved at a high level within both organisations as this shortens contractual discussions.

60. Inevitably there are detailed finance and taxation details to be discussed. In addition, there will be issues of making information available between the parties. The work done by the pilots seems to have led to formulations that are acceptable to both sides and it is hoped that these will become generally applicable.

## 8.     Support and Training

61. The UKeU learning platform will be new to all the HEIs in the early phases. In some cases authors will have had little previous experience of e-learning development and delivery, and in extreme cases little experience of distance delivery. Tutors may also be new to the area. Finally students will also need some support in their use of the platform, as well as academic and related support.

62. Tutor training material will have three components. Two of these, generic training in being an e-tutor, and training in being a UKeU tutor will be provided by

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[*] There were a number of issues about excluded territories with some of the early programmes.

[†] See Report 10 for further background on HEI contracts and several sample (but anonymised) contracts.

UKeU.[*] The latter will include training on how to use the platform, how to respond to requests and routine housekeeping things such as how to get paid. To this the HEI will need to add training specific to the learning provided – the nature of the course, responsiveness targets for the course and guides for specific activities. The material is actually itself e-learning and one possibility is that it will itself carry credit for some programmes of study. This material will generally be Web-based.

63. Similarly there will be introductory material for students about being an e-student, including acceptable usage policies, and using the UKeU platform, provided by the UKeU in a generic form.[†] This will generally be supplemented by HEIs providing material of a self-test or "am I prepared for this learning" material, or perhaps a guide to etiquette for the specific course. This will also normally be Web based.

64. Ongoing support for students with platform or IT problems, and similar support for tutors and partners and users in general, will be provided by UKeU.[‡] Academic support for students is the responsibility of the HEI.

65. UKeU will help with certain training for authors and deliverers. Familiarity with the platform and its facilities will be provided. Advice on UKeU procedures and templates for production and delivery will be offered. Advice on quality assurance procedures will be provided if required. In some instances, specific design advice and advice in related areas will also be provided but enquirers may be referred to others. On occasions this material will be Web-available but some specific areas may require attending a demonstration in the SE England area.

## 9.  Quality Assurance

66. Report 12 gives a guide to the quality assurance procedures of UKeU. As part of its establishment, UKeU must respect its license from the holding company (essentially the HE community). This requires the establishment of a Committee for Academic Quality (CAQ) which has membership from senior UK HE managers or recent such, and assessors from the QAA, British Library and BBC.

67. The approach followed by the CAQ is to use the HEI structure for quality assurance as much as possible. Where standards are lacking, the intention is to broker with another HEI that has in place the necessary procedures, to see whether the deliverer can adapt them for its own purposes.

68. There are four stages of review. In stage 1 approval, the initial paperwork is analysed for possible deficiencies. Assuming that this stage is passed, the programme can be advertised by the HEI and UKeU using appropriate logos.

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[*] This was done. The charismatic Milton Keynes company Learning Materials Design developed this material – see http://www.lmd.co.uk/UKEU.shtml. It is hoped to make this available to the HE sector in the not too distant future.

[†] Also developed by LMD.

[‡] A Help Desk, run by Fujitsu, was set up in 2003.

69. The review of design is kept separate form that of product although there is the possibility of looping between the two. This is because the costs of development are great and bugs can be fixed faster and more effectively if found at the design stage.

70. Review of delivery is through annual monitoring by the HEI with the results shared with UKeU. We will be able to provide some key data from the platform.

## 10. Monitoring and Delivery

71. Again this is covered in [Report 12].[*] We will expect to use the HEI procedure for annual report, and to share the results in confidence with an action plan drawn up to deal with any problems that arise.

72. We will be able to provide some key monitoring data from the platform. This will include tutor responsiveness, performance of various sub-cohorts, and student activity analysis, perhaps correlated with assessment results. There will also be facilities for students to give feedback.[†]

73. We will generally take the documents provided by the HEI as the basis for any discussions and review. We may however do some "dipstick" quality tests.

74. It is important that any problems that arise, especially with tutors or local partners, are handled fairly, reasonably rapidly, and by agreement. UKeU needs to know if students in an area have had a sub-ideal experience, as it may require wider action than with respect to the specific programme. Similarly, UKeU needs to tell the HEI of any problems arising with partners in other areas.

## 11. Concluding Remarks

75. This document and its annexes hopefully provide a guide for all members of an HEI interacting with UKeU. Whilst reasonably full, it is by no means exhaustive although a linear read may prove somewhat exhausting.

76. The Learning Programme Manager assigned to a programme is the key to getting further information and understanding, and acts as a mentor for a proposing HEI.

77. In addition the various contact points in this document will respond to queries, generally (>90%) within 10 working days, and hopefully in significantly less.

78. Just as students find HEI structures initially daunting, so HEIs involved in pilots have found the procedures rather complex. They have then had a hand in shaping them to make things easier to follow. This process is continuing and we shall continue to learn through feedback from HEIs and customers.

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[*] To some extent only. A full report on monitoring is envisaged for a later round of Reports.

[†] These were provided – and used!

# Appendix A: Initial Countries and Corporate Targets[*]

*Primary Targets*

Brazil
Canada
China
Gulf
Hong Kong
India
Indonesia
Japan*
Malaysia
Philippines*
Singapore
Thailand
Vietnam*

* More long term than short term

*Other Targets*

We will keep a watching brief in the US through partners.

Some countries such as EU countries may increase in importance

The UK will be a major target for some programmes (by agreement)

Other counties in North Africa and the Middle East may also be considered.

Currently there are no plans for the Spanish-speaking world, nor for countries of the former Soviet Union. Other omissions include Australia, New Zealand, and central and southern Africa. However, individual programmes may chose to market in these areas through their own partners.

**Initial Corporate Targets**

These will include government in the UK, corporate HR and related departments, health industry corporates, and oil and gas organisations.

# Appendix B: Initial Proposal Template[†]

This has been moved to Report 12 Appendix I.

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[*] This was originally Annex A of the document.

[†] This was originally Annex B of the document.

# Appendix C: UKeU Services Provided[*]

This section details the various services that are made available to HEIs in the development and delivery of programmes. Most services form part of the percentages of income retained by UKeU. As such they are at risk. Services that are not normally included are indicated.

Should specific services be offered outside that portfolio (for example a significant rights clearance service for a collection of medical slides being digitised), this will need to be legally procured by the HEI. The service will then be provided for a charge. It is open for such costs to be included in the costing of a programme leading to the need for investment, but normal considerations will apply and the business case must clearly indicate this.

## 3.1    Infrastructure

Infrastructure services those concerning the development and delivery of a programme. Normally this will be on the UKeU platform and when this is the case, all the services below are part of the central charges and are indivisible. An exception is when the programmes being delivered are not UKeU programmes (ASP service).[†] In this case, where UKeU is offering its platform for the institution's own programmes, special arrangements must be made.

It is possible for the HEI to use its own platform. In this case none of these services will be available except at cost and the UKeU percentage taken will reflect this. Transfer of necessary administrative data will be by flat files defined by UKeU. Service levels for the HEI preferred platform will be drawn up and monitored as part of the QA procedures and HEIs will be contractually expected to take action to meet them. They will be essentially those that UKeU is contracting to provide in normal circumstances.

Infrastructure includes:

- Specification and design methodologies: The UKeU team working to the Chief Architect will have detailed knowledge of how to specify and design e-learning opportunities including some templates and tools. Their advice and guidance is available to the developers who could be the HEI itself or a third party employed by the HEI (possibly on UKeU recommendation).[‡]

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[*] This was originally Annex C of the document.

[†] ASP = Application Service Provider.

[‡] A number of third party developers were contracted, both companies and universities with specialised content development units. Not all were successful.

- Learning development system: The platform will allow the HEI and its agents to access a set of tools for the development of the learning material. Eventually, a tool to transfer from other learning environments will be provided.[*]

- Security: The platform will include significant features for authentication and authorisation. These will be available at a fine level of granularity. Advice on their deployment will be available.

- Testing: There will be facilities for testing the material produced for conformance to standards and for quality (chasing false links etc.). These will be run routinely by UKeU. They should be thought of as a check rather than a detailed analysis. Should an HEI want a thorough exhaustive test, which may for instance be required if the quality found by this process is poor, UKeU can put the HEI in touch with organisations equipped to carry out such work. It may be worth considering such things within the costing of the course.

- Course delivery: The key to the success of the course. Facilities are outlined elsewhere but what is being offered is a fully hosted, 7x24, secure service that has good facilities for supporting co-operative work, monitoring, acting on events, and reporting problems. The assessment options are in line with those of the sector and include self and diagnostic modes. Assignment management is a key feature.

- Networking: The machines are connected to the Internet through a number of routes with partnerships in place to give good access as required worldwide.[†]

- Brokering to software development: Should the HEI require input from software specialists, for instance in video production and inclusion, UKeU will help facilitate the finding of partners

- Version Control: The computer system allows full partitioning. The development environment will be kept separate from the delivery environment. Immediately previous environments will also be kept apart and available to allow reversion. Versions for resit or intermitting candidates will also be retained. The decision to move version will be a joint one between UKeU and the HEI.[‡]

- ASP/Hosted services: The platform is available to be hired by an HEI for its own purposes but, as indicated above, this is subject to a distinct agreement. Facilities to change screens and look and feel are available as part of that process. It may also be possible to make some more fundamental changes if required. Finally, it may also be possible for the platform software to be run on the HEI's own hardware although there are then licensing and related issues.[§]

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[*] Late in the life of UKeU, experiments were starting with the CETIS RELOAD tool to do just this. See http://www.reload.ac.uk for more details of its current functionality.

[†] However, the "last mile" in some countries remained an intractable problem, even on university campuses of some prestige universities, both in Asia and in Brazil.

[‡] Analysis of this technical area is well out of scope for the current brief.

[§] This never happened.

## 3.2    Sales and Marketing

Marketing services are provided against a plan to spend approximately 15% of income on marketing. The plan is agreed annually between the HEI and UKeU. Unless excluded, marketing is included in the services offered as part of the package. However, a few public good courses, delivered primarily in the UK, will have costings that assume that the HEI is undertaking this function. In some cases the HEI may undertake marketing and this will be built into the plan.

Since most of the UKeU investment is at risk against marketing performance, this is a key component for UKeU and one where we will be concentrating a lot of ongoing effort. Two distinct marketing segments have been identified: the corporate (wholesale) and the individual (retail) segments require essentially different strategies and have different marketing directors responsible for them. Corporate marketing is essentially central whereas individual marketing is largely in territory.

Sales and marketing tasks include:

- Development of marketing strategy: The marketing team will work with the HEI to develop and maintain a strategy and corresponding plan, reviewed annually and agreed between the parties.

- Global marketing: Through events and websites, access to government in the UK and elsewhere, and access to corporate structures, UKeU will market at high levels in global organisations.

- Regional marketing: A structure of regional partners is being developed to address the territories of Section 1. Others may be developed. Local partners will play a full role in the marketing and will need to be provided with appropriate support from UKeU, and in some cases the HEI.

- Retail sales: There is work to be done in moving form an enquiry to successfully matriculating a student into a programme. Local partners will again take on the bulk of this activity.

- Corporate sales: Similarly there is work to be done between a corporate expressing interest in a set of programmes and concluding an appropriate contract. This will be done centrally.

- Governmental and public body sales: There are special requirements in the EU in this area. UKeU will have appropriate knowledge and experience to compete for public procurements.

- Market analysis: UKeU will obtain and analyse market data and discuss with HEIs the possible consequences for their offerings in specific markets.

- Sales analysis: One aspect of market analysis is the actual; sales and its correlation with performance subsequently. The platform will facilitate this.

- Evaluation of marketing campaigns: Similarly, the platform will allow, using techniques that are standard with dot-coms, the analysis of the effectiveness of

specific activities in order to hone the marketing better to produce good numbers of learners.

### 3.3    HEI and Learner Services

These, largely administrative, services are automatically provided and form part of the essential UKeU infrastructure.

The services are:

- Invoicing: UKeU will collect money from learners and provide all the necessary infrastructure for so doing including credit control.

- Routine student administration: UKeU will use rules provided by the HEIs to control the matriculation of students and their administration. It will share data with the HEIs at key points using agreed formats. It will be the first point of contact for students, often through local partners.

- Security administration: UKeU will ensure that students are provided with passwords and other security features and that they follow the code of practice for proper use of facilities. As part of this process, students will be requested to waive some data protection rights.

- Tutor administration: Central facilities will be provided on the platform to monitor, train, pay, and dispose of tutors or markers.

- UKeU will ensure that HEIs are remunerated in a timely fashion and are provided with the information that is needed for them to deliver the academic course. Agreed procedures and service levels will be drawn up. They will apply to both sides.

- Responding to administrative queries: Eventually a 7x24 helpdesk will be provided but initially a variety of in-country and central services will be used to respond to queries. These could come from learners, tutors, or HEIs.

### 3.4    In-Country Services

These are generally part of the standard provision.

They include:

- Provision of UKeU regional centres: UKeU will have in place local support for students that will be administrative, and if required, academic.

- Creating options for HEIs: UKeU will facilitate the appointment of tutors, exam centres and local student support as required. Using the central facilities,

the local management of tutors will be possible and various different patterns of interaction will be possible between HEI and partner.[*]

- Local assessment/exam administration: Should physical assessment be required, UKeU will arrange local permissions and arrangements. The cost of this should have been built into the course and in some cases may involve extra charges from third parties that will need to be met by the HEI if not anticipated.[†]

## 3.5     Additional Services

These are not normally part of the standard contract and will involve charges.

They include:

- Rights management: UKeU can help manage the intellectual property rights (IPR) and facilitate the use of supporting resources in a global or local environment. This may be useful in a resource-rich, expensive content environment where the HEI has little experience of overseas delivery.

- Financial and other modelling: based on market data, UKeU can help an HEI with wider financial modelling and assistance with other related matters, for instance with VAT.

- Full testing for standard conformance and quality: Covered above, this service can be provided.

- Development: UKeU will have access to development partners some of whom have specific expertise such as cultural knowledge for layout for some countries.

- ASP services: See above.

# Appendices D, E and F: Further Material

*In the original document there were further Annexes but they were incomplete.*

- *Annex D: Generic contract between HEI and UKeU. [See Report 10.]*

- *Annex E: Generic template for financial planning. "Being prepared".*

- *Annex F: Policy and standards. [See Report 12.]*

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[*] This was envisaged but never happened. The HEIs seemed keener to organise this themselves; for the low numbers of students on the courses this was not a major problem.

[†] Again, only a theoretical construct. Note that the typical UK MSc course does not have a final exam anyway.