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European Distance Learning Guidelines European Quality Link (EQUAL)



Launched and hosted by the Brussels-based European Foundation for Management Development (efmd), EQUAL is the international association of quality assessment and accreditation agencies in the field of European management education. The European Quality Link (EQUAL), the European association of national accrediting bodies, has as its main objective the continued improvement of quality in business schools.

PROPOSALS FOR A NEW SECTION 12 OF THE EQUIS DYNAMIC MODEL SPECIFICALLY FOR DISTANCE LEARNING PROVISION

12. DISTANCE LEARNING

- 12.1 System design - the development of an integrated approach
- 12.2 The establishment of academic standards and quality in programme design, approval and review procedures
- 12.3 The assurance of quality and standards in the management of programme delivery
- 12.4 Student development and support
- 12.5 Student communication and representation
- 12.6 Student assessment
- Appendix 1 Self audit questions

The purpose of the guidelines

These EQUIS guidelines offer advice on assuring the quality and academic standards of programmes of study provided through distance learning. For the purpose of these guidelines, "distance learning" has been taken to mean a way of providing education that involves the transfer to the student's location of the materials that form the main basis of study, rather than the student moving to the location of the resource provider.

There is considerable debate, nationally and internationally, about appropriate terminology, and a number of different terms are commonly used which refer to the same or similar sort of activity. There is also great diversity in the large number of actual arrangements – and even more in potential arrangements – to which these guidelines are directed. As the nature of institution-centred and of collaborative provision develops and changes, and as the potential for distance learning is explored further, the boundaries between different forms of higher education are becoming less easy to recognise.

These guidelines do not assume that distance learning is a separate and unique form of higher education around which there are clear, let alone fixed, boundaries. Nor is it assumed that all distance learning has uniform characteristics. Nevertheless, a large and diverse body of current provision, although often described using different terms, is readily identifiable.

Programmes of distance learning have some basic features in common which broadly distinguish them from institution-centred modes of learning: physical proximity is not a requirement of study and programmes made available through distance learning all involve some degree of physical separation of the student (the learner) from the institution responsible for providing the teaching and making the award.

There are also a number of ways in which teaching and learning activities to support students on distance learning programmes of study involve distinctive divisions of labour and allocations of responsibilities.

System design, programme design and delivery, student development and support, student communication and representation, and student assessment all raise particular questions for institutions about the ways in which they 'manage' teaching and learning to ensure that the quality of provision and security of academic standards are as they need to be. The purpose of the present guidelines is to help institutions to check the soundness of their arrangements for these aspects when the programmes of study are offered through distance learning.

Definitions and dimensions of distance learning

Throughout these guidelines, the terms 'providing institution' and 'provider' are used to indicate the education institution that is responsible for designing the distance learning system, for designing and delivering programmes of study and for the academic standard of the award granted upon successful completion of that programme. Other terms are used which are intended to convey a function – such as local agent (where the function is normally limited to administrative or organisational activities), local tutor, travelling teacher – for which other words could be substituted according to choice but which are expected to be readily understandable.

Distance learning is approached in many different ways. These guidelines have not been designed to apply equally in all respects to every individual arrangement. They take a generic view based on underlying principles or precepts. But in doing so they also take particular account of a number of approaches which, while not necessarily present in all arrangements, do frequently occur in many of them. The component elements of these approaches, and the meaning given to them, are set out below as four dimensions of distance learning. The dimensions do not refer to different models of distance learning and should not be construed as setting out alternative forms or distinct systems of distance learning. They refer to certain distinguishable aspects that are commonly found, under varying labels, as components within

systems of distance learning. The terms used to refer to four dimensions of distance learning are as follows:

Materials-based learning. This dimension of a system of distance learning refers to all the learning resource materials made available by the programme provider to students studying at a distance. The range and diversity of materials provided can be great. It may include printed, audio or audio-visual material, experimental equipment and material on the world wide web and other electronic or computer-based resources. Materials forming the basis of study may also be drawn from local public providers or resources accessible locally – as with local libraries, local book suppliers or information on the world wide web. The scope of materials provided may range from statements simply of syllabuses and learning outcomes to complex collections of multi-media materials structured to support self-study. The methods for distributing materials to form the basis of study include personal delivery to students by travelling teachers, despatch to the student through the post, distribution through electronic communication and personal collection by the student from a distribution point.

Programme components delivered by travelling teachers. This dimension refers to staff of the providing institution travelling on a periodic basis to the location of the student to deliver components of the programme. The delivery may be concentrated into a period of intensive classroom-based study for a group of students or be arranged on a scheduled basis for an individual student. The scope of the functions carried out by travelling teachers may include initial orientation; delivery of learning materials; intensive teaching of the programme; tutorial support; student development and guidance; assessment; and gathering feedback. The operations of travelling teachers may be supported and supplemented by a local agent.

Learning supported locally. This dimension involves the providing institution employing persons specifically to undertake certain defined functions for the local support of students following the programme. It may involve administrative tasks for which a local agent is contracted and/or specified teaching functions for which a local tutor is engaged. An example of the latter might be the provision of residential weekend workshops or the like.

Learning supported from the providing institution remotely from the student. This dimension refers to defined support and specified components of teaching provided remotely for individual distant students by a tutor from the providing institution. The forms of communication between the tutor and student may include postal correspondence in print or by audio or video-cassette, telephone, fax, email and the Internet. It may be solely between tutor and individual student or may include voice, video or computer-based conferencing. The scope of the teaching may be limited to defined components of the programme or form a larger and more open-ended component.

How the guidelines are structured

The guidelines are arranged under six headings, each dealing with an aspect where quality assurance is likely to require attention in a particular way when study is by distance learning:

- System design;
- Programme design, approval and review;
- The management of programme delivery;
- Student development and support;
- Student communication and representation;
- Student assessment.

Each section contains generic criteria and outline guidance. The criteria identify those key matters which an institution might reasonably be expected to be able to demonstrate that it is addressing effectively through its own relevant quality assurance mechanisms. The purpose of the accompanying outline guidance is to offer suggestions on quality assurance and control which institutions can use, elaborate, and adapt according to their own needs, traditions, cultures and decision-making processes.

At the end of the guidelines, in Appendix 1, are a series of self audit questions which have been included to provide further prompts to the detailed consideration of matters covered by the criteria and outline guidance, They are grouped by guideline and are formulated as a series of questions that an institution might wish to ask itself as it considers and reviews its current arrangements.

12.1 System design - the development of an integrated approach

1

Higher education by distance learning should be underpinned by principles relevant generally to higher education. An institution intending to offer distance learning programmes of study should design and manage its operations in a way that applies those principles and, at the same time, takes full account of considerations specific to teaching its students at a distance.

2

The provision of programmes of study by distance learning should form part of an explicit strategy for achieving an institution's stated aims, and the distance learning system or systems should be designed and developed in ways that will give effect to the strategy.

3

Prior to offering programmes of study by distance learning, an institution should explicitly design and test its system for administering and teaching students at a distance and plan for contingencies in order to meet its stated aims in terms of academic quality and standards.

4

An institution should safeguard its position in respect of the law in any country in which it is proposed that programmes of study should be made available by distance learning.

Outline guidance

An institution might be expected to:

- *establish and make publicly available a policy for assuring the quality and academic standards of the education that the institution provides at a distance;*
- *identify the processes and range of tasks involved in designing programmes of study, in designing and preparing learning materials and in delivering programmes to students studying at a distance, recognising that these processes and tasks are not the same in important respects as those applying in institution-centred teaching;*
- *determine the organisation and distribution of responsibilities appropriate to the system of distance learning;*
- *determine how to identify the characteristics and situation of students projected to study through the system of distance learning;*
- *identify which teaching media would be most suitable to a distance learning system, bearing in mind the educational aims of the programmes of study to be offered, the accessibility to prospective students of various teaching media and their relative costs to providers and students;*
- *determine whether there will be electronic (including telephone), postal and/or local support for distance learning students and, if so, in what forms;*
- *determine an appropriate structure through which to provide student support;*
- *identify, and wherever possible test, the forms and lines of communication to be used between all the parties to be involved, in the context of constraints imposed by the timetable and, where relevant, time zones;*
- *determine the processes that should apply to piloting, or otherwise field testing, learning materials, and to evaluating any locally provided facilities or services on which successful study is assumed to depend;*
- *determine the appropriate schedule for all activities forming part of the designed system and test the feasibility of timetables;*
- *devise processes appropriate to the system of distance learning, as designed, for feedback, review and evaluation of all components and specify how resulting information is to be incorporated into quality management and quality enhancement processes;*
- *incorporate projections on the updating and enhancement of learning materials and ensure that the design and operation of the distance learning system can take account of this updating and enhancement;*

- prepare contingency plans to provide timely and effective learner support consistent with the standards to which the institution is committed in the event of projections, such as those for students admitted, not being achieved;
- where it is proposed to extend the operation of a distance learning programme of study from one country to another, test the system on which it depends in the context of the new country prior to a programme being offered;
- where distance learning programmes of study may be made available, establish procedures for reviewing legal requirements concerning any approval for programmes to be offered in a particular country and also requirements under local law in respect of relevant matters including consumer protection, copyright, employment, packaging and postal despatch;
- establish a process for reviewing periodically whether the strategy of offering programmes of study by distance learning should be revised or discontinued;
- provide for a process under which, in the event of a programme of study being discontinued, due attention is given to meeting the institution's commitments to students registered on the programme;
- develop specific policies regarding the licensing of materials and other revenue sharing practices;
- develop specific intellectual property rights policies for materials used in distance learning programmes.

5

A providing institution's plans for offering programmes of study by distance learning should be financially underwritten for the full period during which students will be studying on them and at a level that safeguards the quality and standards to which the institution is committed.

Outline guidance

An institution might be expected to have developed:

- realistic projections on costs and income including those associated with the distance learning system, each specific programme of study offered and the projected numbers of students and their distribution;
- financial plans for programmes of study offered through distance learning which take account of realistic contingencies and are formally approved and underwritten by the providing institution at a level which ensures that any variation between planned and actual financial performance of the activity does not compromise academic standards and that the interests of students will be protected even where assumptions, such as those on the numbers of students registered, do not accord with what was projected;
- financial policies which make clear how expenditure and income associated with each activity in preparing and delivering programmes will be apportioned between all parties including between the providing institution, any local agent, tutor and students and how this apportionment varies in relation to student take-up;
- procedures providing for reviews of, and decisions on, performance against plans.

12.2: The establishment of academic standards and quality in programme design, approval and review procedures

6

The providing institution is responsible for ensuring that programmes to be offered at a distance are designed so that the academic standards of the awards will be demonstrably comparable with those of awards delivered by the institution in other ways and consistent with any relevant benchmark information.

7

In designing distance learning programmes of study, and any component modules, a providing institution should ensure explicit and reasoned coherence between, on the one hand, the aims and intended learning outcomes, and, on the other, the strategies for teaching at a distance, the scope of the learning materials and the modes and criteria of assessment.

Outline guidance

Institutional processes for designing programmes and any component modules might be expected to include:

- *a requirement that explicit attention be given to the academic standards appropriate to the programme and associated award, including a formal statement of how the programme conforms with any relevant and authoritative internal or external benchmarks;*
- *the identification of minimum academic prerequisites for the programme, and for each module, and the expression of these in ways that will be understandable in all parts of the world where the programme is to be offered;*
- *specification of the plans for updating learning materials so that these plans, and associated estimated costs, are taken into account in the initial design and preparation of learning materials;*
- *consideration of the strategy for formative and summative assessments including an indication of how summative assessments relate to the learning outcomes specified for the programme and/or module;*
- *a description of the relationship between the strategy for teaching and the stated aims and intended learning outcomes;*
- *provision for the implementation of quality control processes over core components of the programme as designed.*

8

A providing institution is responsible for ensuring that the design of distance learning programmes of study provides a learning opportunity which gives to students a fair and reasonable chance of achieving the academic standards required for successful completion.

Outline guidance

An institution might be expected to:

- *take account of the skills, knowledge and experience of targeted students and of the circumstances in which students are expected to study using the institution's distance learning system;*
 - *be explicit about the basis for selecting the teaching media chosen;*
 - *consider and specify in unambiguous detail the learning resources and the support that will be made available directly to students from the providing institution and any assumed or required to be in place at the location of the student, and any to be obtained by the student;*
 - *consider how learning materials might be structured to support achievement of the learning outcomes and to encourage the completion of programmes;*
 - *consider how learning materials might be made interactive and allow students to gain formative feedback;*
 - *specify in detail the schedule of student activities in following the programme of study using the planned system of distance learning;*
 - *identify the timetabling implications of any actions to be taken by the providing institution or any local agent or local tutor;*
- and in distance learning programmes offered overseas:
- *take account of the impact of local language, culture and educational traditions, and be specific about the language permitted for any local tuition and for assessment.*

9

A providing institution should have processes for approving distance learning programmes of study which, while underpinned by principles relevant to all educational programmes, take specific account of the requirements of the system of distance learning adopted and of the opportunities provided for scrutiny.

10

A providing institution's processes for the approval of programmes of study, and any component modules, should include an element of scrutiny external to the institution.

Outline guidance

- *An institution might be expected to have in place procedures which allow distance learning programmes of study, and any component modules, to be considered and, if appropriate,*

given a relevant level of approval at points in the process when choices can still be made between alternative courses of action. This may be expected to involve, depending on the system of distance learning in use:

- distinguishing outline approval of a programme of study and its intended design from final approval of a programme, or any component module, once learning materials have been prepared;
- finally approving a programme of study, and any component module, after taking account of the results of field testing and external peer review of the strategy for teaching, the quality of the learning materials and the modes and criteria of assessment;
- approving the arrangements for student support by, for example, local tutors and/or through intensive teaching, and approving also any facilities provided at a local centre.
- scrutiny by a person external to an institution might be expected to form part of the final approval of programmes of study and of component modules.

11

An institution should ensure that programmes of study and component modules once designed, and in use, are monitored, reviewed and subject to re-approval regularly; in particular an institution should ensure that the content of all learning materials remains current and relevant and that learning materials, teaching strategies and forms of assessment are enhanced in the light of findings from feedback.

Outline guidance

An institution might be expected to have:

- procedures for monitoring and review which are appropriate to its distance learning system and the programmes of study that are taught using it;
- the same general aims for the periodic review of programmes of study where it is offering a programme of study both by distance learning and on an institution-centred basis, but have specific objectives and processes for periodic review that are adapted to the mode of study;
- a procedure through which learning materials are verified as to their continued effectiveness, accessibility and currency, and action taken to effect necessary modifications and updating before a new intake of students begins work on a programme, or on a component module;
- a procedure for monitoring data on student progress and completion on programmes of study offered by distance learning, for reviewing any consequent implications for the programmes, and for taking appropriate action.

12.3: The assurance of quality and standards in the management of programme delivery

12

The providing institution is responsible for managing the delivery of each distance learning programme of study in a manner that safeguards the academic standards of the award.

13

The providing institution is responsible for ensuring that each distance learning programme of study is delivered in a manner that provides, in practice, a learning opportunity which gives students a fair and reasonable chance of achieving the academic standards required for successful completion.

Outline guidance

In exercising its responsibility of ensuring that distance learning programmes are delivered using the system designed for the purpose, an institution might be expected to:

- state the respective entitlements, responsibilities and accountability of the several parties in respect of the programme of study under the distance learning system, including, as appropriate, those of the student, any local agent, local tutor, travelling teacher and those associated with the programme in the providing institution, these to be contained in written, binding, agreements;

- specify the qualifications and experience required of any local administrative agent and academic tutor; formally approve and appoint any directly-employed local staff after operating a due recruitment process, and appraise staff performance regularly;
- plan and conduct briefing, training and staff development for those filling both administrative and academic roles associated with delivering the distance learning programme;
- operate a procedure for approving and reviewing any, and every, local support centre to be employed in delivering the programme;
- establish reliable systems for maintaining effective communication;
- make clear statements to each relevant party on the expected communication between the several parties in the distance learning system;
- establish, and make clear to each relevant party, the timetables along with the action required of each party in delivering the programme or module;
- provide for access by students to tutors on a sufficient, regular and known basis;
- ensure that all enquiries from students are handled promptly and sympathetically;
- ensure that student progress is monitored regularly and that students are provided with helpful comments on their progress in relation to the stated learning outcomes for their programme of study;
- detail what student and staff records are to be kept, by whom and in what form;
- establish and operate a system of quality controls which include regular monitoring and review against defined levels of performance of processes undertaken by local agents, local tutors, travelling teachers and those conducting teaching at a distance;
- specify the responsibilities of different parties in the distance learning system to take measures to protect students and any local staff in the event of communication failures or other emergencies;
- maintain full records on the action taken in delivering each programme.

14

Learning, although at a distance, should be treated as an activity involving all participants in the system, in which monitoring, review and feedback to those who manage the programmes of study are used regularly to enhance all components of teaching, learning and the system of delivery.

Outline guidance

The institution might want to:

- specify the procedures to be used for feedback, monitoring and review of the delivery of distance learning provision and determine the relationship between these procedures and its quality assurance system;
- include within its procedures provision for regular monitoring and appraisal of the programme of study as a whole and of each component in the system for delivering it;
- evaluate the effectiveness of teaching, learning and assessment strategies in the programme of study;
- record the findings from feedback, review and evaluation, and also the action taken on the findings, with the purpose of enhancing all aspects of the institution's provision.

12.4: Student development and support

15

In respect of students taught at a distance, a providing institution should give explicit attention to its responsibility for supporting and promoting autonomous learning and enabling learners to take personal control of their own development. An institution should set realistic aims, devise practical methods for achieving them, and monitor its practice.

Outline guidance

An institution should consider as a matter of policy how far its distance learning activities are intended to promote autonomous learning and to enable students studying at a distance to take further control of their own development.

An institution should give attention to, and make explicit statements about (including statements to students):

- its aims in promoting student development and autonomous learning, how far achieving these aims will be integral to the programme of study and what means it will use to promote the stated aims;
- the extent to which the institution will make available educational and personal guidance and the manner in which any such guidance will be provided;
- the extent to which vocational information and guidance is provided and how any such guidance will be made available;
- the processes by which it will evaluate the effectiveness of the action taken to secure its stated aims and how it will use feedback to enhance institutional performance.

12.5: Student communication and representation

16

A providing institution should meet the need of its students who are studying at a distance for information that is particularly full and clear about the nature and expectations of their programme of study; the relationship between achievement and assessment, academic progress and accumulation of credit; the characteristics of the distance learning system and how students interact with it. The information provided should be conveyed in a way that enables them to make informed decisions about their own education, and to monitor their progress against clear expectations of achievement.

17

A providing institution should monitor the effectiveness of information provided to students and, in the light of its findings, take steps to enhance its provision.

18

An institution should determine what means of student representation are appropriate and realistic for students on distance learning programmes of study and should provide these students with accurate information about them.

Outline guidance

The institution will need to consider what information is required by both prospective and registered students and how it can provide information with the necessary clarity. This is likely to include, at least:

- a statement of the responsibilities of the institution to the student, and of the entitlements and responsibilities of the student, in respect of the programme of study under the distance learning system;
- a clear statement about the nature of the award involved and the information which a successful candidate would expect to see recorded on the award certificate and/or the transcript;
- information on any professional recognition formally accorded to the award;
- information on programme admission requirements and the institution's admission criteria;
- information on the content and coverage of the programme of study and of any component modules;
- information on the intended outcomes of the programme of study;
- information on the characteristics of the distance learning system;
- information on the assessment methods and requirements and the procedures followed in determining results;
- the timetable for all activities including the deadlines for the submission of any assignments and the consequences of not meeting deadlines;
- information on the communications the student can expect from different parties in the institution;
- the fees and charges, when these will be required to be paid, how payment is to be made and how the institution will confirm receipt of payments;
- information about the time commitments required by the programme of study;
- information on the respective roles of academic and administrative staff, both local and remote, as they relate to students in following their programme of study;
- information on students' entitlement to support and guidance at their own location and any opportunity for direct contact with the providing institution and its staff;
- information on the learning support which students can expect on an individual basis, and on the basis of a local or networked group;

- information on the availability of networks and frameworks through which students can seek support at a distance;
 - information on the mechanisms for regular feedback to students on their performance, both formative and summative;
 - information on the arrangements made by the institution for access to learning resources and support services in local agencies or institutions, other than those made available directly by the providing institution, including through libraries and guidance and counselling services;
 - information on how the institution safeguards the reliability of assessment;
 - information on the procedures for dealing with detected instances of impersonation, plagiarism or fraud;
 - a statement of the institution's aims with regard to the promotion of student development and autonomous learning;
 - information on the formal status and rights of students within the institution including any which result from the provisions of student charters;
 - information on procedures to handle students' representation and feedback including provision of means to contribute to discussion of quality assurance policies and their operation;
 - information on appeals, complaints and grievance procedures including procedures for students to make representation directly to the providing institution;
 - information on the processes through which the institution secures feedback, and reviews, evaluates and acts on its findings;
- and in distance learning programmes offered overseas:
- information on the language of instruction and assessment;
 - information on the methods used to establish language proficiency;
 - information on any requirements or restrictions imposed by professional bodies or overseas governments in respect of the recognition of the awards;
 - information on the protocols governing the translation of any material forming part of assessment.

12.6: Student assessment

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A providing institution should be able to demonstrate publicly that summative assessment procedures used for programmes studied at a distance are appropriate for the mode of study, for the circumstances in which the programmes are studied and for the nature of the assessment being undertaken; that assessments are conducted and marked, and results promulgated, in a reliable and properly regulated manner; and that, in all respects, assessment procedures accord with the requirement to safeguard academic standards.

20

A providing institution should also be able to demonstrate that the summative assessment of a module, and/or a programme of study as a whole, adequately assesses students' achievement of the learning outcomes stated for the module and/or programme of study.

21

A providing institution should have direct control of the summative assessment process and the determination of results.

22

A providing institution should employ formative assessment as part of the design of distance learning programmes of study.

23

A providing institution should monitor systematically the soundness of its assessment procedures and practice and be ready to amend them in the light of feedback.

Outline guidance

In making arrangements for student assessment, matters which institutions should consider include:

- the educational rationale for the formative and summative assessment strategy for the programme of study and/or module;
 - the appropriateness of the level and promptness of feedback to students on their performance and progress through the assessment process;
 - its ability to demonstrate that it has appropriate processes for checking that students' work is their own;
 - the means for co-ordinating the marking standards of all involved in the marking of summative assignments;
 - the level of confidence in the security of its arrangements for any locally-administered and assessed summative course-work assignments;
 - the arrangements for monitoring marking standards applied to course work assessment;
 - where the institution does not itself directly administer and invigilate all examinations, the clarity and comprehensiveness of the rules, instructions, registers and other documentation applying to each phase of examinations, and the extent to which these will be understandable by persons unfamiliar with the required examining practices;
 - the reporting requirements to apply to all assessment events conducted on behalf of the institution;
 - the monitoring of examinations administered on behalf of the institution;
 - the availability and practicality of using oral or viva voce examinations for determining borderline cases of degree classification when students are at a distance;
 - the effects of time zones, and the opportunity for the ready transfer of information about examinations, when administering time-controlled assessments in widely differing locations;
- where a distance learning programme is a variant of an institution-centred programme:
- the appropriateness to distance learning of the assessment mechanisms used for institution-centred provision;
 - the access of external examiners to the assessed course-work and examination scripts of students learning at a distance;

It is hereby fully acknowledged that these guidelines are drawn primarily from the "Guidelines on Distance Learning" produced in March 1999 by the Quality Assurance Agency for Higher Education in the UK. In addition, acknowledgement is given to the 1999 Quality Standards for Distance Learning MBA Programs of the Foundation for International Business Administration Accreditation (FIBAA) and the Distance Education Guidelines produced in 1999 by AACSB - the International Association for Management Education.

Appendix 1

Exemplifying questions

These questions are offered as examples of the types of questions which institutions might wish to ask themselves as they consider and review their current arrangements. They are grouped by guideline and relate to both the precepts and outline guidance contained under each guideline.

Guideline 12.1: System design - the development of an integrated approach

- Does our institutional policy on teaching and learning have recognisable implications for the design of the system, or systems, we are using for distance learning?
- How should the system of distance learning we use reflect our institution's policy on teaching and learning?
- What teaching and learning strategy guides our distance learning provision and does this strategy relate to the teaching and learning strategy for any institution-centred provision?
- What is our educational and pedagogical rationale for introducing a distance learning mode of study?
- What are the educational practices which underpin our distance learning system? How soundly grounded are these educational practices?
- What evidence is there that the teaching media we have identified for use suit the needs of our target students?

- Do our selected teaching media offer students sufficient variety to suit different learning styles?
- Are we already teaching the same programme of study using a different mode of delivery, and, if so, how will policy for assuring quality and standards need to be changed?
- What modifications do we need to make to our established policies and administrative processes in order to accommodate distance learning programmes of study and distant students ?
- Should we design one system, with optional variations, for teaching students at a distance on all programmes of study or should we design multiple systems, each one for a specific programme of study?
- Have we asked ourselves whether a unique system should be permitted for each separate programme of study?
- Does our distance learning system take full account of the expected or intended balance between dependence on self-study learning materials and the use of scheduled teaching as part of the programme?
- Is there a clear, up-to-date description of our distance learning system and of the role in it of all participants?
- Do we intend to evaluate the overall system of distance learning separately from the review of individual programmes of study?
- Do we need to use local administrative agents? If so, what specific purposes are they to serve? If a local agent is necessary, what form is most appropriate to our requirements, the needs of our projected students, and the environment in which we shall be offering the programme of study?
- If our system includes a local agent, which office or office-holder within our institution is to have direct responsibility for the management of relations with the agent?
- In the projections on costs and income, have we made realistic estimates of the amount of staff time needed to support the delivery of a programme?
- Have we made realistic estimates of staff time needed to keep learning materials current and to enhance programmes of study in the light of feedback?
- Have our financial plans fully taken into account the direct and indirect costs of technical support staff, the production and distribution of learning resources, and all costs realistically associated with implementing any hardware and software required to administer a distance learning programme?
- Where computer-based learning or other electronic technologies are employed, have we made adequate provision for the costs of training teaching staff in the proper use of the technology?
- Who is responsible for reviewing and evaluating financial performance against initial financial plans under the system for distance learning? When is this review to be undertaken and what alternative options can be considered and decisions reached in the light of the review?

Guideline 12.2: The establishment of academic standards and quality in programme design, approval and review procedures

- Has the programme of study academic and intellectual currency and will it require the attainment of standards appropriate to the level and nature of the award?
- Will the scope of the learning materials be sufficient for our students to achieve the learning outcomes that we have specified?
- What contribution to the programme of study is to be made by specially prepared self-study learning materials, already available learning resources (including on the Internet), locally accessible resources (e.g. local library), local face-to-face teaching from travelling teachers and/or local tutors, teaching by correspondence or electronically mediated, student group activities?
- What training and staff development should we be providing on the preparation and enhancement of distance learning materials?
- In designing programmes of study what attention are we giving explicitly to reviewing what has been identified previously as good practice?
- What part of the teaching will be directed to students individually and what part to students as a group?

- *What learning objectives/outcomes can be advanced best by any residential or non-residential group study schools?*
- *Are we exploiting the flexibility associated with distance learning in order to enhance learning opportunities?*
- *What use can we plan to make of problem-based learning related to students' own employment?*
- *What support materials will we be providing to those involved away from our own institution in organising and conducting teaching, student group activities and on the conduct of formative and summative assessment?*
- *In preparing material to support any local tutors, how will we ensure that the material takes into account the context in which particular students will be studying?*
- *Are there any legal restrictions either on the use of certain materials or on their transmission using the chosen means of communication (for example, can video cassettes be dispatched to a particular country without prior clearance)?*
- *Do we have a secure process for ensuring that copyright requirements are met?*
- *If part, or all, of the planned teaching is to be delivered in concentrated periods, how can we organise this so as not to put at risk any equivalence between a programme of study delivered by both distance learning and at the provider's location?*
- *In programmes of study using computer-based learning or other electronic technologies have we ensured that there is an explicit policy for dealing with changes and upgrading of hardware and software?*
- *What is the profile of our prospective students and what features of their situation need we take into account in planning and preparing the programme of study and component modules?*
- *Where an existing programme of study, offered within the institution, is to be delivered through distance learning, are we taking full account of differences in the skills, knowledge, experience, situation and culture of the projected distance learners from those studying the programme within the institution while, at the same time, maintaining equivalence of academic standards between the two programmes of study?*
- *Are we stating the learning objectives and outcomes in a way that will be clear to students and will students recognise the way learning is structured to facilitate the achievement of outcomes?*
- *In overseas provision, what language is to be used in the programme of study, and what proficiency will projected students need to have in the language?*
- *In what ways does the content of programmes of study and component modules recognise the opportunities and constraints of the environment in which the programmes and modules may be studied and the situations and expectations of prospective students?*
- *How do we encourage students to be active learners?*
- *How are we pacing and structuring students' learning?*
- *Are we introducing frequent opportunities for students to use self-assessment and to obtain formative feedback so allowing them to monitor their own progress?*
- *Where students are projected to be individual, isolated learners, are we making information, instructions and guidance sufficiently full, explicit and clear?*
- *Do we provide students with clear information on what learning materials they are responsible for obtaining for themselves? Do students receive this information in time for them to act on it and still work according to the planned timetable for their studies? Do we tell students the probable cost of obtaining materials for which they are responsible?*
- *Where they will be required to use computers or other electronic technology, what support will we make available to students to familiarise themselves with required technology at the start of the programme of study?*
- *In the situations in which students may study, what local technical support can we assume will be available to those students who experience difficulties in setting up or maintaining essential equipment? Have our assumptions been tested?*
- *Have we assessed the relative costs of technologies? Have we made assessments of what equipment it will be realistic for students to be required to buy?*
- *Have we assessed the estimated lifetime of any technology we propose that students should use and have we determined whether its cost and life span presents good value to students and our own institution?*
- *Where we are planning to use computer-based learning, or other electronic technologies, will the technologies be sufficiently understood by any local agents or tutors and by our*

students, even when the technologies are not intrinsically relevant to the subject being studied?

– Are we assessing the student work-load involved in studying the programme or module against realistic norms?

– Where programmes are to operate outside the provider's country using computer-based learning, have we taken steps to ensure that equipment specifications and standards are compatible?

– Where computer-based learning is to be used, are we arranging for local agents to make essential equipment available to students or are we expecting students to acquire their own equipment?

– Are we arranging the learning materials so that they are directed to the stated learning objectives?

– Have we consciously adapted the processes of design and approval, as applied to programmes of study using other forms of delivery, to take into account the particular needs, opportunities and constraints associated with the distance learning programme of study, and of any constituent modules, without compromising quality control?

– What criteria are we using to assess the suitability of the teaching strategy, the content, structure and production standard of learning materials, the media of communication employed and other learning support to meet module and programme objectives?

– What arrangements do we have to review and approve the quality of learning resources, and against what criteria, eg academic currency, pedagogic effectiveness, relationship to stated learning outcomes, reflection of house style, legibility, production standards, etc?

– What arrangements are we making for field-testing learning resources with students?

– Does the timetable for considering and approving programmes of study, and individual modules, allow realistically for significant changes to be made or for the contingency of abandoning a programme of study or component module?

– Have we adapted the processes of review, as applied to programmes of study using other modes, to take into account the particular needs, opportunities and constraints associated with the distance learning programme of study, without compromising quality control?

– Can we claim fairly both that the same aims apply to the periodic review of distance learning programmes of review and to programmes taught using different modes, and also that specific objectives have been appropriately stated for reviewing distance learning programmes of study?

– Do we have a process for reviewing regularly and systematically whether the content of learning materials, forming an integral part of our distance learning programmes of study, remains current? How do we act on the results of the review? Do we make provision for the staffing, production, briefing and training and other costs associated with revising material and keeping it current?

– Have we arranged for the internal validation of the academic content of any Web-based resources, which are integral to the syllabus but where ownership resides beyond the providing institution? Are procedures in place to verify that Web sites, to which access is required by students, have not been withdrawn and that they continue to comprise current and relevant material? Can we be sure that no change will be made in access charges to externally-authored Web sites during the period of their required use?

– Do we have a timetable for reviewing feedback, and also data on student progress and completion, and for acting on its findings in a way that enhances the design of programmes of study and any component modules?

– Does information coming from students confirm, or undermine, our claim that the design of the distance learning programme of study results in a learning opportunity which gives to students a fair and reasonable chance of achieving the academic standards for successful completion?

Guideline12.3: The assurance of quality and standards in the management of programme delivery

– Do we have a named programme manager and what other named parties are there in our distance learning system?

– Where do we define and state the responsibilities of different parties for, for example, publicity; selection, admission and registration of students; collection of fees; recruitment of any local teachers; the despatch of learning materials; record keeping; other administrative

communication; providing information to students on their progress; informing any local tutors about their performance?

– What is the planned division of responsibility between any local agent, local tutor, travelling teacher or distance teacher?

– What are the stated criteria for use in the selection of any local agent?

– What experience and expertise do we require of any local tutor, for example, subject knowledge, knowledge of local culture, higher education teaching experience, experience of similar academic programmes and of delivery at a distance?

– How do we make sure that local tutors and travelling teachers are proficient in the language used in the learning materials and in assessments and, if this is permitted to be different, in the language of tuition?

– What arrangements have we made for involvement - and by whom in the institution - in the appointment of any local agent and in the selection and appointment of local tutors on the programme?

– As well as expertise in their academic subjects, do any travelling teachers have suitable expertise in the modes of working required of students by the designed system of distance education?

– What initial briefing and training, and to whom, are we arranging to be given on the system of distance learning and individual roles and responsibilities in it ?

– What initial staff development shall we be giving to local agents and tutors on the aims and design of the programme of study, the characteristics of students studying at a distance and the management and delivery of the programme?

– What initial briefing do we give to our staff on the time-management implications for students resulting from computer-based distance learning?

– Where computer-based learning is employed, what briefing and training are we providing for teachers regarding the teaching schedule, contributions to tutorial-style discussion (eg computer conferencing) and moderation and supervision of electronically-mediated discussion groups?

– What, if any, variations to our admission requirements for institution-centred provision are we permitting to attest to a student's ability to cope with the demands of the distance learning programme of study?

– How are we to compare the profile of students assumed in the design of the programme with that of the students actually admitted? What provision are we making for modifying the content and design of the programme of study to take account of any differences?

– Can our timetable for action realistically allow students to work according to the study plan for the module and programme of study?

– Have we identified and stated standards of performance for specified tasks? Have we determined the period within which action is to be taken in responding to student queries and in returning student assignments? How are we monitoring performance against these standards?

– Who is responsible for monitoring the quality of comments to students on their progress?

– Where postal communication is to be used, does the timetable take fully into account the vagaries of the postal distribution system? Have we tested these assumptions?

– What steps are being taken, and by whom, to encourage students to form face-to-face self-help groups or student remote networks?

– Who will be responsible for moderating any programme-based computer conferencing?

Who will be responsible for monitoring computer conferencing against a code of conduct for participants?

– Who is to provide local administrative support for travelling teachers, eg in booking venues and facilities and accommodation for teachers and for students, arranging for local publicity and for distributing information to enquirers?

– How do we check the suitability of local teaching venues and facilities in advance of a visit by travelling teachers?

– Where we have arranged for management of programmes of study to be shared between different staff within the providing institution, and between the institution and any local agent and local tutor, how do we specify the respective responsibilities of the different parties for the quality of programme management?

– How are we arranging for continuing staff development for any local agents or tutors?

- In overseas provision what continuing staff development are we giving to travelling teachers to enhance their teaching effectiveness in unfamiliar environments and where students may be studying in other than their first language?
- Where a programme of study is organised around sessions conducted by travelling teachers, what access will students have to the teachers between sessions?
- How do we provide for the effectiveness of continuing teaching, including that using electronic technologies, to be monitored?
- What record do we require to be kept of telephone, email and other communications with local agents, tutors and students?
- Where the use of web-based resources is either recommended or required, what are we doing to accommodate students who find themselves unable to access the Internet?
- From whom, in what form and how frequently do our students learn of their performance and progress?
- How are we conveying to the different parties involved a sense that learning involves a partnership and how do we plan to achieve a co-ordinated approach when there may be unfamiliar divisions of responsibilities and different degrees of physical separation?
- What reports do we require of travelling teachers after each set of study sessions?
- How do we identify unsatisfactory teaching?
- How rapidly do we identify unsatisfactory teaching and how rapidly do we remedy this?
- Have we set down clearly and explicitly, and made procedures known to all relevant parties, how difficulties requiring urgent attention in the distance learning system are to be reported?
- Are we making remote sites aware of the procedures to follow in reporting technical failures? Are we putting 'quick response' mechanisms and structures in place so that urgent matters are addressed speedily?
- Have we arranged for fail-safe measures involving alternative emergency methods of communication to be put in place in the event of a failure of the primary channel of communication eg mail, electronic or IT based?
- How have we assigned responsibilities for evaluating the quality of the programme, the effectiveness of the teaching, the nature of the students' experience and how effectively the programme of study has been managed?
- Where and how are students informed about the processes of programme and module monitoring and review and have we explained to them how these relate to the institution's overall processes of quality assurance?
- Does feedback allow us to identify factors relating to student progression and non-completion?
- What arrangements do we have to allow us to give constructive feedback to any local agent and local tutor on their performance in the management and delivery of the programme of study?
- Can we be sure that feedback on the effectiveness of current provision results in enhancements to the delivery of programmes of study at a distance? Is the feedback we get evaluated? Do we identify and record good practice and do we keep a record of consequential action?
- What conclusions can we draw from feedback on the delivery of the programme of study about our commitment to provide a learning opportunity which gives students a fair and reasonable chance of achieving the academic standards for successful completion? What action are we taking on these conclusions?

Guideline 12.4: Student development and support

- What, if any, orientation, support, advice or assistance do we provide to students initially in order to prepare them for self-direction in their studies and for the management of their learning?
- What support do we give to students as part of their orientation in order to help them to become competent in the use of equipment and technology integral to their study?
- Do we notify students of a named person to contact where they have general questions concerning their programme of study or questions on problems of studying at a distance in higher education? Do we tell students what forms of communication they should use - for example, by phone at specified times, by correspondence, by email, by fax? Do we inform students of the institution's quality standards in acknowledging and responding to enquiries?

- *What help, counselling or advisory services do we make available to students for them to consult at their discretion?*
- *How do we respond to students who indicate that they are having difficulties with their studies?*
- *What, if any, facilities and support services, beyond those forming an integral part of a student's particular programme of study, are we providing to create a learning environment?*
- *What responsibility, if any, do we assign to a local agent to create a general learning environment accessible locally to students studying on a distance learning programme of study?*
- *How do we handle students' applications for deferments of their programmes - within the limits of what the regulations allow - and how do we evaluate applications that involve checking the validity of circumstances that make applications for special treatment permissible?*
- *Should our students on distance learning programmes of study have access to vocational guidance on the same basis as students on campus? If so, how should we ensure this?*
- *If vocational guidance is not made available to students studying at a distance, has this been made explicit in initial information for applicants and students?*
- *Should we be providing students on distance learning programmes of study with information about publicly available careers information and guidance and, if so, how should we do this?*
- *What means do we have for gaining feedback on the effectiveness of action taken to achieve the institution's aims in encouraging student development and providing support? What commitments do we make for acting on feedback?*

Guideline 12.5: Student communication and representation

- *Do we provide students with information about the institution and its organisation in a form that is comprehensible to them and allows them to understand the institutional context for their responsibilities and entitlement? How do we know that this information is understood?*
- *Do we make clear to students prior to registration any requirement to attend residential seminars or schools? Does that information include the timing and costs of any such residential seminars?*
- *In publicity for the programme of study, do we include a clear statement of the required skills in dealing with communication technology?*
- *Do we make prospective students fully aware of any requirements to use Web-based resources? Are students given an indication of estimated costs?*
- *Have we stated clearly the technical requirements for the proper operation of courseware and the action to be taken by the student in the event of equipment failure?*
- *How do we make students fully aware of the existence and functioning of learner support procedures to assist with electronic communication?*
- *What guidance do we give to students on the different ways in which they may use the learning materials?*
- *What checks do we require to be made, and by whom, of any written information and guidance prepared by local tutors where these form part of the system?*
- *How do we organise student representation? Where there are also campus-based students, how do we arrange the representation of students at a distance in relation to that for campus students?*
- *Where the distance learning system includes use of travelling teachers, do these teachers have a stated responsibility for obtaining or monitoring student opinion?*

Guideline 12.6: Student assessment

- *Do the forms of summative assessment that we use test effectively whether students have achieved the expected learning outcomes of the programme of study?*
- *Have we reviewed and revised the rules, instructions and documentation applying to the assessment of summative course-work and the conduct of examinations, to take account of different expectations and a different educational culture in the place where the programme of study is to be offered and where it is to be assessed?*
- *How will we verify students' claims for additional time in submitting course work, or for special circumstances to be taken into consideration in assessing course work or examination performance?*

- *What briefing and training are we giving to any local agent and local tutor and to students on the rules, procedures, conventions and practices relating to the summative assessment of course-work and to examinations?*
- *What is the relationship between formative assessment and summative assessment? Will the formative assessment allow students to monitor their progress?*
- *How have we specified the distribution of responsibilities between travelling teachers and any local tutors for marking formative and summative course-work?*
- *What responsibility do travelling teachers have during visits for assessing students' course-work assignments, supervising assessment events, monitoring and moderating marking by any local tutors, conducting oral examinations and hearing student grievances and appeals?*
- *Where students' course-work is marked by local tutors, what arrangements have we made to co-ordinate marking standards?*
- *What arrangements have we made for monitoring and moderating the marking of any local tutors?*
- *What proportion of summative assessment should we be conducting under controlled conditions to safeguard the security of judgements about the quality of students' performance?*
- *What procedures for verification do we rely on where students are mainly or wholly assessed by project and/or course work?*
- *What guidance do we provide to students, and at what point in their studies, on the form of unseen examinations?*
- *Are we subjecting to prior inspection the places in which examinations are proposed to be held? Does approval depend on an inspection?*
- *Do we require those responsible for invigilating examinations to submit a formal invigilator's report following every examination?*
- *Where local examination script markers are used, what procedures have we instituted for their approval, briefing and training, and for monitoring, moderating and standardising marking?*

(It is hereby fully acknowledged that these questions are drawn primarily from the "Guidelines on Distance Learning" produced in March 1999 by the Quality Assurance Agency for Higher Education in the UK. In addition, acknowledgement is given to the 1999 Quality Standards for Distance Learning MBA Programs of the Foundation for International Business Administration Accreditation (FIBAA) and the Distance Education Guidelines produced in 1999 by AACSB - the International Association for Management Education.

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