

Sustainable Institution Building for Open Learning

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Abstract

In the transition to a post pandemic world, educational institutions are faced with the challenge of helping to build a more responsive and robust education system in the volatile, uncertain, complex, and ambiguous present and future. This requires critical reflection on lessons learned during the pandemic, reimagining the future of higher education as well as institutional directions, and adopting new strategies for development. This session describes a program to build the capacity of Philippine colleges and universities in this important work.

The Sustainable Institution Building for Open Learning (SIBOL) initiative, as it is called, aims to provide participating higher education institutions with training and mentoring in planning, managing, and sustaining blended, online, and open learning (BOL) programs. Phase 1 of SIBOL consists of seven online training modules, delivered synchronously and asynchronously, on planning BOL programs; systems for BOL materials development, technology management, faculty development, and student support; quality assurance; and research and innovation for sustainability of BOL. Phase 2 is a mentoring program for participating institutions as they implement their BOL institutional strategy. This second phase also aims to strengthen institutional collaboration and networking towards building the open and distance learning ecosystem in the Philippines.

In this paper, early findings from the design, development, and pilot implementation of SIBOL are discussed. SIBOL was conceptualized as UPOU's pilot project under the EU-funded Advancing Equity and Access to Higher Education through Open and Distance Learning (BUKA) project.

Key words

capacity building in blended, online, and open learning

1. Introduction

In 2014, with the enactment of Republic Act (RA) 10650, the Philippine government expressed its commitment “to expand and further democratize access to quality tertiary education through the promotion and application of open learning as a philosophy of access to educational services, and the use of distance education as an appropriate, efficient and effective system of delivery.” Although the Philippines has close to 2,000 public and private higher education institutions (HEIs) and a free tuition policy for undergraduate education in state universities and colleges (SUCs) is now in place, access to *quality* higher education is limited. Open and distance learning (ODL) can improve access to quality tertiary education in both conventional and distance education institutions.

However, it was not until the COVID-19 pandemic that the majority of Philippine HEIs began to take ODL seriously as a mode of learning delivery. In fact all HEIs had to shift to ODL or remote and online learning. Subsequently, in September 2020, the Philippine Commission on Higher Education (CHED) issued *Guidelines on the Implementation of Flexible Learning*, which is defined as “a pedagogical approach allowing flexibility of time, place, and audience, including but not solely focused on the use of technology.” Three modalities of flexible learning are identified: offline, blended, and online. The *Guidelines* instructs HEIs to “implement... capacity-building programs for administrators, faculty, and staff on transitioning to flexible learning” and encourages them “to form consortia, coalition, or networking [sic] to facilitate capacity-building programs and sharing of resources.”

Meanwhile, RA 10650 mandates the University of the Philippines (UPOU) to assist CHED and the Technical Education and Skills Development Authority (TESDA) in helping “other interested educational institutions in developing their ODL programs, courses, and materials for specific learner groups or the public at large” and to “help capacitate ODL teachers and practitioners through capacity building and professionalization programs.” UPOU is also expected to help establish ‘zonal ODL centers’ “one each in Metro Manila, Luzon, Visayas, and Mindanao, and eventually one in each region... which shall take charge of the training of teachers of ODL programs.”

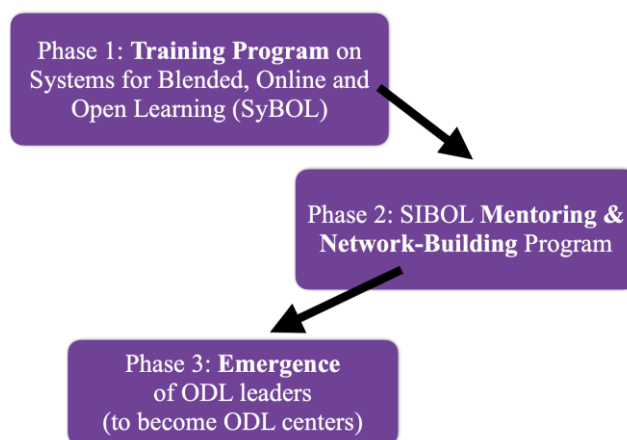
Guided by its mandate under RA 10650, the more recent *Guidelines on the Implementation of Flexible Learning*, and its institutional commitment to the promotion of what it now refers to as ‘open and distance e-learning’ (ODEL) — i.e. “forms of education provision that use contemporary technologies to enable varied combinations of synchronous and asynchronous communication among learners and educators who are physically separated from one another for part or all of the educational experience” (Alfonso, 2012, n.p.), including open learning, distance education, and blended learning — UPOU is implementing the Sustainable Institution Building for Open Learning (SIBOL) initiative. Through SIBOL, which is supported through the “Advancing Equity and Access to Higher Education through Open and Distance Learning” project co-funded by the ERASMUS+ Programme of the European Union, UPOU hopes to identify and build the capacity of potential ODL/ODEL zonal centers and cultivate a blended, online, and open learning (BOL) ecosystem in the Philippines.

This paper describes the SIBOL initiative and presents some insights from the pilot implementation of Phase 1 of the project, which commenced in March 2022. This first phase is a 14-week online training course for teams from HEIs that are intending to offer a blended learning program. The paper presents the results of the evaluation of the first two modules of the course based on the participants’ outputs and feedback, and the reflections of the training team.

2. An Approach to Supporting Institutions in Blended, Online, and Open Learning

SIBOL aims to provide participating HEIs with training and mentoring in planning, managing, and sustaining blended, online, and open learning (BOL) programs. It has three phases (see Figure 1):

Figure 1
SIBOL Program Design



This three-phase design aims to address two concerns: (1) institutional-level capacity development in BOL; and (2) sustainability in institutional development.

The focus on these two concerns comes from critical reflection on UPOU’s many years of experience in providing training programs in BOL. Various training modalities have been utilized, including face-to-face seminar-workshops, fully online courses, and blended training designs. Most of these are non-formal offerings or continuing professional development types of activities, but there is also a formal degree offering in the form of the Graduate Certificate in Distance Education and Master in Distance Education programs. There have also been a few institution-based engagements involving workshops customized for particular institutions, as well as massive open online courses with hundreds of teacher participants especially during the COVID-19 pandemic. However, on closer analysis, the focus of these training efforts has been on improving the individual practice of ODeL at the classroom or course level, rather than the components of program-level or institution-wide BOL implementation. Furthermore, they address only the first and most basic element of capacity building – i.e. training. Beyond training, which usually takes place prior to BOL adoption, practitioners and institutions need guidance and support during the process of BOL implementation.

Table 1 below shows the differences between the focus of training for individual BOL practitioners and training for BOL programs and institutions. Table 2 shows the SIBOL training curriculum – for Phase 1 of the program – which was drawn up based on the analysis shown in Table 1.

Table 1
Individual-focused vs. institution-focused BOL training

Topics/Foci	Individual practitioner level	Institutional level
Instructional design (ID)	Course design, learning activity design	Program design
Student support	Strategies for engaging, motivating, and communicating with students Synchronous and asynchronous learning strategies	Student support system (communication system, etc.) Student engagement framework
Developing self-directed and autonomous learning	Learning activity design	Independent learning programs (including support systems)
Assessment	Types of assessment in ODL	Examination systems System for recognition of prior learning
Instructional materials development	Selecting and curating learning resources Multimedia materials production for individual courses	Organizational setup for materials development Repositories Policy framework (e.g. on copyright, incentives, QA)
Educational technology	Digital tools and resources for teaching and learning	Learning management systems and platforms *Learning analytics Registration system Library system Information tracking systems
Building a learning community	Building a community of learners at the course level (e.g. community of inquiry or COI model)	Faculty development and support Building a community of practice (CoP) among faculty
Quality assurance (QA)	QA-ing your own course Course evaluation	Program-level and institutional-level QA (benchmarking, internal QA, external QA including accreditation) Program monitoring & evaluation

Table 2
SIBOL training curriculum

SIBOL Training Module	Essential Questions Covered
Module 1 - Planning Blended, Online, and Open Learning (BOL)	<ul style="list-style-type: none"> • Why do blended, online, or open learning (BOL)? What institutional goals and what needs and challenges are to be addressed through the adoption of BOL? What is your vision for teaching and learning? • What BOL strategy is appropriate and effective for your institution? • How can the strategy be adopted across the institution? What BOL systems and policies are needed?
Module 2 - Materials Development in BOL	<ul style="list-style-type: none"> • What course materials are needed in BOL and what are the options for BOL course materials development? • What is a BOL materials development system and what factors should be considered in building the system? • What policies should govern the use of blended learning materials within the institution?
Module 3 - Technology Management for BOL	<ul style="list-style-type: none"> • What are the current technologies being used in BOL? How do we select technologies for BOL? • What policies are needed to ensure safe use of technologies in BOL? • How do we roll out BOL technologies across the institution? What tech support and maintenance activities should be planned?
Module 4 - Faculty Development for BOL	<ul style="list-style-type: none"> • What BOL faculty development model would best suit your institution? • What policies should your institution adopt to promote effective and sustainable BOL practices? • How do you build a community of practice in BOL?
Module 5 - Learner Support for BOL	<ul style="list-style-type: none"> • What is an effective learner support system in BOL? What are the components of this system? • What factors should be considered in developing and implementing your institution's learner support system?
Module 6 - Quality Assurance for BOL	<ul style="list-style-type: none"> • Why is quality assurance in BOL necessary? What are the dimensions of quality in BOL? • What are the components of a QA system in BOL? What factors should be considered in setting up the system?
Module 7 - Sustaining BOL	<ul style="list-style-type: none"> • How is continuous innovation across the institution sustained?

To address the issue of sustainability — both in terms of sustaining effective BOL in institutions as well as sustaining support for institutions engaged in BOL — SIBOL goes beyond providing training (Phase 1) to mentoring institutional partners and building a network of institutions engaged in co-mentoring and sharing of resources for effective BOL (Phase 2). It is envisioned that from this network will emerge leaders in BOL who will train, mentor, and support other institutions in their respective regions (Phase 3). This will form the foundations of a BOL ecosystem in Philippine higher education that SIBOL aims to cultivate. Incidentally, *sibol* is a Filipino word that means “to sprout” or “to grow” (the word *tagsibol* means spring in English). The BOL ecosystem will be composed of teachers and learners, public and private colleges and universities, research organizations and regulatory agencies interacting as a community of BOL practitioners. As in a biological ecosystem where “not every node is linked to every other node; links may vary in strength and can impart positive, neutral, or negative effects... and... nodes grow and shrink over time; they can be lost, without the ecosystem as a whole necessarily failing” (Mars and Bronstein, 2017), this BOL ecosystem can evolve with varying levels of

interactions and types of collaboration among the different institutions comprising the network. There would be a contextualization of BOL frameworks and practices, diversity of approaches, and variations in types of interactions between institutions but the ecosystem as a whole would be balanced, organized, productive, and resilient — in short, sustainable.

3. Initial Results from SIBOL Phase 1

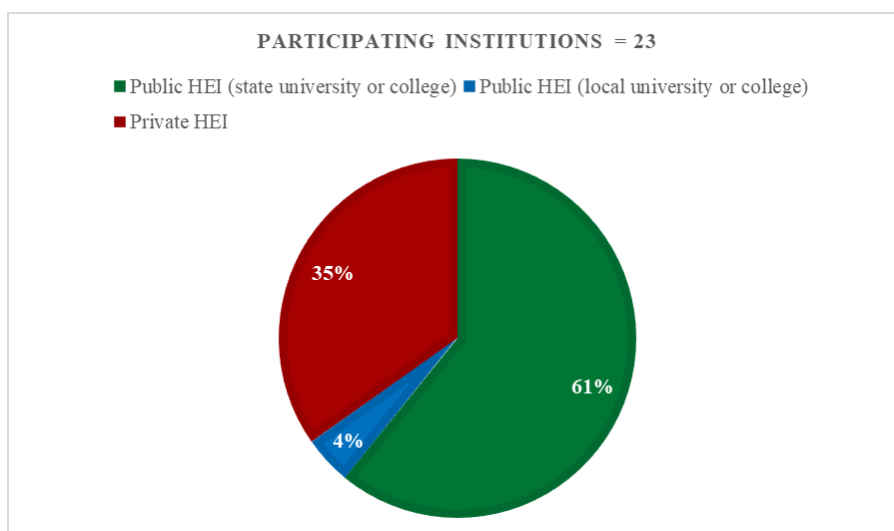
SIBOL Phase 1 is a 14-week online course on planning, managing, and sustaining a BOL (blended, online, or open learning) program. Focusing on policy frameworks and systems for an effective and sustainable BOL program, the course is composed of seven modules (see Table 2 above for the module topics) with each module taking two weeks. The mode of study combines independent and collaborative learning, as well as asynchronous and synchronous activities. The independent learning component, which is asynchronous, includes: viewing a short video lecture, taking an online quiz, studying core/required readings, and participating in an online discussion forum. The collaborative learning component includes working on a group assignment with team mates (i.e. colleagues from the same institution who are enrolled in the course) and then presenting this group assignment for discussion at a weekly synchronous online workshop with the teams from other institutions.

3.1 Training Participants

The pilot implementation of the course commenced on 14 March 2022 and it will run until 24 June 2022. The course participants were recruited via a formal invitation sent to the heads of Philippine HEIs in early February 2022. Each institution was invited to send a team of 4-7 faculty, staff, and/or administrators tasked with overseeing BOL planning, program implementation, and monitoring and evaluation in their institution. These individuals could be directors or coordinators of teaching and learning centers or distance education or e-learning centers, coordinators for instructional materials development, IT/LMS/VLE (Information Technology, Learning Management Systems, Virtual Learning Environment) administrators, coordinators of student support units or offices, and QA officers.

A total of 23 HEIs responded to the call for participants. More than half (61%) are publicly-funded HEIs – i.e. 14 state universities and colleges and 1 college funded by a local government unit – and the rest (35%; n=8) are private colleges and universities (see Figure 2).

Figure 2
Participating institutions by type



Majority (19 HEIs or 83%) of the participating institutions are based in Luzon, with most (five HEIs each) located in the National Capital Region (i.e. Metro Manila) and Region 4 (see Figure 3). There are only two institutions each for Visayas (composed of three regions) and Mindanao (composed of six regions).

Figure 3
Participating institutions by region



The total number of individual participants is 149 with participating institutions sending an average of seven representatives. About a fifth (32 participants or 21.47%) of the individual participants are Deans or Associate Deans. Academic program or unit directors, assistant directors, and chairpersons make up 16.78% (n = 25) and e-learning center coordinators and IT officers make up 6.7% (n = 10). There are three University presidents/chancellors and five vice presidents/vice chancellors. There are also four QA coordinators and 11 administrative support staff. The majority (59 individuals, equivalent to 39.59%) are listed simply as faculty members.

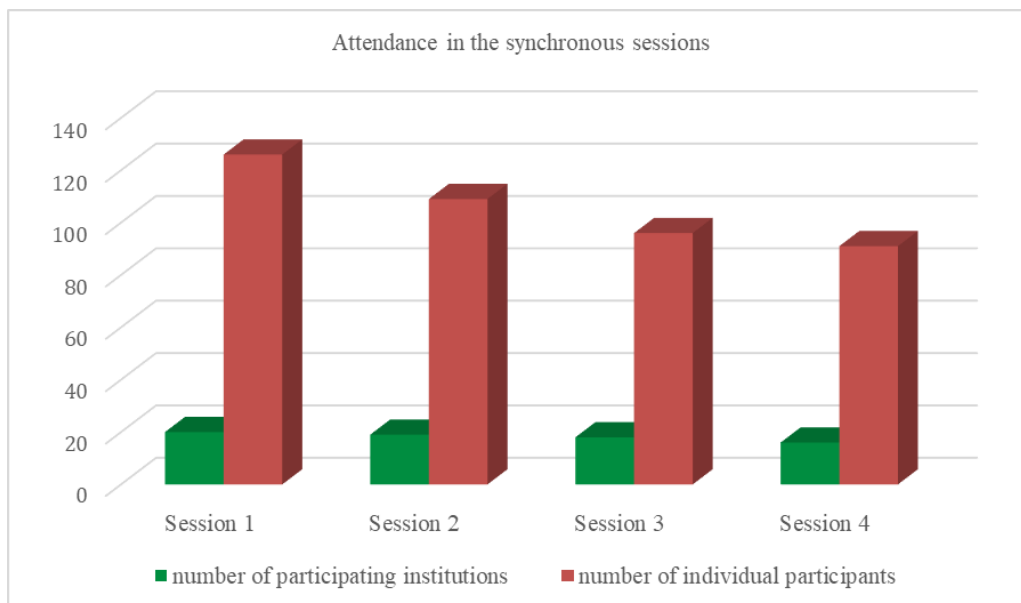
3.2 Level of engagement in the course

As of this writing, only the first two modules (Module 1 and Module 2) of the online course have been completed. The two modules covered four weeks, with four synchronous sessions (one per week). Presented here is an assessment of participant engagement in these two modules at the individual and institution levels.

Generally and not unexpectedly, there is a decreasing trend in the number of individual participants both in the asynchronous and synchronous module activities. From a high of 126 individual attendees (84.56% of the total) in the first synchronous session, the total individual attendees in the fourth session was 91 (61%). However, attendance in the synchronous sessions is not mandatory. The minimum requirement is attendance by at least one representative per institution who will share their team assignment output. From this perspective, the level of institutional participation is of greater interest.

As shown in Figure 4, the number of institutions attending the weekly synchronous sessions has remained consistent across the two modules, with 19-20 institutions (83-87% of the total) attending the two synchronous sessions for Module 1 and 16 institutions (78% and 70%, respectively) attending the two synchronous sessions for Module 2.

Figure 4
Attendance in the weekly synchronous sessions



Beyond attendance in the synchronous sessions, it is useful to consider the level of engagement with the course readings and asynchronous discussion forums from which the participants are expected to derive key concepts and principles that will guide their planning of specific components of their proposed BOL program. For this assessment, we examined activity logs on the Moodle-based learning management system and conducted a module evaluation survey among the participants.

Figure 5
Number of views and posts by students

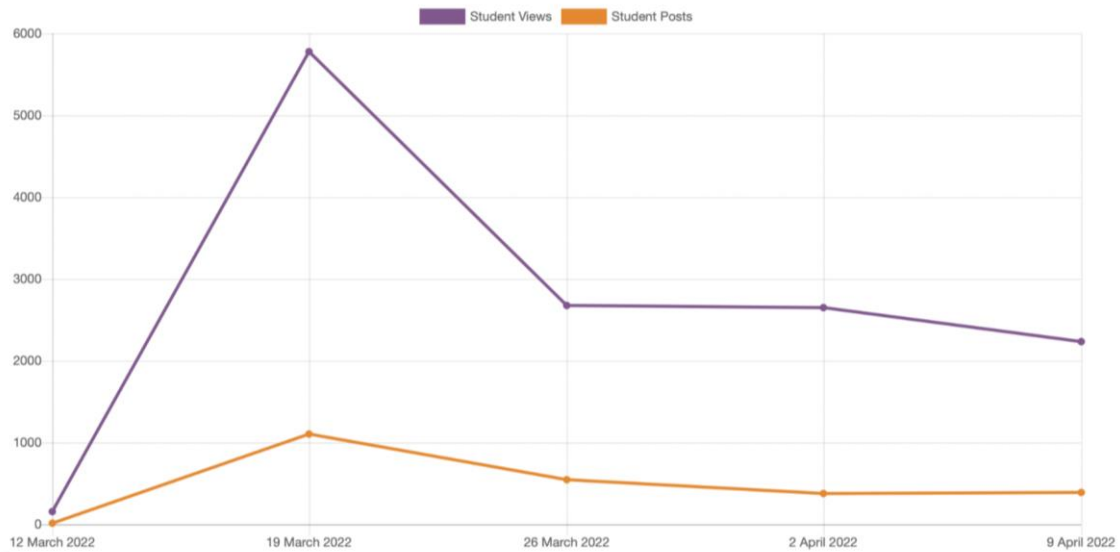


Figure 5 confirms the downward trend in the number of individual participants mentioned previously. With regard to rate of participation in specific learning activities, significantly fewer participants join the discussion forums (ranging from a high of 40 in Forum 1 and a low of 13 in Forum 4, or an average of 27 participants per forum) compared to the number of participants who take the self-assessment quizzes (103 in Quiz 1, 88 in Quiz 2, and 71 in Quiz 3).

At the end of each module, the participants were asked to answer an online module evaluation where they indicated their level of agreement (using a scale of 1-5 with 1 indicating strong disagreement and 5 indicating strong agreement) with 12 statements about the module topics and subtopics, readings, video lectures, discussion forums, group assignment, and synchronous sessions. The survey also includes three open-ended questions about which aspects of the module worked best and why, what improvements can be made to the module, and how much time the participant spent on the module.

The responses to the 12 statements (ranging from a score of 4.3 to 4.6) show a positive evaluation of the course components by the majority of 41 and 39 survey respondents for Modules 1 and 2, respectively. The scores are confirmed by the responses to the open-ended question on what aspects of the module worked best and why, which for both modules were the following:

- Module resources (i.e. video lectures, core/required readings, PowerPoint presentations uploaded in the course site, case studies) (mentioned by 24 and 18 survey respondents for Modules 1 and 2, respectively)
- Synchronous sessions (mentioned by 12 and 9 respondents for Modules 1 and 2, respectively)
- Group assignment (mentioned by 9 and 4 respondents for Modules 1 and 2, respectively)
- Sharing of reflections/experiences (mentioned by 4 respondents for Modules 1 and 2)

But in terms of course design, perhaps more instructive than the responses to what worked best are the suggestions for improvement given by the survey participants. While more than half of the survey respondents said they had no suggestions for improving the first two modules, some respondents indicated the following:

- Give participants more time to complete the learning tasks by making the module available earlier
- Annotate all readings
- Provide more video materials
- Discuss the relevant concepts, principles, or theories during the synchronous session

With regard to the time needed for the learning tasks, the course team estimated that each module would require about 4 hours per week for the asynchronous component and 3 hours per week for the synchronous component. However, 34.4% of the survey respondents said that they spent only 1-2 hours per week on Modules 1 and 2. This number does not account for the 3-hour synchronous session, which could mean that the respondents were referring only to the asynchronous component when they responded to the question. A slightly

smaller percentage (31.7% for Module 1 and 34% for Module 2) said they spent 4-5 hours per week on the module, and it is also not clear whether the duration of the synchronous session is included in this estimation. But there were also some respondents who said they spent between 6 to 12 hours per week on each of the two modules. In hindsight, it would have been more useful to ask how much time the participants spend on key learning activities, including the group work they need to do on the assignments, which require them to think through and apply the concepts and principles discussed in the readings in assessing their institutional needs, systems, and policies.

3.3 Institutional engagement with BOL

This section of the paper presents part of what we have learned about how institutions are approaching BOL planning and implementation based on the group assignments submitted. There were two assignments for Module 1 (Assignments 1 and 2) and two assignments for Module 2 (Assignments 3 and 4). For each assignment, the participants in each institution were asked to work together in responding to questions concerning their institution's rationale for implementing BOL, the particular BOL program that they planned to offer, their assessment of existing policies and systems related to BOL implementation, and their recommendations for improving these policies and systems especially with regard to materials development, the focus of Module 2.

Based on their responses to Assignment 1, which asks them to think about adopting BOL for a specific academic program, most of the participating teams recognize that BOL can help their institution to: reach more students, including those in other areas/ regions/ countries; ensure resilience (continuity of learning, continuity of operations) during periods of disruption; introduce innovations in teaching and learning; address physical space limitations; decrease operational costs; and enhance the institution's reputation. They also recognize the following benefits for students: promoting digital literacy, fostering active learning, flexibility, and developing lifelong learning skills. The alignment of BOL with institutional thrusts was mentioned. But the institutions need guidance in articulating more concretely how BOL can help them meet their institutional goals and how BOL can be a more effective way of achieving program goals and target learning outcomes. This articulation is important for getting stakeholder buy-in and, more importantly, for a more strategic engagement with BOL which, unlike instituting traditional programs, requires not only (additional) resources but also a change in how to think about and deploy those resources.

For Assignment 2 the participating teams were asked to do a quick assessment of their institution's systems and policies in five dimensions – materials development, technology management, faculty development, learner support, and quality assurance. These dimensions are adapted from Lim, Wang & Graham's (2019) framework for supporting institutional strategic planning of blended learning. Most of the participating teams indicated that they have institutional policies on learning materials development but also that this is the least developed dimension of BOL in their institution. Materials development became a particularly salient aspect of learning delivery during the pandemic when all institutions had to shift to remote learning. But the abruptness of the shift brought up many aspects of materials development that institutions must come to grips with in order to ensure effective teaching and learning.

The readings (analyses, case studies, and examples of institutional policies on materials development) and two assignments in Module 2 provided an opportunity for the participating teams to reflect further on issues and concerns around materials development for BOL in their respective institutions. The issues and concerns mentioned (see Appendix Table 1) can be classified under two themes: (1) insufficient resources for materials selection and development; (2) quality and ownership of course materials. These themes include intellectual property rights and ownership, incentives for materials development, and the faculty's motivations and attitudes towards materials design and development, which were all cited as major concerns.

Most of the challenges identified are consistent with the literature (cf. Care & Scanlan, 2011; Choppin & Borys, 2017; Cox & Trotter, 2016; Rice & Otiz, 2021; Risquez, McAvinia, Desmond, Bruen, Ryan, & Coughlan, 2020; van den Bogaart, Drijvers, & Tolboom 2019; Walz, 2018), but the institutions' experiences and realities vary. For example, while negative attitudes of faculty towards multimedia course materials development and collaboration with peers were noted, three teams said that in their institutions the willingness of their faculty to work together and explore use and design of various materials are aspects that work well. Also, addressing intellectual property and ownership concerns was cited as a challenge by many but three participating teams reported that they already have policies and guidelines in place and their focus is on ensuring that all stakeholders are informed and discussions remain open.

4. Concluding Note

SIBOL is in a very early stage of implementation. Only two modules of the seven modules comprising Phase 1 of SIBOL have been implemented as of mid-April 2022. The remaining five modules will be delivered over the next 10 weeks. And then will come Phase 2 of SIBOL where it is envisioned that the participating institutions will implement the BOL programs they have planned in Phase 1 and engage in mentoring and co-mentoring and sharing of resources with other participating institutions in the network.

But findings from Modules 1 and 2 of the training phase of SIBOL shows that planning for BOL is a highly complex process even where institutions have some experience of implementing BOL and they are willing to institutionalize BOL. At this point in the program, many participants still see BOL from the context of “the pandemic,” which has implications for how they view BOL as a long-term strategic goal beyond this public health crisis. More importantly, the issues and concerns identified by the participants thus far show that beyond formulating clear policies and establishing systems, BOL requires a collective rethinking of institutional thrusts and critical reflection on institutional culture and values and how these can inform as well as undermine the BOL strategy. The organizational and systems issues associated with adopting a new instructional “model” is fraught with “daunting difficulties like change management,” as one participant put it. This is the more challenging aspect of institution building because it requires a long-term commitment to building trust among members of the institution before transformational outcomes (Lammert, Johnson & Fiore, 2015; Thurab-Nkhosi, 2018) can be achieved.

For us in the SIBOL team these insights into the nature and dynamic of institutional change demands that we continue to reflect on and refine our approach to capacity building. For the training phase possible adjustments include providing more institution-focused feedback and demonstrating how institutions can begin to engage in collegial discussions as they transition to or enhance their BOL strategy.

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Appendix Table 1*Challenges in materials development for BOL*

Themes	Sample from the submissions
1. Insufficient resources for selection and development	
a. Availability and accessibility of quality learning resources	access to resources due to limitations; limited access to updated references; limited access to online learning materials and platforms; unavailability of electronic version of locally published books
b. Cost of resources (learning materials, instructional materials or IMs)	cost of books; cost considerations for [the] development of new materials using multimedia; Library materials used for references are insufficient, if not, outdated, and many of these are expensive.
c. Faculty-related resources	
<ul style="list-style-type: none"> ● Time as a resource 	not enough time frame; time management (from preparation to end product, for example for copyrighted modules)
<ul style="list-style-type: none"> ● Faculty knowledge and skills 	Not all teachers have the eye and/or are skilled to create their own course materials properly/ effectively; lack of skills in developing multimedia materials; not all faculty are capable of IMs development (for blended)
<ul style="list-style-type: none"> ● Attitudes and behaviour of the faculty/ teachers 	limited motivation among faculty members; motivation for developing IMs [instructional materials]; Not all teachers embrace the idea of utilizing or maximizing technology to develop course materials; lack dedication or passion (interest) to produce comprehensive and quality learning materials
<ul style="list-style-type: none"> ● Faculty workload 	faculty workload (overloaded); faculty overloaded designations and functions; workload (also appropriate resources and support) of teachers
d. Established units for production of learning materials	limited/lack of multimedia experts; need for a development team (SME, reviewer, ID, language editor, etc.); absence of Committee/Office in-charge of materials development
2. Quality and ownership of materials	
a. Quality of learning materials	
<ul style="list-style-type: none"> ● Addressing learners' needs 	disciplinary, program, and course differences in teaching strategies and student needs; designing and redesigning lesson plan/strategies to accommodate differences in learner needs
<ul style="list-style-type: none"> ● Alignment with intended learning outcomes 	Non-conformity of the learning assessment and materials to the learning objectives/ outcomes

<ul style="list-style-type: none"> • Evaluation and review scheme for quality 	<p>quality assurance concern; absence of institutional standards in making quality learning materials; insufficient criteria for evaluation; evaluating the effectiveness of the course materials in facilitating learning; proving the quality and effectiveness of the materials</p>
<p>b. Intellectual property rights and ownership</p>	<p>ownership is not clear and compensation/remuneration; culture of “sharing” concern</p>