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Blended and Online Learning Policy Development in Higher Education: Key Considerations

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The global use of blended and online learning (BOL) in higher education has recently increased due to the COVID-19 pandemic. This exponential expansion requires higher education institutions to prioritize scholarship and examine the policies, frameworks, practices, and structures that support a clear objective toward high-quality BOL that is cohesive across faculty and programs. Within Canada, the U15 Group of Canadian Research Universities (U15s) describe the top research universities that exemplify the production of scholarship that influences research and policy within and outside higher education institutions. Through conducting two environmental scans of BOL policies at the U15s in 2022, the authors identified important elements of BOL policies that could be useful in future institutional planning and decision-making related to modality. The authors isolated key themes that would benefit institutions in standardizing and offered comprehensive strategies and limitations to ensure consistent regulation of BOL policies. Ultimately, there is no singular approach to creating effective policy regarding BOL. However, creating and implementing BOL policy is necessary for high-quality BOL practices.

Keywords: Blended and online learning, Policy, Higher education, U15s

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Globally, the COVID-19 pandemic has led to increased usage of blended and online learning (henceforth, BOL) in higher education (Bhagat & Kim, 2020; Coman et al., 2020). Higher education institutions constantly search for effective ways to create, enhance, and sustain BOL practices. This research brief focuses on common considerations of BOL policies based on two environmental scans of the present BOL policies and guidelines at the U15 Group of Canadian Research Universities (U15s), the top research universities in Canada. The authors conclude with recommendations regarding BOL policy development.

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Background

King and Alperstein (2017) emphasized that the effectiveness and success of higher education BOL programs depend on a clear institutional vision and strategic plan with clearly defined policies, processes, and structures. Yet, definitions of BOL vary, leading to challenges in policy creation. For example, Graham (2006) described blended learning as a combination of in-person and digital instruction. In contrast, Garrison and Kanuka (2004) emphasized the subjective nature of both in-person and online learning environments. Furthermore, online learning is difficult to define due to its conflation with other forms of learning, such as distance learning and e-learning (Moore et al., 2011; Singh & Thurman, 2019). Policy definitions also include discrepancies. According to Delaney (2017), policy should be established by a variety of institutional stakeholders with a clear aim.

In contrast, Pal (2006) defined policy as "a course of action or inactivity determined by a public authority to handle a given problem or interrelated set of problems" (p. 2). Ultimately, King and Alperstein (2017) emphasized that BOL policies should be clearly defined and should reflect the interests of all institutional stakeholders engaging in BOL. For context, Freeman (1984) defines a stakeholder as “Any group or individual who can affect or is affected by the achievement of the organization’s objectives” (p. 46). As such, stakeholders include, but are not limited to, students, faculty, staff, administrators, and donors.

Methods

In January 2022, the first author conducted an environmental scan of the U15 Group of Canadian Universities (U15s) by reviewing the websites of each U15 for policies related to BOL (Table 1). The U15 Group of Canadian Research Universities is a collective of Canada's top 15 research-intensive universities. These institutions are recognized for their leadership in research

and higher education, conducting “79 percent of all competitive university research in Canada” and producing “more than 70 percent of all doctorates awarded in Canada” (U15 Group of Canadian Research Universities, 2016). The scan involved reviewing the websites of each U15 institution to identify policies, guidelines, or frameworks that addressed BOL practices. The search identified existing policies, guidelines, or frameworks concerning blended and online learning (BOL). To capture a comprehensive view, we employed a range of search terms, including variations like “blended learning policy,” “online learning guidelines,” “BOL framework,” “e-learning strategies,” “digital learning policy,” and “remote learning guidelines.” Recognizing that universities may use different terminology, additional terms like “BOL guidelines,” “blended learning frameworks,” and “online learning practices” were also included. Specific U15-related terms, such as “U15 BOL policy” and “U15 online learning guidelines,” were used to focus on the Canadian research universities. The first author conducted a second scan in October 2022 to determine if any new policies had emerged or had been updated. The secondary environmental scan results noted that the University of Ottawa and Queen’s University initially had guidelines for BOL, but those guidelines were removed by October 2022. It was determined that only one U15, the University of British Columbia, had an explicit BOL policy which only encompassed assessments, though it was later replaced by more general guidelines. Additionally, three U15s outlined BOL guidelines that recommended BOL practices: Dalhousie University, McMaster University, and the University of Toronto. The U15s that had neither a BOL policy nor guidelines were McGill University, Queen’s University, Université de Montréal, University Laval, University of Alberta, University of Calgary, University of Manitoba, University of Ottawa, University of Saskatchewan, University of Waterloo, and University of Western Ontario. The second author organized critical aspects of the existing BOL

policy and the three guidelines into nine themes through thematic analysis (Braun & Clark, 2006). Specifically, the thematic analysis included the coding and organization of data into succinct themes, isolated as academic integrity, accessibility, assessments, cybersecurity, framework development, professional development and support, student engagement and support, technology, and terminology.

Table 1

List of U15 Universities and Corresponding BOL Policies

U15 University	BOL Policy Website
University of Alberta	No BOL policy
University of British Columbia	https://distancelearning.ubc.ca/learner-support/policies-and-procedures/
University of Calgary	No BOL policy
Dalhousie University	https://www.dal.ca/dept/clt/e-learning/elearning_strategy.html
Université Laval	No BOL policy
University of Manitoba	No BOL policy
McGill University	No BOL policy
McMaster University	https://studentsuccess.mcmaster.ca/writing-and-academic-skills/online-learning/
Université de Montréal	No BOL policy
University of Ottawa	No BOL policy
Queen's University	No BOL policy
University of Saskatchewan	No BOL policy
University of Toronto	https://www.sgs.utoronto.ca/policies-guidelines/online-learning-guidelines/

University of Waterloo	No BOL policy
Western University	No BOL policy

Results

Table 2 illustrates key themes identified within the existing BOL policy and guidelines at the U15s (See Appendix A).

Table 2

BOL Policy and Guideline Themes

Document	Theme and Definition	Implications	Universities
Guideline	Academic Integrity: The responsibility of ethical student participation in academia	1. Consistent consequences are outlined in response to breaches of academic integrity 2. Comprehensive academic integrity information appears on all course syllabi	McMaster University
Guideline	Accessibility: The ability to have comprehensive physical, cognitive, and financial access to learning	3. BOL features and practices are purposefully included so BOL can be accessed by all students 4. The Universal Design for Learning framework and assistive technologies are implemented into BOL classrooms	University of Toronto
Policy	Assessments: The assessment of knowledge through virtual tests, projects, and essays	5. A clear procedure is followed when assessments are incomplete or plagiarized 6. Deadlines, procedures, and technological tools regarding the submission of students' final grades is standardized	University of British Columbia

Guideline	Cybersecurity: How digital information is secured, accessed, and used by the institution	7. Stakeholders' access to information is consistent and monitored 8. Cybersecurity training is established, alongside outlining protocol in response to cybersecurity threats	McMaster University
Guideline	Framework Development: The improvement of BOL practices and designs over a consistent timeframe	9. Institutional BOL approaches are continuously improved and reviewed as BOL evolves 10. BOL models are created as a framework for BOL course creation and maintenance 11. Feedback about BOL from all university stakeholders is collected and organized	Dalhousie University
Guideline	Professional Development and Support: How faculty are supported through BOL knowledge expansion	12. BOL resources within and outside of the classroom are promoted for faculty use 13. BOL training opportunities for stakeholders are provided	Dalhousie University University of Toronto
Guideline	Student Engagement and Support: How students interact and receive guidance in BOL	14. Technologies and strategies used to enhance students' BOL experiences are implemented 15. Interactive features and instructor presence are upheld to ensure student engagement and accessibility	Dalhousie University McMaster University University of Toronto
Guideline	Technology: The virtual tools utilized to convey and expedite knowledge transfer	16. Training opportunities for technology within the BOL classroom are provided, alongside standards for appropriate use 17. Feedback systems from stakeholders are organized to improve upon BOL technologies	University of Toronto
Guideline	Terminology: The linguistic etiquette that is	18. An outline of appropriate and inappropriate language within BOL environments	University of Toronto

	appropriate within BOL	19. A comprehensive definition of BOL that is consistent throughout all faculties	

The following themes encompass recommendations that would be useful for BOL policy development.

Academic Integrity

Academic integrity is a fundamental aspect of BOL, as it entails the respect and responsibility students must demonstrate when participating in class. Many institutions have established and are committed to maintaining high standards of academic integrity within their programs. According to McMaster University's (Student Success Centre, n.d.) guidelines, clear definitions of academic integrity are vital when implementing BOL policy, alongside standardized consequences and procedures that address breaches of academic integrity. Furthermore, BOL policy should transparently address these standards within all course syllabi across the institution. From these standards, BOL policy results in more explicit expectations about academic integrity in BOL that are consistent across the institution for all stakeholders.

Accessibility

Institutions are responsible for ensuring that BOL environments are accessible for all students with diverse physical, cognitive, or financial abilities. To achieve this, The University of Toronto (School of Graduate Studies, 2022) posits that accessibility must address key design factors that encourage all students to participate in class online with the standards of equity, diversity, and inclusion (Accessibility, n.d.), which can be addressed within BOL policy. Additionally, institutions should incorporate UDL (Universal Design for Learning) frameworks within these environments, ensuring consideration and awareness of the diverse needs of all learners. The policy should also promote incorporating assistive technologies to support students'

learning needs, alongside partnering with technology providers to consistently improve the quality of this technology. Finally, accessibility resources must be communicated to all stakeholders to raise awareness regarding the multiple dimensions of accessibility.

Assessment

The University of British Columbia accentuates that assessments encompass the evaluation of student knowledge through virtual tests, projects, and essays (Policies and procedures, n.d.). Regarding BOL policy, this university emphasized explicit definitions of plagiarism and outlined responses to incomplete or plagiarized assessments, which was connected to the institution's policy on academic integrity. In addition, the policy must address the deadlines and procedures for submission of students' final grades. Institutions must also provide clear appeal processes for students who miss deadlines due to technical issues or personal circumstances.

Cybersecurity

Investing in cybersecurity is essential, especially in BOL environments: It is the institution's responsibility to ensure that digital information is secured, accessed, and used by the institution to protect stakeholders' privacy. All stakeholders must be informed regarding the procedures for protecting this digital information (University Technology Services, n.d.). The policy framework should also highlight the guidelines and consequences in place when disregarding cybersecurity. Institutions should be committed to providing secure BOL spaces, considering confidentiality, integrity, and availability of digital information. As digital spaces change frequently, institutions should prioritize reviews to question if the present framework is still effective in protecting the institution's BOL environments.

BOL Framework Development

To ensure BOL environments are practical and successful, it is essential that BOL design be improved upon indefinitely, as BOL continues to evolve (Centre for Teaching and Learning, 2019). In creating this framework, feedback from stakeholders is valuable and must be utilized to improve the BOL experience, which prompts the creation of various positions or teams to collect and use this information:

Chief Online Learning Officer (COLO)

This senior administration role establishes online learning budget goals, examines strategies for improving online classrooms, oversees stakeholder training in online learning environments, and focuses on implementing BOL policies (Christians, n.d.; Garret et al., 2021; Herron et al., n.d.). Ultimately, the COLO ensures consistency throughout online learning within the institution. COLOs did not appear in any of the U15 policies and guidelines regarding BOL.

Online Program Manager (OPM)

This role coordinates online learning programs that expand across different institutions (Cote & White, 2020). Thus, the OPM is responsible for cross-institutional collaboration to foster consistency and quality in online learning across different institutions. OPMs did not appear in the U15 policies and guidelines regarding BOL.

Councils and Committees

The Coordinating Council liaises between administrators, professors, and students who have experience in BOL, often through faculty representatives who report information to this council (Lim et al., 2019). Once these experiences are synthesized, they are passed to a Steering Committee, which manages and creates new BOL initiatives. All this information is streamlined to the vice president for teaching and learning, who records new knowledge. Creating these roles can improve the efficacy of BOL and ensure that stakeholder feedback is used to refine BOL

environments continuously. Coordinating councils did not appear in any of the U15 policies and guidelines regarding BOL.

Professional Development and Support

Faculty within BOL environments should be provided with professional development and opportunities to improve their knowledge regarding BOL to enhance the quality of their courses (Centre for Teaching and Learning, 2019; School of Graduate Studies, 2022). This type of professional development could include workshops, training sessions, online courses, and conferences. It should be provided in various formats and at varying times to ensure faculty availability. In addition, the institution should regularly evaluate and assess the effectiveness of these opportunities and encourage modifications as needed.

Student Engagement and Support

Student engagement and support are essential to BOL to ensure positive and fulfilling learning experiences (Centre for Teaching and Learning, 2019; School of Graduate Studies, 2022; Student Success Centre, n.d.). Technologies and strategies, especially instructor presence, must be utilized to enhance students' BOL experiences. In addition, institutional guidelines should support instructors in facilitating effective communication between themselves and students. Finally, it is critical for institutions to collect feedback from students to ensure that they are receiving the necessary and relevant support within their BOL experiences.

Technology

Technology is a vital component of BOL environments and includes the virtual tools used to convey and expedite knowledge transfer (School of Graduate Studies, 2022). It is critical that institutions provide training opportunities for all stakeholders in appropriate technology use within BOL classrooms. Higher education institutions must establish clear definitions for the

proper uses of the technology within these BOL environments. Finally, institutions should ensure opportunities for stakeholders to provide feedback to ensure the best use of these technologies.

Terminology

It is important for institutions to provide consistent and unambiguous terminology within BOL environments (School of Graduate Studies, 2022), and this should be a strong focus of the framework. Institutions must ensure that a comprehensive definition for BOL is established and consistently used throughout all faculties and programs. Institutions must also provide guidelines surrounding appropriate and inappropriate terminology, ensuring all stakeholders understand what language is acceptable in BOL environments. Finally, feedback from all stakeholders should be collected to improve and continuously add terminology used in BOL environments.

Discussion

Our findings indicate that BOL policies promote clarity, consistency, and continuity in decision-making related to modality and program delivery in higher education (Ashraf et al., 2021; Rajabalee & Santally, 2021). Based on our review, we recommend that future research focus on creating diverse frameworks that inform BOL policy development. Given the paucity of dedicated BOL policies in the U15s, we recognize that the absence of dedicated BOL policies may contribute to a lack of consistency and/or frustration with the lack of direction (Thurab-Nkhosi, 2018).

Subsequently, we offer a secondary recommendation for future research that targets in-depth research on the nine themes we addressed in our analysis: academic integrity, accessibility, assessments, cybersecurity, framework development, professional development and support, student engagement and support, technology, and terminology. Throughout our research brief, we discussed the broad implications of these themes and how they can be implemented

into BOL policy development. Yet, more research is necessary to provide specific recommendations regarding each of these themes so policymakers have access to in-depth analysis for appropriate policy implementation. This is especially pertinent as BOL policy development is under-researched due to policy research focusing separately on online learning (Rajabalee & Santally, 2021) and blended learning (Ashraf et al., 2021; Oleshko et al., 2022).

Our third recommendation relates to consistency in the process and formation of BOL policies across different faculties within higher education institutions. This uniformity should reflect consistent terminology used in each policy to ensure stakeholders are clear about each aspect of BOL policies and what those terms mean. Institutions may also benefit from dedicating sufficient resources to support stakeholders during the development and implementation of BOL policies and emphasize transparency of these policies with stakeholders. Regarding consistency, it would be helpful for the U15 organization to provide clear frameworks guiding BOL policies to ensure consistency across these institutions.

Throughout these recommendations, it is critical to recognize that the nine considerations for a BOL policy framework we discuss here should be adapted to each institution's unique circumstances. Before implementation, the institution's administration and stakeholders should review and approve these policies before implementation. As mentioned above, we underscore the importance of committees supporting programs, educators, and students through resources, tutorials, and training. Finally, a clear plan for evaluating and assessing BOL policies is pertinent, alongside addressing challenges for any stakeholders who implement or execute the policy.

Conclusion

BOL requires cohesive policy development at U15s, which we uncovered through two environmental scans. These institutions must address the key themes of academic integrity, accessibility, assessments, cybersecurity, framework development, professional development and support, student engagement and support, technology, and terminology in future BOL policy creation. Further, key discussion points that examine the gaps in research regarding BOL, the importance of consistency within BOL policies, and the regular assessment and updating of these policies are all important considerations and avenues for future research. Ultimately, this review is a launching point into the importance and complexity of BOL policies to ensure that all higher education stakeholders receive the best experiences within BOL environments.

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Appendix A

Key Considerations for BOL Policy Development