



FLEXIBLE LEARNING - CHARTING A STRATEGIC VISION FOR UBC (Vancouver Campus)

September 2014
Flexible Learning Implementation Team

This report is effectively a written transcript and collation of multiple discussions that have been had with different stakeholder groups across UBC-V. Ongoing discussions are planned with colleagues on both campuses as we continue to evolve the strategy for the University.



Executive summary

Globalization, demography and the evolving careers market are changing the population of learners, while technological innovations and learning research are both empowering and challenging universities' role in higher education.

To understand the impact of these forces, we analyze the extent to which they enable other institutions to unbundle the components of education traditionally delivered by universities, and to challenge the capacity of the university to cross-subsidize between activities. We conclude that in a world in which excellent content and delivery are increasingly available online (and often for free) we must invest in delivering an outstanding education that is far more than content. These same forces may also unlock university access to new learner and program opportunities, and the potential for collaborations that strengthen a university's position in the delivery of higher education. Indeed we are already seeing some evidence of this reshaping.

Flexible Learning is UBC's coherent response to these sector dynamics: (1) strengthening performance in its traditional undergraduate programs through **Place-based innovation in curriculum and student experience**; (2) addressing **adjacent and growing areas of demand** for higher education; and (3) building **partnerships** that allow us to offer our students the most effective learning experiences and widest array of opportunities.

Through 2013/14, our efforts have been targeted at providing better institutional support for faculty members who wish to transform their courses to take advantage of new technology and learning research (***blended transformation in learning***).

For 2014/5, there are three areas of increased focus: (1) *improving the learning ecosystem* – working both to implement short-term fixes to common issues and to facilitate a cross-campus process to explore how our suite of learning technology tools and applications will evolve over the next few years; (2) *continuing and professional education* CPE – the consolidation of a team in the Provost's office to provide integrated business, marketing and policy support to Departments and Faculties interested in developing new applied and 'access' programs; and (3) embedding and leveraging our *new partnership with edX* to enhance platform development, accelerate learning analytics and pedagogy research, fuel CPE growth through global marketing and reach, and continue to shape UBC and peer thinking around Flexible Learning.

The themes of learner segmentation, disaggregation and collaboration offer a strategic framework that we believe explains current innovation in the sector and provides sufficient predictive power to support planning. However, the landscape is characterized by considerable structural uncertainty, so any such framework, and the strategy itself, must continue to evolve as conditions change both within and beyond the University. Discussions around these topics are at the core of our ongoing dialogue with both faculty and students.



Context, governance and outline of the document

UBC's core mission is learning and discovery: in the classroom, through research and from interaction with the community. The University accordingly has a clear strategic commitment to provide transformative student learning.

The way in which the higher education sector can support learning is undergoing profound change, and in the fall of 2012 the Provost launched an initiative to develop a coherent vision for UBC-V in this shifting landscape. We define Flexible Learning (FL) as: *UBC's response to the opportunities and challenges presented by rapid advances in information and communication technologies, informed by the results of learning research and motivated by the objectives of improving student learning, extending access to UBC and strengthening University operating effectiveness.*

An outline Flexible Learning plan was endorsed by the UBC Board and Executive in early 2013, with Leadership and Implementation Teams¹ set up to drive the change program. The teams work closely with faculty members and students through various FL 'networks', and Flexible Learning is discussed regularly with Faculties, Departments, Deans and the Executive, and it is a standing item at the Learning and Research Committee of the UBC Board.

This document seeks to describe the current UBC-V strategy in Flexible Learning, highlighting progress over the first eighteen months of implementation and distilling the key issues and strategic questions that are dominant at this point.

1. *Basis for the strategy.* The first section summarizes the foundation of UBC's strategy in Flexible Learning, exploring the forces at work in the sector and our understanding of learner needs, highlighting UBC's capability foundation and concluding by outlining the strategic framework that derives from this assessment and is shaping our approach.
2. *Ongoing strengthening of UBC's traditional role.* The next section introduces the dynamics of disaggregation that are posing threats to traditional institutions of higher learning. We describe three priority areas of program and curriculum investment for UBC that reinforce the University's position in the face of these forms of unbundling.
3. *Opportunities for revenue and differentiation.* This third section outlines three opportunities for UBC to extend its reach to lifelong and pre-University learners, as well as to strengthen its competitiveness through academic partnerships that enable us to offer students the chance to draw on the 'best of both' in a variety of dimensions.

Flexible Learning represents a currently unrivalled change management challenge for the University in terms of scale, complexity and faculty engagement, exacerbated by the unprecedented external uncertainty. This document accordingly concludes with a consolidated look at the FL strategic agenda (*Section 4*), as well as comments about risk and our approach to program management, in particular touching on communication and evaluation (*Section 5*).

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1. Basis for the strategy

A combination of market forces and internal capability has presented UBC with an opportunity in Flexible Learning to build significantly on its commitment to improving student learning. These conclusions are drawn from work conducted over the last two years, including intensive consultation across UBC, structured desk research and proprietary research in which over 1,300 learners worldwide were polled in the fall of 2012 on their needs and concerns in respect of Flexible Learning. Whilst UBC must continue to monitor sector developments and deepen its understanding of learner requirements, there is clearly a solid foundation for action.

Forces for change

We may be reaching a potential tipping point in higher education, which challenges universities to improve substantially the value of the learning interaction. In turn, this may affect their own economics – through expanded scale (cost, quality), access (revenue) and/or focus (quality).

Student and employer *expectations are rising*, based on a number of factors:

- A growing generational premium on the quality of the interaction rather than the content, and on customized and self-directed experiences;
- Greater emphasis on investing in a university education in order to get a good job, reflected in learner, industry and government discourse;
- In parallel, increasingly specialized and modular careers, with requirements for lifelong upgrading and re-tooling, and indeed for greater graduate flexibility and transferable skills to equip them for more fluid working lives;
- The emergence of outcome assessment as a metric for student and university performance.

The *demographic shape of demand is shifting*, demonstrated by a number of trends:

- The widening profile of learner requirements, with an increasing proportion of older, students, many of whom are working;
- The globalization of education with demand ahead of institutional supply, particularly in developing markets;
- In Canada declining youth demographics are creating greater competition for students.

Government is responding to the changing landscape, although this dynamic is to date less marked in Canada than in many countries:

- Growing reliance on tuition revenue, combined with increasing costs of faculty, facilities and technology, is creating financial challenges, particularly for public universities;
- In British Columbia the government is reviewing university impact and effectiveness to balance demands of traditional urban universities with the increasing need for Northern development and better health care;
- Government support of Flexible Learning-type initiatives is growing, particularly in the US where some politicians argue that online learning offers cost benefits.



These *societal forces are reinforced by disruptive technologies*. This convergence is creating the imperative for, and at the same time enabling, innovation in education:

- New technologies in information distribution and storage (internet, cloud, mobile);
- The entry of technology platforms enabling explosive growth in scalable online learning such as Massive Open Online Courses (MOOCs), the quality of which is expected to improve significantly with continued investment and focus;
- Innovations in automated assessment and adaptive learning;
- Greater transparency in university offers and experience, enabled by technology and social media.

Understanding different types of learners

There appears to be strong and differentiated learner interest in different aspects of what we term Flexible Learning. Our **segmentation** identifies different categories of learners with different needs, each of these posing specific opportunities and challenges for UBC (*Exhibit 1*). All segments however have something in common: at least 65% of them prefer blended learning options over entirely online or entirely face-to-face modalities. This is substantiated by pedagogical evidence that blended learning produces the strongest outcomes, reduces dropout rates, increases exam pass rates and promotes learning as a continuous process by applying multiple and flexible delivery methods that take place over time rather than at a specific occurrence.² Both points are fundamental as they underpin UBC's strategic focus on campus student experience (*Place*) in Flexible Learning. While all segments are potentially attractive to the University as a large public institution, the diversity introduces significant complexity and UBC is currently neither equally well-positioned nor equally well-equipped across the map.

- Many traditional (and younger) University students (*access-driven degree seekers*) are somewhat skeptical about learning and technology in an education context, but they view blended or online learning as enabling access to their provider of choice. In this increasingly competitive global market, UBC is presented with both the opportunity to attract learners who might not have previously viewed UBC as a feasible option and the risk of losing students who now have a wider perceived set of prospective providers. In our survey 65% of current UBC students identified themselves in this segment. The principal challenge accordingly for the University is to ensure that the campus student experience at UBC is as strong as possible in terms of both learning and non-curricular activity. Building this connection is even more important (and difficult) given both the high proportion of commuting students at UBC and the logistical trials of the commute itself.
- Other learners (*convenience-driven degree-seekers*) are driven primarily by convenience, seeking greater flexibility in time, place, pace and content. They are often early adopters of blended and online learning, and are disproportionately adult learners. There is clear opportunity for UBC to expand and strengthen its flexible program offers, particularly in more applied areas.

² Active learning increases student performance in science, engineering, and mathematics. Scott Freemana, Sarah L. Eddy, Miles McDonough, Michelle K. Smith, Nnadozie Okoroafor, Hannah Jordt, and Mary Pat Wenderoth. Proceedings of the National Academy of Sciences of the United States of America PNAS. doi: 10.1073/pnas.1319030111



Exhibit 1
FLEXIBLE LEARNING LEARNER SEGMENTATION

Credentialed required	Degree	Convenience degree-seekers Earliest adopters of online learning driven by convenience	Access degree-seekers Access to prestigious universities outside catchment enabled via online
	Professional certification	Convenience practitioners Affordable local convenience in high-demand areas of study	Access practitioners Access to prestigious providers and portability of past learning
	None	Growth learners Convenient enhancement, professionally or personally	

Time / location flexibility Access to preferred provider

Defining reasons for using blended or online learning

- Not all learners are seeking a degree; many (the segments we have termed *practitioners*) are seeking credentials for professional progression. They generally have a willingness and ability to pay, and some have market-imposed professional development obligations. Their needs for flexibility are correlated with their working status, and they may have additional requirements for prior learning assessment and credit transfer if seeking admission to UBC from an alternate education or training system. Applied learners are currently targeted mainly by Sauder, Education and Continuing Studies – but UBC is highly under-represented in this market space.
- *Growth learners* place value on learning for professional or personal development, and they are integral to UBC’s ability to fulfil its community and alumni engagement mandates. Roughly one third of Canadians participate in non-credentialed learning in a given year.³ Although this segment is large (and growing), it is also most price conscious – and this is only likely to strengthen as ‘free’ online offers proliferate. In order to achieve both market credibility and sustainable economics, UBC must explore how to repurpose for this segment some of the content developed for degree-seekers and practitioners in its core areas of academic strength.

All of these groups are seeking greater flexibility, so that they can take what they want, when and how they want it. **Modularization** of content is an important response to these demands. Education providers, enabled by technology, are offering shorter, discrete units so that students can personalize the content and sequencing of their learning. Modularity enables students to obtain just-in-time delivery at a greater level of granularity (and so digestibility) – relevant for practitioners at career inflection points and for degree-seekers as a means of reducing prerequisites and (if coupled with competency-based assessment) time to completion. Modularity also enables instructors to assemble content from multiple sources (curation).

³ Statistics Canada Access and Support to Education and Training Survey (ASETS) 2008, N=31,000. Actual figures by age: 18-24 26%, 25-34 39%, 35-44 38%, 45-54 31%, 55-64 20%



Strong UBC foundation

UBC has a robust, though fragmented, starting point in Flexible Learning, which has provided an important foundation for action over the past two years:

- Most UBC Faculties have been using technology-enabled learning in some capacity (flipped classrooms, distributed education, online discussion forums, etc), driven by a range of motivations. Medicine, Education and Continuing Studies have historically been among the most active hubs.
- UBC has strong learning technology (LT) experience both centrally and locally. CTLT has played a key role in driving online learning in particular, and some Faculties have created local groups to support Flexible Learning – MedIT in Medicine, the IT group within PDCE in Education and Arts ISIT.
- In addition, there are examples of learning innovation across the institution (many funded through the Teaching and Learning Enhancement Fund TLEF). The most substantial of these is the Carl Wieman Science Education Initiative (CWSEI). The CWSEI provides a platform for evidence-based re-structuring of courses, with the redesign of 100 Science Faculty courses to use blended and active learning techniques to date, coupled with rigorous pre-, post- and ongoing assessment for continuous course improvement. The initiative, which impacted 15,000 unique students last year, is a critical foundation for Flexible Learning at UBC, particularly in consolidating the value of learning analytics and in pioneering the role of expert Faculty-based teaching roles (such as Science Teaching and Learning Fellows, STLFS) to support faculty members in innovation and new modes of instruction.

Flexible Learning at UBC

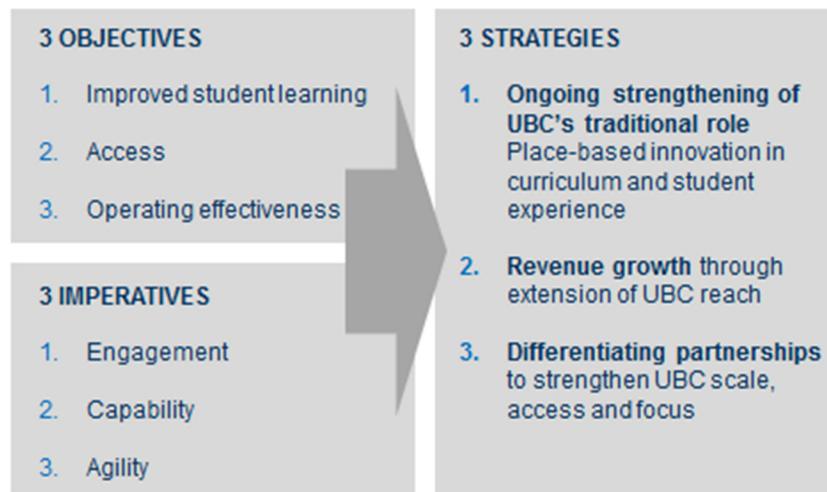
Taken together there is a clear imperative and opportunity for UBC to focus institutional leadership, capability and investment in Flexible Learning as the higher education landscape is reshaped. Emerging from the above-described changes in demographics, economics and learner expectations, profound shifts in the sector are already apparent. Technology and private funding are beginning to open up competition in most functions traditionally controlled by universities – such as content delivery (MOOCs), content aggregation and curation (2U) and certification (badges and LinkedIn). As has been the experience in multiple other sectors transformed by technology, we anticipate that this disaggregation will in time give way to collaboration and consolidation as existing and new players partner to strengthen and extend their propositions and to leverage complementary capabilities. With this context, we have distilled a strategic map for UBC-V in Flexible Learning – which in fact offers a coherent framework for many of the University’s key activities and priorities (*Exhibit 2*).

- We have defined (in order) *three objectives* in Flexible Learning – improved UBC student learning, expanded access to UBC content and greater operating effectiveness. The third objective aims at intelligent application of learning analytics to maximize student learning in a constrained funding environment.



- Through the first year of implementation, we have distilled *three internal imperatives*⁴ for the University to succeed in Flexible Learning: faculty and student engagement; strengthened capability in key areas (including IT, LT and Intellectual Property IP); and greater institutional agility to support the pace of market-responsive change required.
- Arising from our assessment of the external forces, current UBC context and leadership priorities, we have agreed *three core strategies* for the University – (1) **ongoing strengthening of UBC’s traditional role** (Place-based innovation in curriculum and student experience) over the next five years to position the University firmly against the forces of disaggregation, (2) **revenue growth** through the extension of UBC reach, and (3) **differentiating partnerships** to strengthen UBC scale, access and focus. These strategies are all likely to be tightened and amended over time as external and internal development continues. They are described in further detail in the following sections.

Exhibit 2
HIGH-LEVEL OUTLINE OF UBC FLEXIBLE LEARNING PROGRAM



⁴ An internal commitment, capability or structure that must be in place in order to succeed



2. Ongoing strengthening of UBC's traditional (undergraduate) role

The first strategy is focused on the next five years, and builds heavily on strategic and operational activity well underway at UBC. Defining the priorities for UBC in this context requires a model of the functions that universities have traditionally provided, specifically in the context of undergraduate education (effectively a value chain). We can then explore which of these are most secure or vulnerable at UBC, and prioritize action accordingly.

The role and vulnerabilities of universities in higher education

We have distilled seven core categories: (1) *recruiting and selection*, a critical function given its impact on student experience and reputation; (2) *development and delivery of content*, which have strong linkages with research, involving multiple pedagogies; (3) *general learning*: intellectual maturation, critical thinking and reasoning; (4) *skills development*, including writing, presenting, team work; (5) *development of personal and professional networks*, for many students the most important benefit of attending university; (6) *assessment*, both formative and summative; and (7) *certification*, whether through credit, degree, award, letter of recommendation or other. While all students receive value in each category, asking individual students and alumni to identify the most important produces answers in all categories.

We expect over the next several years that traditional university offerings will become unbundled along a number of axes and made available to learners in smaller units, more customizable configurations, more specialized contexts and with greater schedule flexibility. The substantive cross-subsidization inherent in the financial model of most universities, including UBC, is threatened by such **disaggregation**. There is already evidence of disaggregation along all of the seven functions (*Appendix A*):

- At one level MOOCs can be seen as a delivery, networking, assessment and certification play. So far, the courses appear to be acting as complements rather than substitutes for university students, but the providers (Coursera, EdX etc) are innovating aggressively to find sustainable business models and the space is likely to evolve much further. It is possible that the real relevance for universities however is the potential to interface scalable MOOC platforms with campus Learning Management Systems, or indeed the facilitation of academic collaboration across institutions.
- Minerva is a privately funded (\$25 million) venture in which the internet is being used to enable a new university experience, from admissions to content to course experience to course structure. Elite cohorts of students will move around the world to gain immersive international context, 'piggybacking' on existing university infrastructure and interacting online with faculty based at the Keck Graduate Institute KGI in California. It is admittedly a highly targeted play, but it demonstrates the power of technology to completely redefine the campus university.
- Mozilla Open Badges provides a platform for parties to issue unforgeable certificates of accomplishment (badges) to individuals. Online learning providers are issuing badges, and LinkedIn is displaying these. The objective in this space is to augment or supplant the role currently held by university-issued transcripts and recommendation letters.



- 2U is an education technology company that partners with top universities to create new, and translate existing, programs online. Many universities, especially in the US, are choosing not to develop these skills in-house but rather to rely on experts in this modality to drive their innovation. In these cases one could argue that disaggregation is being accelerated by institutions that recognize their lack of capacity and capability to compete.
- Pearson is playing across the value chain both independently and in collaboration with many others, publishing content, providing assessment services on behalf of universities and innovating in adaptive learning technology that by some standards reduces the need for instructor interaction.

UBC's response – three priorities

We have accordingly defined three strategic priorities for the University that we believe constitute a further strengthening of UBC's role in the face of these forms of disaggregation over the next five years:

1. **Blended transformation in learning.** Blended learning is at the core of Flexible Learning at UBC because it is demonstrably the most effective teaching modality, and critically it combines the benefits of technology with the strategic UBC advantage inherent in Place. Focus on blended learning reinforces UBC's proposition to students in fundamental ways, particularly in content delivery, learning, skills development and networking. Examples include flipped classrooms and other forms of active learning, reduced face-to-face time courses and greater integration of open content (including MOOCs) into courses at UBC.
2. **Place, personalization and student experience.** In a world in which excellent content and delivery is increasingly available online (and often for free) it is critical that the University continue to invest in its student experience to reinforce the value of campus education at UBC, particularly given the commuter realities. This priority pivots on Place and recognizes the growing importance of personalization to learners. It is aimed at bolstering UBC's proposition in terms of general learning and socialization, and we are working closely with students to define the highest impact actions. Ideas range from curriculum changes such as new Minors and changes in pre-requisites that enable greater student control over program pathways to targeted improvements in student services.
3. **Strategic program transformation.** We believe that technology and changing societal expectations create opportunities for fundamental and programmatic discipline-based change. Examples include restructured degrees with greater 'just-in-time' modularity rather than a block four or five years, accelerated three-year or dual-degree options or programs built around substantive co-op experience. There is a strong need for innovation and differentiation in an increasingly competitive and global sector, and the University needs to invest thoughtfully in program transformation where opportunities to redefine education in relevant ways for learners and employers align with areas of distinctive excellence and Place-embedded 'right to own' for UBC. This is an area in which Tier 1 universities in the US are investing heavily; UBC cannot afford to be left behind.



Strong traction to date

UBC has made solid progress against each of these priorities (*Exhibit 3*). Some activity was well-advanced before the launch of Flexible Learning, for example the Carl Wieman Science Education Initiative, the introduction of broad-based admission to align recruitment practices with UBC focus on student experience and the creation of the Vancouver School of Economics. Much has also happened in Vancouver since the inception of Flexible Learning at UBC, including the blended transformation of courses impacting c.30,000 enrolments supported by a realigned CTLT organization. CTLT and UBC IT have improved the operational stability and user experience with Connect, and are currently reshaping their teams to provide a more seamless experience for Central support of learning technology. UBC has to date invested about \$5 million (\$1 million spent; \$4 million committed for the next two years) in Flexible Learning, with a significant portion of that amount spent on the creation of FL Liaison roles to ensure faculty-facing linkages between CTLT and Faculties in the implementation of the blended transformation. Also of note are the successful runs of UBC's first four MOOCs (Useful Genetics I and II; Climate Literacy: Navigating Climate Change Conversations; Introduction to Systemic Program Design; Game Theory I and II), followed by the partial incorporation of those MOOCs into on-campus courses.

Exhibit 3

BROADER UBC PROGRESS AGAINST FL PRIORITIES TO DATE

Priority	Progress
Blended transformation in learning	<ul style="list-style-type: none"> • Carl Wieman initiative – learning goals and assessment, focus on interaction (100 courses transformed; 15,000 students) • 2 terms of FL course transformation (target c.30,000 enrolments) • 4 MOOCs launched and ongoing • Realignment of CTLT as a Faculty-facing service organization • Introduction of Professor of Teaching
Place, personalization and student experience	<ul style="list-style-type: none"> • Experiential learning • Broad-based admission • Major infrastructure improvements, including student housing commons • Vancouver neighbourhoods • Campus animation (e.g., public realm)
Strategic program transformations	<ul style="list-style-type: none"> • Budget model in place (revenue centres) • Business capability building (integrated Finance model in Faculties, SDS) • First successes (e.g., VSE)

Focus of action

However there is of course a substantive program of activity ahead against these priorities, which recognizes the need for UBC both to build capability (Faculty innovation in programs and courses, institutional agility, IT and LT capacity, supportive IP policy) and to achieve **practical student- and faculty-facing impact on programs, curriculum and services**.

- UBC-V will continue to drive and support the blended undergraduate transformation, increasingly targeting new investment at areas where UBC needs to develop, and where



sector innovation is most active (e.g., reduced time face-to-face learning). This will remain the focus of the University's efforts and investment in Flexible Learning, with pedagogical research and learning analytics increasingly integral to ongoing innovation. This priority also encompasses a growing focus on the configuration of campus space (within and outside of classrooms, physical and digital, formal and informal) to support the learning and networking demands of both students and instructors.

- UBC will invest strategically in MOOCs that have value for the University in terms of reputation, recruitment and/or institutional learning, and we are increasingly seeking opportunities to integrate this content into UBC campus courses. The current MOOCs in development epitomize this approach in that each combines UBC excellence, Place-based advantage and global learner demand (The Global Water Crisis; Reconciliation through Indigenous Education; Foundations of Chinese Thought; Forests, Poverty and Livelihoods: Current Topics from across the Developing World).
- The other two priorities (student experience and program transformation) are also integral to our success and the plan is to apply increasing attention to these over the course of 2014 and beyond. Particular areas of focus this year include prioritization of curricular and program changes that will deliver big wins in terms of personalization from the student perspective and the launch of a Faculty-driven process to identify and support the highest-impact strategic program transformation opportunities across the University.

Underpinning all of these actions is determined activity in three areas to strengthen ***institutional capacity*** to drive forward in Flexible Learning:

- Investment in supporting and strengthening Faculty and Department capability through faculty professional development, continuance of FL liaison roles to align faculty and CTLT planning and execution around the blended transformation, creation of a Learning Technology LT Hub to provide a single point of LT contact for faculty into CTLT and UBC IT, and introduction of learning technology 'rovers' to support LT in practice;
- The creation of a longer-term plan to frame both pragmatic changes to the current 'learning ecosystem' (the LMS, interfacing software, tools, service and support) and more fundamental evolution required over the longer term;
- Innovation in flexible assessment and accreditation, with a particular focus on outcomes-based assessment, working in parallel with Senate to evolve the University's policies in terms of accreditation and program approval.

Creating the required alignment, bandwidth, capability and agility across the University is foundational. FLIT team members in Vancouver work together on a daily basis, meeting regularly with faculty members, Deans, the Flexible Learning Leadership Team, the President and the Executive to review progress and amend direction as necessary.



There are a number of key questions on the agenda at this point:

- How does the Faculty operating model need to evolve to reflect the pressures and new norms of Flexible Learning (e.g., team teaching; different teaching roles in blended modalities; merit, promotion and tenure practices)?
- What are the most effective ways to engage with faculty members around Flexible Learning program and curriculum change? In what ways should UBC incentivize faculty commitment?
- What role do fully online courses and programs have at UBC, either as a route to generating revenue growth through enabling access for part-time (UBC or non-UBC student) learners or increasing flexibility (and so for example accelerating degree completion rates) for current students? Is this an area in which UBC should be looking outside the University either for expertise or capacity?
- What are the Flexible Learning implications in terms of Place and space? Beyond shifts in classroom space configuration and design, what are the longer-term trends and options around the amount, structure and location of campus space?
- How do we secure the sustainability of flexible courses at UBC, once the faculty member(s) driving the initial transformation move on?



3. Opportunities for revenue and differentiation

As the impact of disaggregation becomes clear, so too we expect different patterns of collaboration and consolidation to emerge as providers seek to redefine, expand or strengthen their propositions, either independently or in partnership with other players. A common view is that many universities and colleges will not survive this reshaping of the landscape, and that the specialization and tiering across higher education institutions may become yet sharper.⁵ Even the strongest institutions are unlikely to be immune to the structural and financial pressures that accompany these shifts. In such an environment, it is critical for UBC to be exceedingly clear on its sources of sustainable differentiation, both regionally and globally.

Three opportunities for UBC

We believe that UBC has three such opportunities enabled by technology and changing societal expectations. All of these priorities seek to leverage UBC's regional pre-eminence, international reputation and Asian gateway position to extend its reach across more of the learning continuum both independently and in collaboration with other institutions. These structural actions may have longer-term (5- to 10-year) impact than those described in Section 2, but steps need to be taken now in order to put in place the needed capabilities and infrastructure:

1. **Strategic expansion of continuing and professional education (CPE).** This is the growth of new and existing UBC programs to create a lifelong learning continuum at the University, with a particular focus on practitioners. There is clear learner demand (both locally and internationally) and we believe that there is the potential for revenue diversification for Faculties. This priority is firmly aligned with the government jobs agenda and it is integral to community and alumni engagement, strengthening UBC's focus on practical skills acquisition, industry networking and accreditation for career progression. Development emphasis is likely to be on career-oriented Applied Master's programs that can be repurposed where possible into Certificates (both credit and non-credit), and on expanding 'off-peak' (weekend, evening, summer) access to a coherent set of excellent UBC academic courses, with consequent flexibility benefits for current students.
2. **Expanded and coherent bridging.** Bridging enables the University to attract and recruit the best students in an increasingly competitive and fickle world, securing both scale and quality of learner flows to UBC. Current discussions in Flexible Learning are focusing on using UBC MOOCs as a recruitment tool, investing in Prior Learning Assessment PLA in order to strengthen UBC's ability to target non-traditional (and international) students and expanding UBC's summer programs. There may also be scope for innovative partnerships with schools that enhance opportunities for younger students to access university content.
3. **Targeted growth in academic partnerships** to strengthen program quality, share cost and/or increase UBC's student reach. Academic partnerships are clearly not a new phenomenon, but the opportunities enabled by technology and the imperatives suggested by shifting sector dynamics do introduce a new lens on such associations. There is

⁵ MOOCs' disruption is only beginning. Clayton M. Christensen and Michelle R. Weise. Boston Globe, May 9 2014



growing evidence of innovative collaboration as the sector evolves, from the creation of MOOC consortia partnering long-standing rivals such as Harvard and MIT, to the emergence of self-formed peer study groups, both face-to-face and online, around MOOCs. Notwithstanding the challenges inherent in academic collaboration, we believe that there are some exciting possibilities for UBC, both globally and regionally. UBC's recent decision to join edX at the highest level represents a critical opportunity to test the value of Flexible Learning partnership with a group of Tier 1 and peer global institutions.

Solid foundation in these priorities

UBC is building from a strong base across these three priorities. The University delivers a large number of CPE programs across its Faculties (notably Sauder, Education and Medicine) as well as through Continuing Studies. The launch of Vantage College has created a pathway to UBC for high-performing international students, and enrolments have doubled in the Vancouver Summer Program, that provides a mechanism by which international university students can take courses at UBC in the summer months. There are a wide set of academic partnerships across the University, many with international peers at program level, some of which encompass a dual degree option. UBC also plays a lead role in many regional partnerships, including the Distributed Medicine Program. However the scope of opportunity in each of these priorities is far from fully leveraged, and is subject to even greater uncertainty than the program and curriculum priorities identified in the previous section.

Strategic expansion of continuing and professional education CPE

In order to fully capitalize on the opportunity in continuing and professional education, the University needs to reshape fundamentally its approach. This transformation needs to be viewed as a window of opportunity given the increasing levels of market focus and competition. Based on discussions with faculty across UBC and with peer providers (notably University of Washington Educational Outreach, with revenue and profit of over \$160m and \$60m respectively), UBC has decided to build an ***integrated CPE support team for the University***, based in the Provost Office, to work in close partnership with Faculties in developing both applied and 'access' programs. Leadership commitment is clear, and momentum is strong and growing.

The task for the University is to create and capture markets at the intersection of industry / learner demand, UBC strength and 'Place'-based advantage (for example mining or 'clean energy' engineering, policy and economics, data science in health, communications). Applied programs in particular, by the nature of their target learners and their economics, are likely to be both highly flexible and global. The bar is accordingly extremely high in terms of defining and delivering truly differentiated programs for UBC. The CPE 'incubator' is currently working with a number of Faculty-embedded teams to consolidate and strengthen new (or relaunched) program concepts and to provide targeted business, marketing and policy support to accelerate time to market.

Work is well underway in parallel to address the significant organization and perception challenges attached to this priority, equipping the new CPE support team to deliver on the profit opportunities, streamlining the existing Continuing Studies lifelong learning business into a cost recovery position, and building the market credibility of UBC in these growth areas. Vantage



College offers relevant insight as to how to achieve the requisite balance of business focus / agility / pace and academic / Faculty connections as the CPE incubator is built.

Expanded and coherent bridging

As UBC consolidates its experience from important step changes in bridging, notably the launch of Vantage College and the explosive growth in the Vancouver Summer Program, there is clearly an opportunity for the University to take a more considered, coherent and expansive look at bridging. Technology advances and related changes in teaching practices enable innovation along this axis, including online delivery, modularization and distributed teaching. We are currently assessing the scope and nature of demand for summer programs in particular, and will work with associated units across campus to recommend a strategy and organization model for the University in **bridging for high school students**. Separately we will also this year explore the merits of **prior learning assessment PLA** as a mechanism for creating a bridge to UBC for students with ‘non-traditional’ profiles. Many institutions already rely upon PLA in recruitment, and the expectation is that student demand will only grow as alternatives to typical accreditation practices (badges, modules, MOOC certificates etc) grow.

Targeted growth in academic partnerships

Just as we are collating and characterizing examples of disaggregation, we have distilled three possible patterns of collaboration and consolidation – each of which we believe enables improvement on the critical dimensions of scale, access and focus (*Exhibit 4*).

Exhibit 4

POSSIBLE PATTERNS OF COLLABORATION AND CONSOLIDATION

Partnerships	Distributed networks	Integrated systems
Description		
<ul style="list-style-type: none"> • Inter-university partnerships that create opportunities for content sharing, co-teaching, credit transfer, student / faculty mobility • Scope for co-research 	<ul style="list-style-type: none"> • Online delivery of ‘hub’ university content, with F2F interaction in local institutions • Possible capstones at hub • Research likely focused at hub 	<ul style="list-style-type: none"> • Co-ordinated specialization (complementarity) across institutions / campuses by discipline or learner type (shared administration possible) • Likely redistribution of research
Primary driver(s)		
<ul style="list-style-type: none"> • Quality (reputation, recruitment) • Student and faculty mobility and diversity 	<ul style="list-style-type: none"> • Access (student reach) • Local, context-dependent specialization and interaction 	<ul style="list-style-type: none"> • Less duplication in system cost • Quality through focus (discipline or learner type) at campus level
Examples		
<ul style="list-style-type: none"> • UBC / Sciences Po degrees • Open learning consortium (UBC, SFU, UVic with TRU) • EdX, Coursera • Ontario Online 	<ul style="list-style-type: none"> • UBC Medicine • Minerva • Self-formed study groups around MOOCs 	<ul style="list-style-type: none"> • US state systems (e.g., California, Wisconsin) • UBCV-UBCO • Ontario streamlining plans (?)

Inter-university partnerships already abound at UBC and elsewhere. Well-conceived and well-managed, they can create significant value in terms of quality from both student and faculty perspectives. *Distributed networks* can deliver impact in terms of access and local context-dependent application and immersion. They rely though on the existence of a natural hub, and



there are of course significant issues of transition. *Integrated systems* are a more advanced form of collaboration, with the most potential for cost benefit, and likely need to be driven by either government or shared administration. Arising from this assessment, and following structured discussion with the Flexible Learning Strategy Network and Leadership Team, the UBC Executive and the Learning and Research Committee, we believe that there are three collaboration opportunities for UBC:

- ***Deliberate growth in global program partnerships.*** These are likely to be Department-led partnerships with world-leading peers (e.g., joint degrees, co-teaching), and their potential is both enabled and enriched by technology. There is clear learner demand (quality of programs, diversity of students, mobility) and there may be some cost reduction potential (such as shared content development or delivery). UBC already has some high-impact traction (e.g., dual degrees with Sciences Po, which have transformed the capacity of UBC Arts to recruit its top-choice students). We are working with the Deans to explore whether there is scope to accelerate progress in the most strategic FL-linked opportunities, and to understand how the University can more broadly support partnership activity.
- ***Strategic global Faculty and University-level alliances.*** These alliances are intended to complement program-level partnerships and provide umbrella benefits such as accreditation, capability collaboration co-branding. In addition to the partnership rationale described above, these connections have the potential to strengthen reputation and even institutional stability through globally distributed critical mass and credibility. UBC also has the capacity to leverage its Asia gateway positioning (and existing set of relationships) to create uniquely attractive alliance(s) from learner and faculty perspectives. The possibility of dual language degrees has been raised by the Board. The risks of being left out of the winning global network(s) are considerable, particularly as there may well only be space for one Canadian institution in a given alliance.

The most immediate opportunity for institution-level collaboration around Flexible Learning is presented in UBC's recent decision to become a ***Contributing Charter Member of edX***, joining the Advisory Board with 9 other top-tier universities, including edX founders Harvard and MIT. This partnership offers scope for innovation and collaboration along multiple axes (platform development, learning analytics and pedagogy research, marketing and strategy) and through multiple channels (MOOCs, continuing and professional education – a firm edX priority – and on-campus course delivery such as small private online courses (SPOCs)). We believe that the opportunities for institutional learning, increased program penetration, enhancements to the University learning ecosystem and heightened UBC reputation are substantial (possibly unparalleled). The Flexible Learning Team is focused now on engaging UBC faculty and LT / IT professionals to ensure that we both contribute – and benefit – from the partnership as effectively as possible.

- ***Proactive regional system synergies.*** There appear to be some interesting academic partnership opportunities with BC institutions, in particular given the strength of the existing articulation infrastructure and the scope for UBC leadership as the sector responds to the external dynamics. The Executive has prioritized a few of these based on learner proposition and alignment with the government agenda. Partnership with BCIT, either through program collaboration (e.g., joint programs or dual credential pathways) or



through capability collaboration (in CPE and/or learning technology), may be the most attractive. We have initiated dialogue with faculty members at both BCIT and UBC to discuss how to leverage their complementary strengths, and there is growing interest in exploring various axes of partnership. UBC Okanagan is already working with UNBC to consider possibilities in creating distributed or co-teaching networks in specific disciplines. We are debating the merits of a renewal of BC Open through closer collaboration with provincial peers as UBC considers how to approach the online-only opportunity, which is currently underdeveloped in British Columbia.

There are some critical outstanding questions surrounding these structural plays, and we will continue to work through these in the coming months:

- What is the most effective way to segment the market in continuing education between specific UBC programs and Faculties and an integrated continuing education unit?
- What are the most valuable ways for the Vancouver and Okanagan campuses to work together to leverage additional opportunities for program or capability collaboration across UBC?
- How real are the pressures for universities, and UBC in particular, to streamline courses or even specialize by discipline as the pressures for scale and focus in particular continue to strengthen?
- What are the implications of greater global partnership activity for the flow of international tuition-paying students to UBC?
- And perhaps most fundamentally, how can UBC create the capacity (and capability) at faculty, Department, Faculty and University levels to tackle these new and highly stretching opportunities?



4. Strategic priorities and focus for 2014/15

Taking these two sets of priorities together, we have defined a consolidated list of **six strategic priorities for UBC in Flexible Learning** – (1) blended transformation in learning; (2) strategic expansion of continuing and professional education CPE; (3) place, personalization and student experience; (4) expanded and coherent bridging; (5) strategic program transformations; and (6) targeted growth in academic partnerships (*Exhibit 5*).

Some of these extend beyond a narrow construal of Flexible Learning, but in our view are connected by the fact that they represent a deliberate response to the present changes and challenges in the higher education landscape – with changing expectations and technology in each case both enabling and creating the demand for action. We are confident that, well executed, these actions provide UBC with a strong position as the sector continues to shift; there is low probability that any will turn out to be an ill-conceived focus for the University.

Exhibit 5
UBC FLEXIBLE LEARNING AGENDA (2014 and ongoing)

Priority	Next steps
1. Blended transformation in learning	<ul style="list-style-type: none"> Continued support / funding of program and course innovation, increasingly targeted to integration of open content (including UBC MOOCs) and reduced F2F time 4 new MOOCs, clearly aligned with UBC strategy / strengths Continued LMS investment and short-term improvements Better integration of CTLT / IT Design of longer-term learning ecosystem LES (blueprint, roadmap) Faculty professional development Scenario assessment and structured testing around space
2. Strategic expansion of continuing and professional education CPE	<ul style="list-style-type: none"> Building of Faculty-facing incubator in Provost Office to accelerate growth Streamlining of program approval processes Definition of funding model (dividends to Faculties; revenue allocation) Support and funding for Faculties to develop priority University program plans in applied, access and online markets Targeted tuition review Development of industry connections to help drive growth Alignment of current non-credit programs with Faculty priorities
3. Place, personalization and student experience	<ul style="list-style-type: none"> Senate / policy reform to increase curriculum / accreditation flexibility Continued program development aligned with personalization priorities identified in surveys
4. Expanded and coherent bridging	<ul style="list-style-type: none"> Development / implementation of integrated high school bridging strategy (Faculties, Continuing Studies, Vantage, ISI) Assessment of potential in prior learning assessment
5. Strategic program transformations	<ul style="list-style-type: none"> Business / operational support for Faculties to develop plans in 3 – 5 priority programs
6. Targeted growth in academic partnerships	<ul style="list-style-type: none"> Alignment of resources to support edX partnership Targeted testing of BCIT partnership potential Assessment of possible University-level (cross-program) partnerships beyond edX

This agenda at one level constitutes the work program of the Flexible Learning Implementation Team FLIT, but it more importantly represents UBC's current strategic program vis-à-vis Flexible Learning. While deliberate activity is planned and mostly underway in all of the areas outlined above, three efforts are arguably the focus of leadership time and resource in the coming academic year, in addition to the ongoing implementation of the blended transformation:

1. **Improving the learning ecosystem.** Responding to feedback from faculty and staff, teams in CTLT and UBC IT are working both to implement short-term fixes to some common issues and to facilitate a cross-campus process to explore how our suite of LT tools and applications will evolve over the next few years.



2. ***Developing new continuing and professional education programs.*** The CPE team in the Provost's office will continue to provide integrated business, marketing and policy support to Departments and Faculties interested in developing new applied and 'access' programs. In parallel the team will work to put in place the ongoing organization and processes to facilitate market-responsive and sustainable program growth.
3. ***Joining edX.*** In addition to launching the next 4 UBC MOOCs on the edX platform, the team will explore how best to leverage the collaboration opportunities inherent in this level of partnership – whether these be in platform development, learning analytics and pedagogy research, marketing of CPE programs, or ongoing evolution in UBC's Flexible Learning strategy.



5. Program and change management

The challenges of defining the right strategy are substantive, but the challenges inherent in managing the associated change are arguably greater, and this is particularly true for Flexible Learning given the scale and scope of the internal change agenda, continued uncertainty over external developments and the nature of governance at a university.

Risk considerations

There are a number of risks surrounding the program. Some are external: for example, the uncertainty over the pace of change in learner expectations and institution response, the ability of ongoing innovation to improve the quality of online learning or the entry of private players that are able to provide substantively greater value in any of the functions of a traditional university. We believe that the strategy aligns as well as possible with market uncertainty: program and curriculum priorities seem fairly robust to landscape shifts, the launch of an integrated support unit in CPE feels like a natural (and highly timely) extension for UBC, and partnership ventures will be subject to thoughtful strategic analysis and driven by an increasingly internationally-focused leadership team. The more concerning and controllable risks are the internal ones. Each of these has a clear associated action plan, discussed on a regular basis with Deans and the Executive, and there is ongoing assessment of the potential impact of these factors:

- The performance of the Learning Management System, and the ongoing responsiveness of academic IT (the learning ecosystem) to faculty and student requirements;
- Faculty, Department and faculty member capacity, capability to manage change and capacity to learn new working skills;
- Faculty member engagement in learning innovation and Flexible Learning more broadly.

Communication

Together with sound program management coordinated by the FL Implementation Team in Vancouver, we are placing greater importance on communication as we move beyond the planning and design phase of implementation. The FLIT is now working with a dedicated communications professional as well as a faculty 'FL champion' to plan and implement a proactive and coordinated approach to two-way communication. The program has the explicit objective of building faculty and student awareness, understanding and engagement with Flexible Learning. The current plan includes faculty blogs and thought-pieces, structured academic working sessions, faculty and student involvement in all FL Networks, and a series of discussion events, kicked off in the spring with a forum hosted by UBC Flexible Learning on The Changing Pedagogy and Economics of Higher Education⁶. With the edX announcement, UBC will also seek to expand Flexible Learning engagement through external communication in order to speak to our positions of clear international strength: implementing a large scale blended transformation and using evidence-based evaluation of that transformation to drive further improvement of the learning experience. Our goal is to achieve recognition as a hub for academic exchange and collaboration in this area as the sector continues to evolve.

⁶ <http://flexible.learning.ubc.ca/digital-learning-blog/bates-and-grimson-video-and-slides/>



Evaluation

Objective tracking of Flexible Learning is critical and we have a number of mechanisms in place. Market developments are monitored and summarized for distribution weekly through CTLT's "Flexibytes". Learner and faculty perceptions are being tracked through a coordinated set of UBC-only and industry surveys, enabling both targeting of particular University issues and benchmarking, and these inputs are reflected in the shape and specifics of the Flexible Learning action program. The learning outcomes of the blended learning course transformations are being assessed through carefully constructed measures, and then shared and synthesized through an evaluation committee within CTLT for onward discussion and debate with Faculties, Departments and faculty members. Finally we have identified 10 or so institutional metrics (a 'dashboard') that capture progress against the three Flexible Learning objectives (strengthened learning, access, operating effectiveness). The first report against this dashboard will be available by December 2014.



Appendix A

Selection of Players Acting to Disaggregate Value Students Now Get From Universities

