

University of the South Pole: A Case Study

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Institutional Overview

The University of the South Pole (USP) was established in 1908, shortly after the Shackleton expedition. Originally very small it has now grown to serve a large population of scientists, support staff and people fleeing climate change and pollution in the northern hemisphere. The priorities facing the continent are reflected by the focus of the faculties, which include the Faculty of Engineering, Faculty of Geology and Petrochemistry and the Faculty of Antarctic Studies.

This once proud and successful institution now faces a significant set of challenges. Changes in government funding priorities have seen revenues decline, both for teaching and for research. Competition from the two other higher education providers, the Byrd University (BU) and the Open University of the South (OUS), for students and research funding has seen pressure fall on the USP management to decide on strategic and operational priorities for the future.

A strategic plan promoting the use of e-learning as a solution to the problems facing the USP has been proposed and reflects the strong positions being taken by some middle managers and academics. The Vice Chancellor, Professor Marshall, has asked that you help determine his priorities for action over the next three years. He feels some independent perspectives can assist his understanding of the challenges facing the USP, as he is not opposed to greater use of e-learning, but is concerned that the internal advice he is getting is biased towards this strategy and potentially not taking into account other factors.

Basic Facts about the USP

	USP
UG Students (FTE)	15,648
UG Students (Actual)	23,587
PG Students (FTE)	3,406
PG Students (Actual)	7,504
Courses	1,254
Fully Distance Courses	10
Fully Online Courses	8
Academic Staff (FTE)	702
Academic Staff (Actual)	798
General Staff (FTE)	1,265
General Staff (Actual)	1,654
Total Revenue (\$Millions)	208
Teaching Revenue (\$Millions)	180
Research Revenue (\$Millions)	28
Operating Surplus (Deficit)	(4.2)

USP Statement of Accounts 2007

The year 2007 has been challenging for the University community as it faced up to a slight decline in enrolments in 2005 and 2006 and changing government funding priorities. The University recorded an operating deficit of \$4.2m in 2007 compared with a \$3.5m surplus the previous year.

Earlier in the year, after the first trimester enrolment census, the University budget was adjusted for a slight decline in enrolments. The revised budget projected a deficit of \$11.7 million. Faced with this prospect, management and the University community embarked on a comprehensive financial review, together with the implementation of spending restraints across all University departments.

By year end the deficit was reduced to \$4.2 million. This was achieved through improved student revenues, higher commercial, research and other income, a reduction in net operating costs and a reduction in depreciation. During the year the University reviewed its valuation policy for fixed assets. The most significant change was a decision to reverse the policy of revaluing the general library collection. In the Council's view, recording library assets, which are unlikely ever to be sold, at historic cost provides a more appropriate valuation basis.

While the immediate financial position of the University improved during 2007 the outlook for 2008 and 2009 remains challenging due to a lack of growth in student numbers. The University faces these challenges from a strong financial position, underpinned by cash holdings at year-end of \$25m. The management team, staff and Council are all determined to reach a position where the strong academic traditions and reputation of the University will be supported by a strong and robust financial base.

Statement of Financial Performance as at 31 December 2007

	2007: \$000	
	Actual	Budget
Equity at end of year	291 187	355 286
Current Assets		
Cash at Bank	1 377	1 200
Short Term Investments	19 342	15 040
Accounts Recievable	3 770	2 623
Pre-paid Expenses	501	29
Pre-paid Library Subscriptions	123	1 548
Inventories	195	379
Total Current Assets	25 308	20 819
Non Current Assets		
Fixed Assets	279 581	342 099
Construction in Progress	624	1 188
Shares and Advances	4 475	4 802
Prepaid Rent	2 000	2 000
Software Assets	1 458	1 892
Total Non Current Assets	288 138	351 981
Total Assets	313 446	372 800
Liabilities		
Accounts Payable and Accruals	10 619	10 307
Prepaid Revenue	4 2229	782
Research Grants Not Fully Expended	1 326	1 530
Provision for Annual Leave	6 085	4 895
Total Liabilities	22 259	17 514

Revenue		
Government Grants	98 525	103 637
Tuition Fees	79 953	80 307
Research Support	3 577	1 370
Commercial	18 636	7 651
Student and Family	5 981	5 945
Other	1 674	1 079
Total Operating Revenue	208 346	199 989
Less Cost of Services		
People	125 136	121 721
Occupancy	31 538	33 283
Equipment	1 328	2 069
Operating	43 060	41 153
Depreciation	11 511	13 426
Total Cost of Services	212 573	211 652
Surplus (Deficit) for Year	(4 227)	(11 663)



University of the South Pole

E-Learning Strategy 2008-2011

DRAFT

Background

The University of the South Pole is, and will continue to be, a leading Southern Hemisphere research and teaching institution. The University has a powerful tradition of achievement, much of it built on activities that benefit from the association with Antarctica. USP will build on past successes to further enhance its contribution to the world's cultural, economic and social development. Guided by the values set out in its Charter, it will provide a high quality and stimulating learning experience for students, produce internationally-distinguished research, and contribute to enhancing the quality of life of the community in which it is based.

High quality research and teaching are at the heart of world-class universities. In positioning itself as a first tier University in the Southern Hemisphere, USP is guided by a set of attributes that will focus and shape its endeavours in these two spheres. These attributes are vital to its culture, determining decision-making in direct and powerful ways. The University will craft its staff recruitment, programme structures, student support, policies, and operating and capital investment towards establishing an optimal learning environment that will secure desired outcomes. Its graduates will be distinguished by their capacity for independent, creative and critical thought, their excellent communication skills and their ability to take a leadership role in an increasingly diverse, technologically sophisticated and complex global society.

The international profile of successful universities is heavily dependent on the quality and commitment of its staff: both academic and general. The University will embrace the change to e-learning as an opportunity for its staff and students and commit resources to recruiting, developing and providing opportunities to talented staff. Emphasis will also be placed on other conditions which make a university an attractive place to work, such as teaching and research facilities and opportunities.

USP is strongly entrenched in Antarctica as an international centre, as well as a local and regional community. This is a source of its strength and distinctiveness. In future it will give even more strategic focus to this relationship in terms of research, teaching programmes, formal alliances, consultancy and community service. There is a strong, symbiotic relationship between the University and the various research bases, and through their combined efforts they will make Antarctica an even more desirable destination of choice for students.

Participation rates in tertiary education will increase as "knowledge society" skills become more important for larger proportions of the workforce. Higher levels of participation will not, however, guarantee USP sustained enrolments. Much of the growth in participation will be from people with work experience, demanding courses that are focused on careers rather than traditional academic disciplines. They will require the flexibility to take courses while they remain in employment (as rapid technological and societal change increases the rate of mid-career adjustment and increases the demand for retraining). To be successful in this area, the University will need to develop flexible, interdisciplinary, postgraduate, post-experience and professional development programmes alongside traditional disciplinary postgraduate programmes. With such programmes the University will build on its strategic

relationships with the research base communities. The high proportion of mature students doing postgraduate programmes needs to be properly accommodated and fluctuations in enrolments need careful management.

Competition from Byrd University, the Open University of the South Pole and alternative providers “virtual” and distance from overseas and new sectors (business, entertainment industry) – is likely to increase markedly. Developments in information technology will change the ways USP, and other institutions, deliver the educational experience.

Many international students come to USP seeking an educational experience that differs from that in North America, Australia, Asia and Europe. USP can provide international students with this, and do so in the most unspoilt and clean environment on Earth, but it must be responsive both to the needs of those students and to the impact of humanity on that environment and the restrictions it imposes on our activities.

Executive Summary of Key Themes

1. We will continue to develop high quality, viable e-learning with strong academic content and technical support aimed at meeting the needs of our students and which sits within a continuum of delivery ranging from fully online to fully face-to-face.
2. We will use technology to drive our learning and teaching direction away from mass education to focus on mass personalisation of education.
3. We will continue to grow and develop an extensive e-learning portfolio in support of the University’s wider mission and strategies as laid out in the University Strategic Plan.
4. We will develop e-learning using a services approach, with a clear focus on integrating the student experience and supporting systems with mainstream university academic and administrative systems.
5. Ensure that new e-learning programmes are, prior to approval, subject to carefully scrutiny of the associated business case and the quality assurance arrangements.
6. We will continue to build on our strategic partnerships with Antarctic research organisations so as to ensure we are able to address the learning needs of their staff and so that our students can participate in opportunities for work placements and collaborative research projects.

Critical Success Factors

- * A diverse portfolio of sustainable, quality assured, e-learning programmes which meet the needs of identified customer groups;
- * Motivated academic staff, well supported and provided with opportunities both to experience e-learning themselves and to be trained as effective e-learning practitioners;
- * A reliable, high performing and robust technology infrastructure able to meet the needs of the University and its students as demand for e-learning grows;
- * A set of sustainable strategic partnerships in place which enable the University to build regional partnerships for delivery and sourcing of students.

Definition

For the purposes of this document, e-learning is defined as:

“the use of digital communications technology to support the learning activities of students, the teaching activities of staff, and the administration of the process by the University.”

Strategic Objectives

The objective of this Strategic Plan is to define specific and measurable objectives that will provide the context for planning and resource allocation decisions in the immediate future. These objectives inform University-wide Plans and School and Central Services Unit Plans.

1. We will continue to develop high quality, viable e-learning with strong academic content and technical support aimed at meeting the needs of our students and which sits within a continuum of delivery ranging from fully online to fully face-to-face.

Objective 1.1 By 31 December 2008 all USP programmes will have a plan for delivery and technology use linked to School and University-wide plans.

Objective 1.2 By 31 December 2008 all Central Service Units will have strategic plan specifically addressing the impact that fully online delivery will have on their services.

Objective 1.3 By 31 December 2009 all USP academic staff will have completed an approved training programme in designing and delivering courses online.

Objective 1.4 By 31 December 2009 all USP student services will be available to all students irrespective of the mode of delivery.

Objective 1.5 By 31 December 2009 all USP Library services and resources will be available to all students irrespective of the mode of delivery.

2. We will use technology to drive our learning and teaching direction away from mass education to focus on mass personalisation of education.

Objective 2.1 By 31 December 2010 all USP students will have been provided with a tailored learning plan able to be maintained and developed as they undertake their studies.

Objective 2.2 By 31 December 2009 10% of all USP courses will be able to be undertaken in self-study mode without the intervention of academic staff and commencing at any time during the year.

3. We will continue to grow and develop an extensive e-learning portfolio in support of the University's wider mission and strategies as laid out in the University Strategic Plan.

Objective 3.1 By 31 December 2009 15% of all USP courses will be able to be undertaken fully online, by 31 December 2011 40% of all USP courses will be able to be undertaken fully online.

Objective 3.2 By 31 December 2008 CITL will establish and administer a programme of competitive internal research grants supporting academic staff research into teaching and learning.

4. We will develop e-learning using a services approach, with a clear focus on integrating the student experience and supporting systems with mainstream university academic and administrative systems.

Objective 4.1 By 31 December 2008 ITS will complete a systems audit using the JISC/DESC E-Framework to identify which systems are compliant. By 31 July 2009 a plan for addressing non-compliant systems will be created for consideration in the 2009/10 budget planning round.

5. Ensure that new e-learning programmes are, prior to approval, subject to carefully scrutiny of the associated business case and the quality assurance arrangements.

Objective 5.1 By 31 December 2009 the office of the AVC Academic will provide a process for reviewing and updating business cases for all existing e-learning courses and programmes using a 'balanced scorecard' methodology.

Objective 5.2 By 31 December 2010 USP e-learning courses will have completed a full Quality Assurance review. Such reviews will be undertaken after every third offering of the course.

Objective 5.3 By 31 December 2009 the complete programme of USP e-learning courses will demonstrate their ability to be fully self-supporting in financial terms.

6. We will continue to build on our strategic partnerships with Antarctic research organisations so as to ensure we are able to address the learning needs of their staff and so that our students can participate in opportunities for work placements and collaborative research projects.

Objective 6.1 By 31 December 2008 three new research or e-learning workplacement agreements will be ratified by Council.

Objective 6.2 By 31 December 2008 a review of all existing partnerships will be undertaken by the Projects Office.

Objective 6.3 By 31 December 2009 10% of all USP courses will make use of Access Grid facilities to provide collaborative teaching opportunities involving external experts and students.

Brief Descriptions of the Other Insitutions

	BU	OUS
UG Students (FTE)	9,278	12,405
UG Students (Actual)	10,597	28,544
PG Students (FTE)	4,102	2,677
PG Students (Actual)	4,908	6,489
Courses	654	2,204
Fully Distance Courses	0	1,845
Fully Online Courses	0	1,540
Academic Staff (FTE)	620	864
Academic Staff (Actual)	635	2,245
General Staff (FTE)	1,045	946
General Staff (Actual)	1,102	1,054
Total Revenue (\$Millions)	340	235
Teaching Revenue (\$Millions)	170	210
Research Revenue (\$Millions)	170	25
Operating Surplus (Deficit)	22	7

Byrd University (BU)

Byrd University routinely promote themselves as the top research institution of the South, and they have been very successful in persuading the government to provide them with research funding over and above that provided to other institutions. They have a well-regarded Medical School and Faculty of Engineering.

All teaching at BU is conducted face-to-face and with an emphasis on progression to post-graduate study. Entry to all programmes is restricted and keenly competed for by students. Substantial investment has been made in student accomodation to address the inability of students to travel throughout the southern winter, with almost all of the students and staff resident on campus.

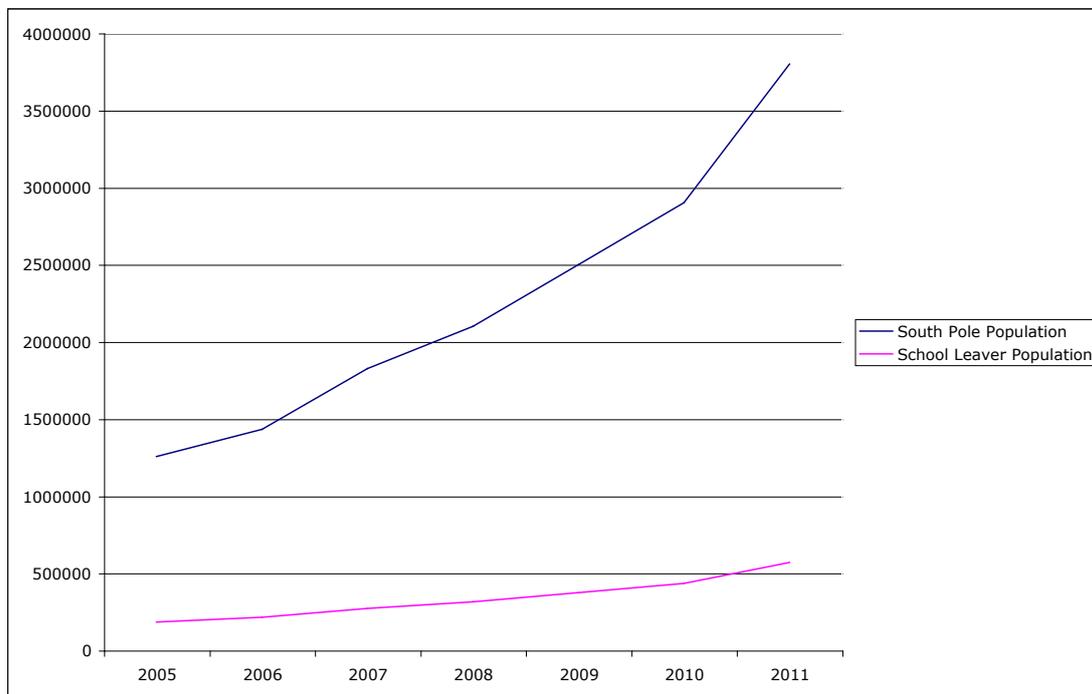
Open University of the South Pole (OUS)

Originally a technical institution providing trades training the OUS was reclassified fifteen years ago as a degree granting university specialising in open and distance provision. Under its current VC, Deb Shepherd, it has aggressively pursued the adult student demographic, particularly those students who are intending to gain further qualifications while engaging in full time work. Until recently they have used traditional paper and video distance delivery materials to support student learning. Over the last five years they have invested substantially in the development of online materials and an infrastructure to support online learning and teaching.

Many of their staff are employed part time and come either from the South Pole workforce themselves or they are academics from Australian or New Zealand universities who are employed under contract. Consequently research performance of the OUS is not strong, although they are successful in the applied areas.

Demographic Projections for the South Pole

Overall Population of the South Pole (data for 2008-2011 based on government projections)



USP Enrolment Data (2005-2007)

