

# Supporting Learners in a Digital Age (SLiDA)

## Methodology Report

January 2010

### 1. Overview

This is a report of the methodology used to create the case studies which formed the main deliverable from the JISC funded Supporting Learners in a Digital Age (SLiDA) project. Further details about the SLiDA project, including the aims, research questions and main findings can be found in the SLiDA Synthesis Report. The case studies themselves are available at <https://wiki.brookes.ac.uk/display/slidadcases>.

This Methodology Report is intended as an accompaniment to the Final Report for readers who want further information on how the data were collected. It is also likely to be of interest to other projects that are considering case studies as a method for investigating and sharing current practice.

In brief, the SLiDA project ran for eight months (March – October 2010), with the aim of critically examining the strategies, policies and practical developments being implemented by UK higher and further education institutions to support learning in technology rich environments. The intention was to use the creation of case studies as an opportunity to engage institutions with these issues. The project would both result in a collection of 10 case studies recording the innovations at each host institution, and encourage staff in these institutions to look creatively for sources of evidence of learner needs and where necessary, to investigate the impact of their work. For us, the creation of the case studies was conceived of as an active, developmental process.

### 2. Recruiting and selecting case study sites

#### 2.1 Background and rationale for our case study approach

This project followed on from a programme of research to elicit and capture learners' experiences of e-learning (see <http://www.jisc.ac.uk/learnerexperience>). We were interested to explore the impact of these projects in further and higher education institutions. Putting to one side the detailed findings from the Learner Experiences of E-learning (LEX) studies, they demonstrated the value of listening to learner voices, of engaging learners in decision-making and a need to do more to prepare students for learning in a digital age, including the development of digital literacies.

While institutions have placed 'the student experience' on their strategic agendas, the task of translating learner experiences research findings into teaching and learning practices is just beginning. We know from the LEX studies that the experiences of learners are difficult to elicit, and that they are diverse and complex<sup>1</sup>. The Learning Literacies in a Digital Age (LLiDA) project describes how it can be challenging to integrate university services to support learner development at the institutional level<sup>2</sup>. There is clearly much work to be done to understand how individuals learn in the digital age and how this understanding can be best applied at different levels in the education system from the individual practitioner, department, faculty, service and institution.

The intention of the SLiDA project was to identify institutions that were taking this agenda forward in an institution-wide approach and explore how they were doing

this. While we were confident that the case study outputs themselves will be of value to the wider community at the end of the project, the focus on case studies was primarily a way in to the selected institutions. It legitimised the conversations we wanted to have with them about how they were investigating, monitoring and responding to students' needs. We did not attempt to record in detail the full range of institutional practices and policies to support learning in technology-rich environments. Rather, we tried to establish the institutional 'landscape' and context in our early interactions with the case study sites and then focused in more detail on a relatively small number of institutional-level activities that directly addressed our research questions.

It was clear from the start of the project that the selected institutions needed to share our understanding of the rationale and process for the creation of the case studies. In our documentation and conversations we tried to make it explicit that we were interested in their local evaluations, their use of existing research evidence, that we expected openness in their engagement with the project and that we would be asking tough questions and challenging their answers.

## **2.2 Selecting the case studies**

In the project bid we noted that we thought we were 'well networked within the community' and at this stage we had provided a list of 10 possible case study sites to discuss with the JISC. The JISC encouraged us to issue an open call for engagement in the project which was distributed widely through the JISC mailing lists and Regional Support Centres. We very quickly received an additional 20 expressions of interest for involvement in the project.

Although the open call drew our attention to other institutions that we were not aware of and raised the profile of the project, we did not have the capacity to follow up in any detail all of the expressions of interest. Future projects may wish to devote more time to this initial stage of the project. Fortunately for us, there was a JISC initiative running in parallel, creating a group to pilot materials around the development of digital literacies<sup>3</sup>, and we were able to direct those who had responded to our call to that group.

In deciding which of the 30 available sites to work with, we developed the following selection criteria. We were looking for institutions that:

1. had already begun to evaluate the impact of their initiatives;
2. were taking seriously their responsibility to develop learners' academic, digital and learning literacies;
3. were interested in examining the evidence they had available for making decisions about learner development;
4. would be willing to share their innovations (both progress and challenges) with the sector.

We selected 10 case study sites to work with: seven higher education, two further education and one specialist college. Of these, nine continued to the end of the project and their case studies have been published. One withdrew shortly before the visit stage, citing lack of time to contribute to project and specifically, a clash with the proposed timing of the visit at busy periods at the start and end of term.

## **2.3 The welcome pack**

As this was a short project and we had specific aims for the case study methodology as explained previously, we produced a welcome pack for the selected institutions. This included:

- A welcome letter which outlined the expected time allocation needed to engage with the project (Appendix 1)

- A copy of the welcome letter to be signed by a manager and returned, confirming their engagement with the project.
- Participant Information Sheet for the project (Appendix 2)
- Confirmation of the ethical approval obtained for the project and example consent forms that they would be asked to fill out at later stages (Appendix 3).
- Introduction to a named consultant who would be working with them throughout the project.

There was some feedback from case studies sites about the 'heavy handed' legal tone of the introductory letter, particularly around intellectual property. This letter had been produced in collaboration with the Legal Services department of the lead institution (Oxford Brookes University). The letter had to be signed by someone with the authority to sign on behalf of the university – necessary for legal documents but not to express support of a small project such as this. Many of the case study sites passed the letter to their legal support services for checking, which meant that a signed copy was not returned for many months. In some cases, we were still chasing these after the case study had been written.

The welcome letter then did not fulfil its intended function of confirming institutional support at the start of the project. Although we had originally intended not to proceed with data collection until signed letters were received, because we were aware of the delays in the return of the letter, we did not wait for their return before proceeding. There were some losses then in time and costs devoted to the case study which did not complete. Future projects might want to be aware of the time needed to allow for the necessary legal work to be completed. In our case, with hindsight, we could have split the institutional commitment (which largely concerned the visit) and intellectual property notices (which largely concerned the writing of the case study) into two separate agreements.

The welcome packs were sent out in two stages. A group of five case study sites who were ready to proceed received their packs first, with the second group being sent out a month later. This staggered start turned out to be useful. It allowed the case study sites to proceed at a pace which suited them, with some needing a little longer to consider the focus for their case studies. It also gave us the opportunity to reflect on and learn from the earlier case study interactions and feed this into the later case study visits.

### **3. Data collection**

#### ***3.1 The case study template***

The data collection centred on the information needed to complete a case study template. In devising our template we drew on examples from the JISC Effective Practice with e-Learning Guide<sup>4</sup> and the snapshot proforma from the LLiDA project<sup>5</sup>. The template underwent multiple revisions and improvements during the project as we developed our understanding of how the case study sites would be able to contribute to the SLiDA research questions.

An early version of the case study template is included in Appendix 4. This maps the questions onto the data collection opportunities to be used to help complete each section. Feedback from the case study sites indicated that the terminology here was too focussed on 'projects'. The initiatives taking place at some institutions had been facilitated by projects – but others had not. In brief the case study template prompted questions related to:

- the rationale for developments
- background, especially institutional context

- technology being used
- implementation process and progress to date
- benefits for learners
- evaluation of the project effectiveness for learner experience
- challenges and drawbacks
- future plans for development
- summary and recommendations.

The draft case study template shows that while several of the broad topic headings listed could be covered in just one interaction with a participant, most would be returned to several times over the course of three or four interactions with each participant. The idea was that over the course of these multiple interactions we would build up a more detailed picture under each topic.

### **3.2 A cycle of interactions**

A cycle of multiple interactions was planned to take place between the case study site and members of the project team. It was noted that this was useful to keep the case study representatives focussed on the questions relevant to the SLiDA project. The planned interactions are listed and then discussed below:

- A phone call to build a background picture of work at the institution.
- An online workshop to share project aims and consider evaluation tools and forms of evidence.
- A site visit to collect and record experiences from others involved in the institutional developments.
- Document sharing to produce a case study outlining what has been done at the institution, how it is being evaluated and any findings and recommendations.

Around these key events, the consultants kept an ongoing conversation with each of their case study sites.

#### **3.2.1. First phone call**

Each case study site was linked with a named consultant from the project team. After the welcome pack had been sent out, the consultant made contact with the case study site participants, clarifying who were the appropriate people to talk to and arranging a first phone call. A set of questions were prepared in advance for each phone call (see Appendix 5), which was used to build a background picture of work at the institution. This was also the first key stage in a process of building a trusting, open relationship between the case study participants and their consultant.

#### **3.2.2. Online workshops**

After the initial phone call, two online workshops were held (in Elluminate) - one for each of the two groups of case study sites. The purpose of the workshops was to explain the overall aims of the project and create a sense of belonging and commitment to the SLiDA project and its aims. The programme for one of the workshops is shown in Figure 1.

After a brief introduction from the project lead, the first activity demonstrated to the case study sites the aspects of their work that we were interested in. Each case study site spoke for five minutes around a slide they had submitted in advance, and then the project team members generated follow up questions from the presentations. These were used to indicate the kinds of questions we would be interested in following up through the subsequent ongoing conversations and visits e.g. our interest in evaluation as well as implementation.

1.15 - 1.35	Preliminary Elluminate Orientation Activity	GB
1.40 - 1.50	Introduction to the SLiDA project	RS
	Participants introduce themselves	All
1.50 - 2.20	Participants – present a slide to introduce their project (5 minutes each)	JH
	University of Wolverhampton	ML
	Thornbeck College	BM
	London Met	CF
	Oxford Brookes	RF
	Birkenhead College	CH
2.20-2.30	Summarising similarities & differences in projects	JH
2.35- 3.00	Break	
3.00 -3.45	Project evaluation group activity	All
3.45 - 4.00	Questions & next steps	RS, GB & JH

Figure 1: Example programme from one of the online workshops

As an example, the question list from one of the workshops was:

- How has your work been influenced by student feedback and/or student needs?
- How do you know that student voices have made a difference?
- What methods are you using to hear student voices directly? (not mediated/outdated/assumptions?)
- What staff CPD is helping staff to develop their digital literacies?
- How successful has the innovation been? How do you know?
- Did any frameworks underpin your planning to develop students' digital literacies?
- How do we combine strategy with embedding?

The second activity was designed to engage case study participants with the nine SLiDA research questions. Participants were asked to start to map themselves against the research questions. The intention was that they would start to see how each case study would contribute to the whole, for example why we might not be asking them one particular aspect of their work, but not about others.

### 3.2.3. Document sharing

Case study participants were invited to share documentation to support their claims at every stage in the data collection process. Documents were selected from these as 'assets' to augment the final web-based representation of the case studies (see Section 4.3). In order to encourage an open conversation between participants and project team members, participants were able to give consent for documents to be used in different ways (see Section 3.3).

### 3.2.4. Site visit

The visit was the culmination of an ongoing conversation over the previous three to four months. The purpose of the site visit was to conduct interviews with key individuals. The prior conversations allowed us to select appropriate people from across the university. The advance notice given for the visits helped gain access to senior managers. We also tried to see students at all visits, although this was not always possible, and as always, time of year was crucial. Where we were able to see

students we found it useful to talk to them first, as their perspectives helped in forming questions for staff.

Consultants prepared a detailed schedule for the visit (see Appendix 6 for an example) and shared this with the case study site in advance, showing how each interview would help to tell their particular story, mapped against the SLiDA research questions. This was a crucial stage to clarify the intentions of the data collection.

Interviews were both audio and video recorded. The audio was used to create full transcripts of each interview, using a professional transcription service.

The intention was that project team members would go in pairs to the visits. We have found in previous projects that a pair of interviewers promotes deeper, more focussed questioning. In a tight schedule it can also allow for interviews to run in parallel. In three of the nine visits, this was not possible due to diary commitments, illness and weather. It is worth noting though that these visits would likely have been cancelled if only a single project member had been booked initially. Pairs offered us some protection in a short project. When working in pairs, we found that we needed to make time to discuss each case study prior to the visit in order to clarify, agree and articulate the story for each institution. This preparation helped to keep the conversations during the visits focused.

Overall the key features of the visits were the need to get as much from a single day as possible by meeting the right people who were well prepared for our visit. Second, was the need for clarity and shared understanding of the story to be told. Sometimes participants and interviewees wanted to tell one story of what was happening at their institution, when we were interested in another. Preparation was crucial, as was the timing of the visits towards the end of our data collection process.

### **3.3 Ethical considerations**

Ethical approval for the project was obtained from the Oxford Brookes University Research Ethics Committee (UREC). In order to obtain approval and in line with established ethical good practice we asked each case study site to return signed copies of the welcome letter and to confirm that sole approval by UREC was sufficient for their institution to contribute (as we would be meeting some of their staff and students). No incentives were offered other than the opportunity to have publicized their institutional practices and policies for learner support in technology-rich learning environments.

Consent was obtained from each interviewee for participation in the study and for their interview to be audio and video recorded (see Appendix 3). We also asked interviewees to sign the JISC Image Consent Form<sup>6</sup>. We asked each individual to give their permission (which could be withdrawn at any time) for quotes from the transcripts and/or extracts from the videos to be used in the final case studies. Prior to publication of the case studies, we checked back the quotes and extracts we had selected with their originator. Everyone who appears in the final case studies has agreed for their identity to be associated with their quote(s) and/or video extracts.

Each time case study participants provided a document, they specified how it could be used (see Appendix 2) from these four options:

- a. For SLiDA project team eyes only; do not divulge content or sources
- b. Content may be reported but the institution and/or the individuals associated with it should be de-identified in publications
- c. A public document that may be cited and quoted and sources identified
- d. Specific treatment as specified below:

It is worth noting that in some cases this form was not filled in correctly, with the document title and author not being completed and the form may need some minor redesign prior to reuse.

## **4. Co-creating the case studies**

### **4.1 Telling the story**

We deliberately used the terminology 'co-creation' to describe how we envisioned the final representation of each case study would be produced. We had a very specific story to tell about each case study and we used succinct titles, sentences and straplines to help us stay focussed. At the final stage of creating the outputs we used a framework of plain English questions to tell the story from each institution:

- Institution
- Strapline, phrased as a question (e.g. How is Salford University embedding digital literacies into the curriculum?)
- What's the story?
- What has happened?
- What has been the student experience of these initiatives?
- What has been achieved?
- What advice would you give to others?

Even at this late stage, one or two of the case study sites asked to make substantial changes to the text which had been drafted. Such co-creation is complex and requires careful negotiation. It was a feature of this project that we were mining the institutions for information to help us answer our questions, rather than listening passively to the story they wanted to showcase. At times this tension could be challenging, frustrating, productive and all of these things.

### **4.2 Dissemination events**

In order to support the co-creation of the case studies, colleagues from case study sites were invited to participate in project dissemination events from the start of the project. This helped in coming to a shared understanding of their story and became part of the data collection. The dissemination events were:

- 24 June 2010, ELESIG online seminar on supporting learners in a digital age, with contributions from Birkenhead Sixth Form College.
- 13 July 2010, JISC Learning and Teaching Experts Group, with contributions from Edinburgh University and Surrey University.
- 6-9 September 2010, symposium at the Association for Learning Technology conference and pre-conference workshop with contributions from Salford University and Glamorgan University.
- 6 October 2010, ELESIG event in London with contributions from Surrey University, Oxford Brookes University and Wolverhampton University (see the ELESIG site for videos from this event<sup>7</sup>).
- 10 March 2011, JISC Conference with contributions from Birkenhead Sixth Form College and Salford University.

### **4.3 Online outputs**

The final case study outputs were prepared for online rather than print presentation. We worked to extremely tight word limits and tried to keep the language as clear as possible. Having full transcripts of the interviews and a collection of documentation to hand was essential in being able to illustrate the case studies with key quotes.

As well as being succinct, online presentation allowed us to produce rich media case studies. The original intention was that we would collect video at the site visits and edit out a few suitable extracts for each output. We found this was much harder to do than expected. Despite having a high quality video camera, we did not always have the skill or time necessary to set up and operate the camera during the interview. The video obtained was of variable quality and took considerable time to edit. We did

find however that most sites already had video and/or audio which they had produced and we linked to or uploaded extracts from what was available.

We used some of the project funded to allow a web developer to make the case studies available online. As well as dealing with the media, the developer created a navigable interface, with multiple ways of finding and browsing through the studies. Working with a professional developer in the final stages helped us with version control of the documents with only two versions permissible: draft and final.

Another reason for our choice of online delivery is that it allows us to provide further resources (or 'assets') to extend each case study. We anticipated that these would be real items used in practice such as course handbooks, activity briefs, strategy documents or implementation plans. As we have found previously, these are quite difficult to obtain, but they are the kinds of resources which are meaningful to practitioners and worth sharing.

We were asked for print versions of the case studies at the end of the project but this would take re-versioning which we were not resourced to do. It might be useful for future projects to anticipate that there is still demand for print versions.

We had clear reasons then for creating an online resource. It would be interesting to assess the extent to which the resources are being used in the ways anticipated.

## **5. Conclusions**

### ***5.1 Reflections on a case study methodology***

Case studies are widely used in projects such as these, which are attempting to identify, locate and share practice in the sector. We were aware from the start that there was a great deal of variation in the style and purpose of such studies. Rather than collating showcases, we intended the co-creation of these case studies to be a developmental intervention. We saw benefits in both improving our understanding of the challenges of supporting learners from the start of the project and in provoking staff at our host institutions to question the approaches they were adopting. At one of the dissemination events (Section 4.3) staff from a case study shared their reasons for and experiences of being a case study as:

- Sharing and promoting Surrey's work – nationally and internally
- Becoming part of a network; future collaboration
- Opportunity to pause and review; question what we do
- Catalyst for further internal conversation and collaboration
- Part of a process, not end in itself

This goes some way to support our original rationale. However, it also highlighted for us the potential for evaluating the case study's experiences. It would have been valuable to build in some time to the project to elicit reflections from the case studies on their experiences.

We do know however that at least two of the case study sites are using the experience of the SLiDA case studies to continue such an approach. Edinburgh University, are gathering examples of good practice in learning and teaching from across the College of Science and Engineering to help inform future practice across the college. Based on experiences in the SLiDA project, it has been decided to develop these examples as a knowledge base of short, focused, interactive online case studies grouped into crosscutting themes. At Oxford Brookes University, the model of the SLiDA case studies has informed a project to collect case studies of how modules and programmes are embedding the university's new graduate attributes.

## **5.2 Recommendations for projects using case studies**

- a. Allow time to circulate invitations for case study sites and anticipate the demands of the selection process.
- b. Anticipate institutional legal and financial approval processes and simplify these as far as possible.
- c. Establishing a trusting, open relationship with case studies is important in eliciting data. For us, the knowledge and skills of the consultants was crucial, and they were helped by having a small number of sites each allocated to them. The continuity in contact between the case study site and a single, named consultant was important from the start.
- d. The cycle of multiple interactions helped to keep case study sites focussed on our research questions and assisted in creating a sense of belonging and commitment to the project and its aims.
- e. Visits are expensive and time consuming. For us they worked well as the culmination of the data collection process. Consultants needed at least a day between visits and preferred to work in pairs.
- f. Audio recordings were essential for data collection and subsequent transcription. Most sites were able to provide us with video without us needing to collect it.
- g. Co-creation (as opposed to collection) of case studies is complex and requires negotiation. Engaging colleagues in dissemination events helped to develop a shared understanding of their story.
- h. Build in evaluation from the start: Take time to ask participants what they got out of being a case study and think about how to evaluate how your resources are being used.

## **5. References and notes**

<sup>1</sup> See the final Synthesis Report from the Support and Synthesis project of Phase 2 Learner Experiences of E-Learning programme at <https://mw.brookes.ac.uk/display/JISCle2f/Findings>

<sup>2</sup> See the final report from the Learning Literacies in a Digital Age project at <http://www.jisc.ac.uk/whatwedo/projects/elearningllida.aspx>

<sup>3</sup> See the outputs from the JISC Digital Literacies Pilot Materials project at <http://cloudworks.ac.uk/cloud/view/4293>

<sup>4</sup> The case study template used in the JISC Effective Practice with E-learning Guide is at [www.jisc.ac.uk/uploaded\\_documents/casestudytemplate.doc](http://www.jisc.ac.uk/uploaded_documents/casestudytemplate.doc)

<sup>5</sup> The proforma used to collect snapshots for the LLiDA project is available at <http://www.academy.gcal.ac.uk/llida/exemp.html>

<sup>6</sup> The image consent form is available as part of the JISC Intellectual Property Rights Toolkit at <http://www.jisc.ac.uk/publications/programmerelated/2009/scaiprtoolkit/2modelconsentform.aspx>

<sup>7</sup> Videos of some of the SLiDA case studies presenting at ELESIG event are available (ELESIG login required) at:

Surrey

<http://elesig.ning.com/video/the-slida-project-colab-12>

<http://elesig.ning.com/video/the-slida-project-colab-22>

Oxford Brookes –

<http://elesig.ning.com/video/the-slida-project-codifying>

<http://elesig.ning.com/video/the-slida-project-codifying-1>

<http://elesig.ning.com/video/the-slida-project-codifying-2>

Wolverhampton-

<http://elesig.ning.com/video/the-slida-project-what-works>

<http://elesig.ning.com/video/slida-what-works-for-students>