

Cover Sheet for Proposals (All sections must be completed)	JISC Capital Programme	
Name of Capital Programme: e-Learning Programme		
Name of Lead Institution: Newcastle University		
Name of Proposed Project: North east regional collaboration around ePortfolio progression pathways with illustrative case studies – EPICS2		
Name of Project Partners: HE: University of Durham; Northumbria University; University of Sunderland; University of Teesside. FE: OWL (via City of Sunderland College/Tyne Metropolitan College); G6 (Tyne and Wear). Regional Stakeholders: Unis4NE, NorMAN, JISC Regional Support Centre Northern (RSC Northern), ASPIRE, CETL4HealthNE.		
Full Contact Details for Primary Contact: Name: Paul Hopkins Position: Director, ISS Email: paul.hopkins@ncl.ac.uk Address: Newcastle University, Newcastle upon Tyne, NE1 7RU Tel No: 0191 222 8040 or 0191 222 8045 Fax No: 0191 222 8765		
Length of Project: 2 Years		
Project Start and End Dates: 2nd January 2007 to 23rd December 2008		
Total Funding Requested from JISC: £202,417		
Funding Broken Down over Project Years: Year 1: £105,693 Year 2:£105,625		
Total Institutional Contributions: £104,506		
Outline Project Description: <p>EPICS2 will build upon the considerable success of the initial EPICS project which has helped develop a strong regional collaboration in the North East around technology, pedagogy and governance of ePortfolios and PDP. This proposal aims to embed outcomes from the initial project by running large-scale studies of ePortfolios to support employability, PDP, assessment and the transfer of portfolio data to support life-long learning. It will also provide continued support for the regional forum which has developed a community of pedagogic practice around PDP and governance, including use of the 'toolkit' developed in EPICS in relation to ePortfolios.</p> <p>The technical infrastructure established in EPICS, including work on shared authentication and single-sign-on, will be maintained and developed to support the case studies. There will also be a small amount of technical development to support the personalised learning agenda. There will also be a requirement for evaluation of the case studies and overall project; plus dissemination, including a national event.</p>		
I have read the Circular and associated Terms and Conditions of Grant at Appendix B (Tick Box)	YES	NO

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Length of Project: 2 Years		
Project Start and End Dates: 2nd January 2007 to 23rd December 2008		
Total Funding Requested from JISC: £209,000		
Funding Broken Down over Project Years: Year 1: £110,550 Year 2: £113,496		
Total Institutional Contributions: £199,919		
Outline Project Description: <p>EPICS2 will build upon the considerable success of the initial EPICS project which has helped develop a strong regional collaboration in the North East around technology, pedagogy and governance of ePortfolios and PDP. This proposal aims to embed outcomes from the initial project by running large-scale studies of ePortfolios to support employability, PDP, assessment and the transfer of portfolio data to support life-long learning. It will also provide continued support for the regional forum which has developed a community of pedagogic practice around PDP and governance, including use of the 'toolkit' developed in EPICS in relation to ePortfolios.</p> <p>The technical infrastructure established in EPICS, including work on shared authentication and single-sign-on, will be maintained and developed to support the case studies. There will also be a small amount of technical development to support the personalised learning agenda. There will also be a requirement for evaluation of the case studies and overall project; plus dissemination, including a national event.</p>		
I have read the Circular and associated Terms and Conditions of Grant at Appendix B (Tick Box)	YES	NO

JISC Circular 03/06 (Annex C): North east regional collaboration around ePortfolio progression pathways with illustrative case studies part 2 (EPICS2)

Project Outline

EPICS2 seeks to build on the considerable success of EPICS¹ which achieved a “scalable and sustainable regional pilot project building on local excellent practice in personal development planning (PDP) and ePortfolios to support learners at all levels of post-16 education” in the North East of England (NE) through delivering it’s primary objective of “Establish[ing] a regional collaboration pilot project pledged to deliver a critical level of uptake of connected services” as part of the JISC 07/04 Distributed eLearning Programme. This proposal, based on an established partnership of all HE organisations and two FE consortia in the NE, represents a substantial increase in the impact of work done in DEL Tools for Distributed eLearning and Regional Distributed eLearning, plus new FE/schools and employers partners, and extensive new pedagogic, technological and assessment-related developments.

The seven partners (Universities of Durham, Newcastle, Northumbria, Sunderland and Teesside²; the OWL Consortium³ represented by City of Sunderland College and Tyne Metropolitan College; delivered and far exceeded, after some initial challenges relating to the number of partners and diversity of technological and pedagogic practice, all aspects of the original proposal. In particular, EPICS established an excellent working relationship between these and associated organisations around the technology, pedagogy and governance issues associated with putting the interests of individual learners at the heart of sharing lifelong learning records (PDP and ePortfolios). In addition, the partners conducted a comprehensive review of the success factors (and risks) influencing the delivery of the project. The remaining activity (national event) is being planned for the new academic year 06-07, in partnership with the Centre for Recording Achievement⁴, other DeL Regional Pilots⁵ and the Higher Education Academy⁶. It is a testament to the goodwill and progress made in EPICS that all original partners wish to continue to collaborate in a further phase, and that FE partners (new to EPICS) wish to join and adopt/implement the processes piloted.

EPICS was a complex and ambitious 12 month project, with innovation and risk at the centre of a strong local desire to collaborate for the benefit of the many students who choose to study in FE or HE in the NE region. It demonstrated comprehensively the breadth of stakeholder and institutional engagement needed to support the delivery of high quality PDP and ePortfolios (curriculum managers, teaching staff, registrars/quality enhancement, staff development, computer and network services, faculty administrators, legal services, etc.). EPICS was underpinned by the JISC DeL Tools for eLearning project ePET⁷, local virtual learning environment (VLE) expertise/innovations based on open source software⁸ and commercial VLEs such as Blackboard⁹, and the JISC Core Middleware IAMSECT (01/04) and SAPIR (11/04) projects¹⁰. In turn, EPICS now underpins an aspect of the delivery of a collaborative infrastructure to support other major subject-based regional partnerships such as three regional¹¹ and one institutional¹² centres for excellence in teaching and learning (CETL), and Science City.

EPICS2 operates horizontally at an infrastructure level across institutional services, such as computing and quality enhancement, and vertically into subject-based teaching and learning (from where the early adopters are influencing outwards). It provides a forum for *services and subjects* to reciprocally share and influence practice and to network, and an understanding of the technology, pedagogy and governance tools for supporting subject-related educational innovation. The funding requested here (£209,000) for a 2-year project from Oct 2006 is, therefore, out-of-scope for other service or subject-based funded activity, offers significant opportunity for ‘adding value’ to activity elsewhere, and enables long term embedding beyond the end of the project funding.

Mainstreaming the outcomes of the pilot over the next two years, consolidating uptake in the partner sites (wider range of subjects), expanding the partnership (more FE partners) and engaging more with compulsory education (e.g. through ASPIRE¹³) and employers will increase EPICS2’ potential to influence local/regional policy development and life long learning. Further investigation of the use of PDP/ ePortfolios and the collaboration to support assessment (eAssessment) and sharing learning resources will be investigated in this new phase of work.

¹ EPICS <http://www.epics.ac.uk>

² Except the OU which is a partner in the CETLs cited later in this proposal therefore it is planned to liaise more with the OU

³ OWL is a collaborative e-learning project involving the colleges (‘G6’) and 3 universities of Tyne and Wear <http://www.owl-elearning.ac.uk>

⁴ Centre for Recording Achievement <http://www.recordingachievement.ac.uk>

⁵ MANSLE, RIPPLL

⁶ Higher Education Academy <http://www.heacademy.ac.uk>

⁷ PDP/ e-Portfolio website <http://www.eportfolio.ac.uk>

⁸ TLTP3-86 NLE <http://nle.ncl.ac.uk>

⁹ Blackboard <http://www.blackboard.com>

¹⁰ IAMSECT <http://iamsect.ncl.ac.uk> and SAPIR <http://sapis.ncl.ac.uk>

¹¹ CETL4HealthNE – led by Newcastle University on behalf of Universities of Durham, Northumbria, Sunderland, Teesside, OU (NE), SHA and NHS Trusts (<http://www.cetl4healthne.ac.uk>); Active Learning in Computing (ALiC) – led by University of Durham and involving Newcastle University (<http://www.dur.ac.uk/alic/>); International Centre for Music Studies – led by Newcastle University on behalf of the Universities of Durham, Northumbria, Sunderland, Teesside and the Open University

¹² Centre for Excellence in Teaching & Learning in Assessment for Learning – Northumbria University (http://www.northumbria.ac.uk/cetl_afi/)

¹³ ASPIRE <http://www.aspiretoday.co.uk>

Project Duration

If funded the project will commence on 1 October 2006 and run until the end of September 2008. For a more specific project timeline see the estimated start and end times for each workpackage below.

Contribution to eLearning Programme and Beyond

EPICS2 includes significant deliverables in terms of technology, pedagogy and governance which will be disseminated to the wider JISC community. The substantial case-studies and associated evaluation data will be of broad applicability to the PDP/ePortfolio community. The technical and pedagogic developments will respect the diversity and integrity of local institutional PDP and portfolio requirements will be documented and available. The potential impact is much wider, by making the technical framework and open source tools demonstrably accessible and usable through the use of illustrative case studies to a wide range of organisations within the JISC community, starting with the project's extended partners in HE and FE and including compulsory education (ASPIRE) employees. The technical developments, including extensions to ePET to facilitate personalisation of learning, will be made available to existing community using the ePortfolio as well as new potential users.

Project Description

This proposal aims to embed outcomes from the initial project by running large-scale studies of ePortfolios to support employability, PDP, assessment and the transfer of portfolio data to support life-long learning. It will also provide continued support for the regional forum which has developed a community of pedagogic practice around PDP and governance, including use of the 'toolkit' developed in EPICS in relation to ePortfolios.

The technical infrastructure established in EPICS, including work on shared authentication and single-sign-on, will be maintained and developed to support the case studies. There will also be a small amount of technical development to support the personalised learning agenda. There will also be a requirement for evaluation of the case studies and overall project; plus dissemination, including a national event.

Aims and objectives

Within these broad regional aims the project team has identified the following specific objectives listed against the aims they support.

1. **Extending partnership and collaboration:** embedding EPICS deliverables, and fostering continued *services* and *subject collaboration* to support the uptake of PDP/ePortfolios across the region by:
 - recruiting further subject areas in each of the existing partner sites
 - recruiting new FE partners as possible and appropriate (rate dependent on their priorities, affiliations, pedagogies, processes and technologies);
 - identifying and approaching new partners beyond the predominantly HE/FE catchment of the EPICS consortium (e.g. compulsory education, employer groups and SMEs);
 - promoting an increased regional understanding of the governance and legal issues, particularly data protection
 - creating federations of organisations with requirements for defensible large scale transfer of data
2. **Supporting a pedagogic approach:** increasing the scope of EPICS to investigate the use of PDP and ePortfolios in a wider range of educational scenarios:
 - agreeing and defining a typology of ePortfolio and PDP for FE and HE
 - developing frameworks appropriate to these typologies through an expanded Regional Forum including learners, employers and compulsory education as well as FE and HE
 - identifying and resolving any technical problems associated with these typologies and frameworks
 - using these typologies and structures to engage with stakeholders and inform the regional expansion and development of the programme
 - investigating the use of PDP/ePortfolios as a significant part of the assessment process
 - investigating the use of PDP/ePortfolios to share curriculum content and learning resources
3. **Refining the ePortfolio technology:** building on the existing work and regional infrastructures to support the pedagogic purpose of the project
 - continuing to deliver the core technical infrastructure required to support the consortium partners, including identity management, authentication/authorisation mechanisms established in the EPICS and IAMSECT projects
 - providing means of personalizing and socializing the ePortfolio experience for the learner
 - examining the benefits of decoupling the ePortfolio from the desktop using mobile devices and leveraging existing work undertaken by Newcastle dental ePortfolio projects and in regional CETL projects
 - engaging with emerging specifications and standards to facilitate the robust and efficient flow of ePortfolio and PDP data between institutions
4. **Evaluating the impact of the project:** evaluating the impact of ePortfolios and PDP in the region:

- evaluating the impact of the project with new partners
- evaluating the efficacy of ePortfolios in the new pedagogic areas (assessment and resource sharing)
- demonstrating the long term sustainability of the outcomes of EPICS2 by comprehensively evaluating and documenting 'impact', compared with the 2004/5 baseline documented in EPICS

5. Amplifying the impact of the project: documenting and disseminating the outcomes of the project and its evaluation and engaging with other high impact projects within the region:

- developing a detailed dissemination strategy (in conjunction with other funded projects and the JISC) which will include workshops with the partner sites (embedding), and wider audiences (understanding/awareness) within and beyond the region
- adding value to institutional and other projects (including CETLs) in the region by ensuring that this project complements existing institutional requirements
- impacting on large numbers of students (at least 9000 in the NE region by March 2009) via other projects or development activity such as those provided by local CETLs.

Project Deliverables

1. Review of project plan and consultation with stakeholders

Drawing on experience from the EPICS project we recognise the importance of reviewing the project plan and engaging in wider consultation with stakeholders early in the project. This is particularly important in the EPICS consortium as it includes a relatively large number of partners.

The review and consultation process will serve 5 main purposes;

- to refine the plan agreed with the existing stakeholders;
- to engage with potential new partners and other stakeholders within the region;
- to refine existing and identify other potential case studies and,
- to ensure alignment of technology, pedagogy, governance and evaluation
- complete the preparation of the final detailed project plan in accordance with JISC requirements.

2. Regional Forums

The establishing of a regional forum has been a major outcome of the regional pilot project. The forum has drawn together representatives from the partner institutions interested in PDP and portfolio learning. As a community of practice the Forum provides a space to share good practice and develop new ideas and approaches.

3. Regional Portfolio Services

Servers to be maintained by Newcastle will be used to support some of the planned case studies. They would be updated with the latest version of ePET and support services such as Shibboleth authentication and authorization and will provide support for other potential case studies involving ePET that might arise from the consultation stage of the project.

4. Personalisation of learning

ePET has a flexible architecture which supports a range of pedagogical requirements and has a high level of customisation at the course/programme level¹⁴. Here we will build on the existing architecture of ePET and will extend the high level of customisation to the individual learner level in line with current policies on the personalisation of learning. Specifically this will include:

- more learner control over structure
- learner created web pages
- more control over look and feel (for self + shared views)
- add personal learning outcomes to fixed programme outcomes
- add support for accessibility profiles (IMS Learner Information Package Accessibility for LIP)
- Further develop the 'community' area as a social learning space including semi-structured areas to provide framework for blogs (using the ATOM¹⁵ API) and resource sharing.

Although this work will provide a significant increase in functionality, due to the nature of the ePET system, this actually represents a relatively modest amount of new development work that would be in place for the start of the academic year for the applicable case studies.

¹⁴ Cotterill SJ, Horner P, Hammond GR, McDonald AM, Drummond P, Teasdale D, Aiton J, Orr G, Bradley PM, Jowett T, Heseltine L, Ingraham B, Scougall K. Implementing ePortfolios: adapting technology to suit pedagogy and not vice versa ! Proc e Portfolios 2005, EIFEL

¹⁵ ATOM <http://www.atomenabled.org/>

5. Case studies

These will involve cohorts of students using ePortfolios for a full academic year. These large-scale studies will build on work from the EPICS project and other projects and should produce findings that are applicable beyond the specific subject domains. The scope and number of case studies may be broadened in light of the consultation stage and ongoing pedagogic discussions during the project.

CS1: Case Study 1 – Postgraduate Students (WP2, WP3)

The portfolio will be available for the full cohort of undergraduate science students and will be evaluated for the full academic year. There will be support for life-long learning through the following methods:

- For students who enter postgraduate courses at Newcastle University (> 500) Processes will be developed to transfer undergraduate portfolio data into the institutional Postgraduate Research Training ePortfolio. This will utilise technologies for data transfer developed in the earlier EPICS and ePET projects.
- There will be investigative work to see how portfolio data might be transferred for students who enter postgraduate courses at other HEIs in the region (> 2,000). In particular, this will build on the novel work in the EPICS project for transferring granular-structured data from ePET into aggregated-unstructured files into the Blackboard CMS.
- The project will consult with the North East Collaboration Group for Researcher Development, whose terms of reference include the provision of regional postgraduate and postdoctoral training opportunities and the opening up of in-house training to researchers from the other regional universities. The project will investigate technology solutions for integrating booking and recording systems to facilitate regional access to training workshops..

CS2: Case Study 2 – PDP and employability (WP3)

The project team will identify appropriate cohorts of students in all partner institutions engaged in using ePortfolios in the context of PDP (arising from the ePortfolio pilots currently taking place in each of the academic schools at Teesside and across the institution at Newcastle). The use of PDP to promote reflective learning, and user-satisfaction (staff and student) will be evaluated during the academic year 2007-8. Portfolios will also be used to support employability and this case study will include at least one cohort of undergraduate students.

CS3: Case Study 3 – Assessment (WP3)

The use of PDP/ePortfolios in formative and summative assessment/alongside assessable academic study will be investigated (literature search, mapping of current practice within and outwith the region) and experiences shared via the Regional Forums, with a view to implementing best practice in the use of PDP/ePortfolios in assessment.

CS4: Case Study 4 – ePortfolio Transfer – the Foundation Degree (FD) Connection (WP2)

The use of PDP/ePortfolios to support students on Foundation Degrees will be investigated. Since FD includes a formal expectation of movement of students between FE and HE institutions, it is likely that this may also lead to a need to transfer ePortfolio (especially PDP) data between institutions. Data will then be gathered on the use and user-satisfaction (staff and student) during the academic year 2007-8 for further evaluation.

CS5: Case Study 5 – Importing UCAS Data (WP4)

Work will be undertaken to import UCAS data and populate a variety of portfolio systems used within the project directly from UCAS using UCAS-link¹⁶ to electronically transfer information into IMS-LIP/UK-LEAP formats, specifically using the web-link and xml-link products. This will be investigated with a selection of students.

CS6: Case Study 6 – Identity Management and Exporting ePET Data (WP4)

The ePET portfolio will be updated, made Shibboleth-aware and its role will be extended to have more emphasis on careers and transferable skills. Drawing on experience associated with the JISC IAMSECT project, the authentication method used with this ePET system will be switched to CAS¹⁷. This will allow enhanced authentication and authorization options, such as cascading authentication schemes which should assist the system with integration into other institutions authentication environments (such as Newcastle University's central Active Directory) and will provide the potential to link in with Shibboleth single-sign-on systems. A facility will be created for students to export their portfolios as an XML file (drawing on technologies used and developed in the EPICS project) in either IMS-LIP and/or UK LEAP formats as appropriate.

Project plan and timetable

The project plan is described below in terms of 7 broad work packages together with indications of the implementation timetable and milestones along with the deliverables which will be addressed by each work package.

¹⁶ UCAS-link <http://secureucas.com/higher/ucaslink/index.html>

¹⁷ CAS <http://www.ja-sig.org/products/cas/>

Work Packages

WP1: Setup and management

Leads: Tony McDonald, Liz Smith and Paul Horner (Newcastle)

- reuse and build on the excellent infrastructure (such as grouphub and the PDP forum) from the EPICS project
- in consultation with partners, establish terms of reference for the collaboration and a timetable for meetings
- in consultation with partners, determine detailed project planning, staffing, advisory, and reporting structures

Deliverables: project plan

WP2: Partnership and collaboration:

Lead: Bruce Ingraham (Teesside)

Mainstream/embed the deliverables of the regional pilot, and foster continued *services and subject* collaboration to support the uptake of PDP/ePortfolios:

- to encompass a wider range of subject areas in each of the existing partner
- new FE partners, as possible and appropriate (rate dependent on their priorities, affiliations, pedagogies, processes and technologies)
- new partners out with the immediate catchments of EPICS (compulsory education and employer groups).
- using the governance and other tools developed by the EPICS project to insure institutional readiness appropriate collaboration agreements and other plans will be put in place for the conduct of the case studies.

Deliverables: refinement and deployment of the ePortfolio toolkit, case studies; **CS1** (*Postgraduate students*) and **CS4** (*ePortfolio transfer – the Foundation Degree Connection*)

WP3: Supporting a Pedagogic Approach:

Leads: Jamie Thompson (Northumbria)

The work identified in this work package continues to complement the main thrust of the EPICS2 project by locating that work in the context of both the pragmatics of regional practice, cooperation and difference and an ongoing debate about the pedagogy of PDP and ePortfolio. In particular the attempt to identify a range of commonly agreed portfolio templates for evaluation will enable the project to begin to analyse any potential gap between piloting and mainstream practice.

The Regional Forum will;

- reconvene as a representative group of HE and FE in the North East and from the outset will identify a process to include a student voice and an employer voice.
- identify a process to involve and include a wider range of staff from the partners in its work.
- exchange and share a range of portfolio templates and subsequently hold three workshops to identify, adapt and design (at least) three templates that are fit for purpose (e.g. as mirror, map and sonnet) across all institutions.
- facilitate and support the piloting, transference and evaluation of these templates.
- convene a regional symposium to disseminate the results of this work.

Deliverables: Regional Forums, case studies; **CS1** (*Postgraduate students*), **CS2** (*PDP*), **CS3** (*Assessment*)

WP4: Implementing and supporting the technology:

Leads: Simon Cotterill, Paul Horner, Newcastle

- Continue to deliver technical infrastructure to existing and new partners¹⁸
- Continue to support the existing regional pilot services
- customised and personalised ePortfolios
 - provision of ePortfolio content on mobile devices
 - enhanced web-service enabled ePortfolio systems using REST¹⁹-ian techniques and ATOM protocols
- build upon existing JISC recommendations for identity management, e.g. Shibboleth authentication and authorisation
- build upon existing transfer technologies from the regional pilot project
- provide levels of accessibility provided by AC-LIP and other specifications/standards
- transfer UCAS data to ePortfolio PDP and transcripts

Deliverables: maintainable and scaleable servers and services, identity management procedures and protocols, ePortfolio web services, transferable ePortfolios, case studies; **CS5** (*Importing UCAS data*), **CS6** (*Identity management and exporting ePET data*), **CS7** (*Personalisation of Learning in ePET*)

¹⁸ maintenance of existing services is institutional contribution; some activities will be in relation to regional CETL and other developments

¹⁹ Representational State Transfer <http://en.wikipedia.org/wiki/REST>

WP5: Governance and legal

Lead: Rob Wilson (Newcastle)

Following on from the work carried out under the EPICs project and continuation which developed the Governance toolkit and has begun to support its application in a number of contexts. The work of this workpackage will be to follow-up and widening on the application of the toolkit within the NE region and beyond; horizon scanning and iterations based on the current rapid developments surrounding e-portfolio and PDP where appropriate and seeking to mainstream the development and training/dissemination of the toolkit in an appropriate existing national or regional vehicle (e.g. CRA, BECTA and/or Netskills). The proposals for the mainstreaming will be informed through discussion within the regional partnership group.

Deliverables: Updated version of the EPICs Governance Toolkit and Proposal for sustainable support and development

WP6: Evaluation:

Leads: Sue Gill (Newcastle), David Baume (external evaluator)

- produce an evaluation plan in consultation with the partners and External Evaluator. This will inform the other WPs/case studies.
- capture feedback for formative purposes during the course of the project
- capture both formal and informal feedback for summative evaluation of the project
- demonstrate the long term sustainability of the outcomes of EPICS2 by comprehensively evaluating and documenting 'impact', compared with the baseline situation (documented in EPICS);
- add value to institutional and other projects (including CETLs) in the region which include ePortfolio/PDP elements. This will broaden the impact of EPICS2 within the region.
- As well as a formal evaluation report results of the project will also be disseminated as part of WP6

Deliverables: evaluation plan, evaluation report

WP7: Dissemination and documentation:

Leads: Simon Cotterill (Newcastle)

- Develop detailed dissemination strategy (in conjunction with other funded projects and the JISC).
- Will include: workshops with the partner sites (embedding) and wider audiences (understanding/awareness) within and outside the region; focus groups; documentation which will be presented in a 'handbook' of good practice, solutions, and a series of case studies (based on the use cases outlined above)
- Update the EPICS Website (<http://www.epics.ac.uk>) to support the new project, and use this to help disseminate news during the project. The materials from the first EPICS project will continue to be available.
- Present and participate in national/international events (eg. JISC , CETIS, CRA, ElfEL etc.) where appropriate

Deliverables: dissemination for awareness, understanding and embedding, national conference, regional workshops, supporting documentation

Timetable

Description	Indicative timescales
WP1 – Setup	Months 1-3
WP2 – Partnership and Collaboration	Month 2- onwards
WP3 – Pedagogy	Month 2, 5, 8, 11, 14, 17, 20, 23
WP4 - Technology	Month 2- onwards, with additional peaks at 7, 19
WP5 – Governance	Months 5-7
WP6 - Evaluation	Months 4-6 (formative), 16-24 (summative)
WP7 - Dissemination and Documentation	Months 4-5, quarterly, 12, 18, 21 (dissemination events)

A detailed timetable will be drawn up within WP1.

Consortium details

Lead institution: Newcastle University

Partners - higher education: University of Durham; Northumbria University; University of Sunderland; University of Teesside.

Partners - further education: OWL (via City of Sunderland College/Tyne Metropolitan College); G6 (Tyne and Wear)

Regional stakeholders: Unis4NE, NorMAN, JISC Regional Support Centre Northern (RSC Northern), ASPIRE, CETL4HealthNE.

Strengths of the consortium

The original EPICS project led to the development of a rich community of practice around Personal Development Planning (PDP) and ePortfolios within the NE region. This builds on a strong tradition of collaboration in the region

around eLearning, such as HyLiFe²⁰, OWL²¹, NorMAN²², TLTP3-86²³ and other initiatives, involving many of the same partners, such as CETL4HealthNE²⁴. Each partner brings unique strengths to the EPICS consortium and all are committed to ensuring that this opportunity is converted into permanent outcomes for enhancing student learning and support in the region. The partners believe that success here will underpin and complement other proposed developments, such as better access to greater quantities of quality-assured eLearning materials and sharing resources²⁵, and bid teams in the region have already exchanged drafts. All five NE universities and two FE colleges are involved, with dissemination to other organisations, particularly those meeting DfES/HEFCE²⁶.

Building on existing collaborations²⁷, the **Regional Forum** convened in the EPICS project has helped develop closer community of practice around PDP/ePortfolios within the region. Given the relatively large number and diversity of partners this has been a major achievement with productive workshops leading to while maintaining links with national and international initiatives. The Forum engaged all the HE and FE partners and its work culminated in a regional conference²⁸. This event reported on the work undertaken to date (see Regional Forum Report, the EPICS Toolkit and EPICS final report) but also identified work that still needs to be done to support and develop shared understandings and promote good practice across the region.

At **Newcastle University** it is required that students have access to PDP as part of the Teaching and Learning Strategy. Multiple models of support are used based on structured processes and tutor support²⁹. The University established an ePortfolios Management Group in 2005 to co-ordinate IT support for PDP (with 2 of its members actively engaged in EPICS). The University has a history of activity in this area, including a number of multi-institutional collaborative projects funded by JISC, HEFCE and DfES.

Northumbria University is building on a long history of engagement with PDP, with processes of implementation now supported by cross faculty working groups and minimum standards and expectations for PDP defined across the institution as part of the Teaching and Learning Strategy. The portfolio function on the Learning Portal (Blackboard) was piloted and evaluated in 2005 and there is now a roll out programme of staff training to support wider take up of that facility. Northumbria has now established a Learning Portal resource and discussion site through which a growing number of staff and students contribute to discussion and development and support the work of the ongoing cross school PDP Enhancement Group. The role of ePortfolio and related issues is a key part of that discussion and development and there a number of innovative programme-based ePortfolio projects both established and emerging.

The University of Durham has piloted and rolled out an online PDP formative framework 'form' for all Level 1 and 2 students which prompts them to evaluate their own progress and plan their future development. Provision for final year undergraduates and taught postgraduates will be rolled out in 2006-7. It is taken up by departments and colleges as appropriate and varies from embedding PDP within modules to helping students understand how feedback on their work will support the development of a reflective approach to learning. Colleges have regular tutorial sessions for first-year students which give them the opportunity to reflect on the transition to university in the first instance, and on their experience as it progresses. The Careers Advisory Service is involved in the development of PDPs and provides opportunities for students which will articulate with the PDP process. At postgraduate level the existing Training Needs Analysis and annual reporting cycle are being developed as a PDP tool.

The University of Sunderland has a long record of forging successful strategic partnerships with FE regionally and nationally, for collaborative academic provision. These partnerships also extend to wider areas of support and collaboration, for instance Sunderland hosts the JISC Regional Support Centre Northern which was originally established as a partnership between the University and a consortium comprising every FE college in the North East. Sunderland has strengths in the widening participation agenda, in lifelong learning and work-related learning. Within the University there are active groups for discussion, awareness-raising and decision making regarding PDP, ePortfolio development, legal, security and governance issues concerning inter-institutional information transfer.

The University of Teesside has a long history of engagement with PDP and has established minimum standards and expectations for PDP for all academic programmes. PDP is recognised as part of the University's Teaching and Learning Strategy. During the academic year 2005-6 the University of Teesside undertook a series of investigative trials of ePortfolio use in order to ascertain the requirements of its staff and students. On the basis of those trials the University undertaking formal full-scale pilots of ePortfolio use in each of its 6 academic schools during 2006-7. These trials will allow the University to further refine its ePortfolio systems and permit them to be embedded, as appropriate,

²⁰ HyLiFe <http://hylife.unn.ac.uk>

²¹ OWL is a collaborative e-learning project involving the colleges ('G6') and 3 universities of Tyne and Wear <http://www.owl-elearning.ac.uk>

²² NorMAN <http://www.norman.ac.uk>

²³ Teaching and Learning Technology Programme phase 3 - 86 Networked Learning in Medicine and Health Sciences <http://nle.ncl.ac.uk>

²⁴ Centre for Excellence in Healthcare Professional Education. <http://www.cetl4healthne.ac.uk>

²⁵ JISC 07/04 Circular refers: Higher Education Funding Council for England para. 6 http://www.jisc.ac.uk/index.cfm?name=funding_circular7_04

²⁶ Department for Education and Skills eLearning strategy <http://www.dfes.gov.uk/aboutus/strategy>; Education White Paper 2003 <http://www.dfes.gov.uk/hegateway/hereform/whitepaperconsultation/>; HEFCE eLearning http://www.hefce.ac.uk/Pubs/hefce/2004/04_17/

²⁷ *From Progress Files to e-portfolios: electronic support for Personal Development Planning, A Symposium involving Newcastle and Northumbria Universities*, St James' Park: 15th July 2004

²⁸ Regional PDP Forum (EPICS) Conference, Mansion House, Newcastle upon Tyne, May 2006.

²⁹ Guidance, tutor delivery/involvement; specialist module or modules at strategic moments in the programme; progress files (hard copy and electronic); integrated approach within academic processes and content; a range of student services and support

across the curriculum. Through its Higher Education Business Partnership the University of Teesside also has a strong relationship with its local FE Colleges which it will exploit in an effort to involve those colleges in the project.

The three universities of Tyne and Wear and the 'G6' colleges (including the University of Sunderland and City of Sunderland College) have collaborated around OWL³ and other projects, including a set of pilot Foundation Degrees linked with an ICT theme, and a New Technology Institute. The COSC is one of the largest colleges in the UK, which offers many courses and other facilities. It offers a wide range of student support service and has trained professionals to help and advise students.

Project management, staffing and reporting

Overarching Management: An Advisory Board (chaired by the Project Director) will be established comprising representatives of the partners and major stakeholder groups (including the JISC) which will meet four times during the life of the project. Stakeholders such as NorMAN, the RSC and Eduserv have expressed interest and will be invited to join the Advisory Board. This will be an active group charged with keeping the project in line with institutional, regional, and national imperatives.

Project Management: A Management Group, comprising senior staff of the respective institutions, will be established to oversee the day to day implementation of the project and meet monthly.

Managing, Tracking and Reporting: The project team as part of Work Package 1 will consider the most appropriate project management structure to govern the delivery of the work packages. Initial discussions have suggested the use of agile methods such as Dynamic Systems Development³⁰ as these will sit comfortably with the lighter management styles employed by many of the partner organisations. Agile methods are people rather than process-oriented and as adaptive methodologies are capable of incorporating and managing change over the lifetime of the project. These methods do not discount the use of more structured project management methodologies such as PRINCE2, as most of the elements important within these structured methodologies are also a feature of agile methods. However they have the benefit of giving the project a "light" management touch where it is required while maintaining sufficient control to ensure that the project is managed and run effectively. They would also allow the project to report progress in a PRINCE2 format if this were required by the JISC.

Annual, interim and final reports will be prepared and submitted as required by the JISC, and copies will be placed on the project website. Case studies and other deliverables will be published as they become available, and bound into a handbook.

Risks and limitations

A full analysis of risks will be performed as part of Work Package 1 and submitted to JISC for approval.

Evaluation

The project team will comply with any overarching programme evaluation as outlined in the call. As well as fulfilling summative purposes, there will be a strong formative role for evaluation in this project. The evaluation plan will receive input from the partners (particularly via the Regional Forum, WP3) and the External Evaluator. This will help foster a sense of ownership by partners, engage them to gather formative and summative feedback on the project as it develops and also inform the dissemination strategy. To help the overall project evaluation there will be a partners will be involved in the process of refining the goals and objectives of the project (in conjunction with WP1 & WP3) with a view to defining criteria for measuring success in these – an approach found to be useful in previous projects.

The project will investigate tools and good practice elsewhere for the evaluation of PDP/ePortfolios, including other work involving the CRA/HE Academy³¹ & JISC community. These may inform evaluation of the overall project as well as the specific work packages. Evaluation of specific case studies will also need to be sensitive to the requirements of the particular institutions (eg. their evaluation strategy for PDP). A variety of evaluation methodologies will be employed in the project. The case studies will utilise both questionnaires (quantitative and qualitative data) and focus groups to capture stakeholder feedback, drawing on the considerable experience within the consortium for running these. There will also be an effort to capture the 'practical' lessons learnt from implementing ePortfolios (eg. by semi-structured interviews of stakeholders). These will be included in the case study reports and overall evaluation report.

Results will be included in the documentation produced by the project and made available to the community via the dissemination activities of the project.

IPR and Project Dissemination

The IPR developed within the project will be governed, like other existing projects, within the NorMAN consortium agreement, with input from the institutional contract advisors. All outputs of the project will be provided for free to the education sector in the UK (within legal limitations e.g. data protection)³². The project will ensure dissemination at several levels: awareness; understanding and embedding.

³⁰ Dynamic Systems Development Consortium <http://www.dsdm.org>

³¹ Baume D et al. A tool for evaluating PDP ventures CRA/HE Academy, (draft, 2006)

³² Using either Public Domain –not copyrighted– or Creative Commons <http://creativecommons.org/worldwide/uk/> as appropriate

Dissemination within the partner sites is of primary importance, with focus expanding from regional to national/international during the project life-cycle. Regional dissemination to promote awareness and engagement will be important from the onset, particularly for the successful delivery of WP2 (Partnership and collaboration). This will utilise both existing communication channels (eg. the 'GroupHub' established in EPICS) and networks of personal and institutional contacts to cascade information throughout the region.

The project will also further develop the EPICS Website (<http://www.epics.ac.uk>) to support dissemination. At national event is also planned. Documentation will be produced according to the deliverables outlined above. The project will work directly with partner staff and students, and those who seek advice from the project, in order to embed the outcomes of this work.

Exit strategy and sustainability

At the end of this project the partners will have used and evaluated the developments piloted under the EPICS project to support real examples of regional inter-institutional collaboration based on the sound governance practice needed to support ePortfolio progression pathways. New ways of working will be embedded, and changes in institutional practice will ensure that long term sustainability is upheld at each partner site.

Servers from this project will be maintained for a minimum of two years after the end date and the infrastructure related to the project will be left in place and maintained by the partners who are committed to regional partnerships as exemplified by the NorMAN network and Unis4NE.

The partners are convinced that the regional pilot as developed under the EPICS project can be extended and embedded in regional practice within the budget outlined due to the existing infrastructure and commitment of the partner organisations. Therefore this proposal offers **excellent value for money**.

Key personnel

All staff contributing to the project are already in the employment of the various partner organisations. It is not envisaged that any of the posts contributing to the project will need to be advertised prior to the start of the project.

Project Director: Paul Hopkins is Director of Information Systems and Services (ISS) at the University of Newcastle and has over 20 years experience in a wide variety of technical, consulting and managerial roles within many companies and industry sectors. He has a track record of delivering high quality results in complex situations with short deadlines and proven experience in building pan-European IT organisations, infrastructures and implementing multi-site ERP systems. Apart from his duties within the University, he is actively involved in stimulating many collaborative projects involving Newcastle and the other NE Universities and FE colleges.

Project Manager FMSC: Dr Tony McDonald is full time Assistant Director of the Faculty of Medical Sciences Computing (FMSC) at Newcastle University. He leads on ePET³³, was project manager of the FDTL4 project³⁴ that led to ePET and previously was the project officer on TLTP 'NLE'³⁵. He was also project manager on the IAMSECT project, and is a CETL4HealthNE³⁶ fellow in the Learning Technologies strand. He is responsible for the bespoke VLE used for delivery of the medical programme which has successfully sustained an 80% increase in student numbers over the last five years. He is also involved in several collaborative projects with other medical schools including The University of Birmingham Medical School, Guy's King's and St Thomas' School of Medicine, University of Edinburgh Medical School, University of Wales college of Medicine.

Simon Cotterill is Senior Research Associate in the FMS with a strong interest in ePortfolios/PDP. He has been involved in numerous ePortfolio related projects, including roles as Senior Project Officer for a collaborative FDTL4 ePortfolios project³⁷ and Project Officer in the DfES funded Internet-PARs³⁸. He also has interests in pedagogical and educational issues related to PDP and participates in CRA, CETIS and other national/international. He has been instrumental in designing ePortfolios and applying these in a range of contexts including medicine, dentistry, biosciences and staff development. As well as technical expertise, his background in research has proved useful in the design and implementation of prospective evaluation studies in the use and efficacy of ePortfolios.

Paul Horner - On the original EPICS Project Paul worked as the project officer for FMSC. This was a technical role which involved developing the ePET software to meet the needs of partners. He was responsible for mapping the ePET database to the IMS-LIP XML schema to allow the data transfer processes used for the EPICS Case Studies, and developing the zip-file upload/download tool and XML-RPC data transfer that were central to the Case Studies.

Bruce Ingraham is a Teaching Fellow of the University of Teesside. He currently leads the University's eLearning team and led the EPICS project at Teesside. For the last 15 years he has been involved in the production of online learning resources. As co-director of the EU funded CAMILLE Project in the early 1990s, he was responsible for the production of more than 200 hours of multimedia learning materials. This project, now led by a team in Spain continues to the

³³ <http://www.eportfolios.ac.uk/ePET/>

³⁴ <http://www.eportfolios.ac.uk/>

³⁵ <http://nle.ncl.ac.uk>

³⁶ <http://www.cetl4healthne.ac.uk>

³⁷ <http://www.eportfolios.ac.uk/FDTL4>

³⁸ <http://www.internet-pars.ac.uk>

present³⁹. More recently, he has, with funding from TechDis and the ILTHE, developed resources to support the creation of readable accessible text. He is currently a member of the JISC ePedagogy Project's expert panel.

Dr Malcolm Murray is a Learning Technologist with the IT Service at the University of Durham. He provides primary eLearning support for Medicine at the Stockton Campus and is a System Administrator for the University's VLE - Blackboard, used by all Departments. He has taken the lead role in customising Durham's implementation of Blackboard, developing a range of portal and course tools in Java which link to external resources. A member of the Blackboard Developer's Network, he recently completed a JISC-funded case study "duo - Durham University Online: implementing the Blackboard Community Portal". He was invited as the sole representative from the UK to join the newly created Blackboard standing portal focus group.

Jamie Thompson is a Teaching Fellow and Learning and Teaching Coordinator at Northumbria University. He has led PDP development at Northumbria over the last seven years. He has disseminated and consulted widely in relation to this work. He also brings considerable relevant experience to the project in relation to staff development, work-based and work-related learning and portfolio based learning.

Dave Webster is Assistant Director for Strategy and Development and joint Acting Director of the Student and Learning Support Service at the University of Sunderland. This Service comprises library, IT, MIS, student welfare, and e-learning development. He has a long history of developing strategies and project planning for information systems and business process review and deployment. He is Director of the JISC Regional Support Centre Northern, and has close involvement in regional groups tasked with developing and implementing strategic approaches to eLearning on a regional and sub-regional basis.

Horacio Avestaran is the IT officer for the OWL project. He has a extensive experience of web, database and XML development, and was the developer of the XSLT transforms used for the data transfer between ePET and Blackboard.

Budget

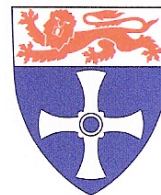
The following table is a summary budget derived from the full TRAC costing prepared using Newcastle University's pFACT costing system. Full TRAC costing is included as Appendix 3.

EPICS2 Budget Summary	Budget (£)		Requested
	Jan - Dec 2007	Jan - Dec 2008	
Main Proposal			
PI: Director of ISS, (10 days) 10@850 per day; Lead Site (Ncl)	4,450	4,450	0
Project Manager (20% FTE ALC5)	11,038	11,038	22,076
Senior Project Officer FMSC (10% FTE ALC3)	4,593	4,593	9,186
Project Officer (100% FTE ALC2)	30,441	31,373	61,814
Contribution to Partner Site (Durham)	5,000	5,000	10,000
Contribution to Partner Site (Newcastle)	5,000	5,000	10,000
Contribution to Partner Site (Northumbria)	5,000	5,000	10,000
Contribution to Partner Site (Sunderland)	5,000	5,000	10,000
Contribution to Partner Site (Teesside)	5,000	5,000	10,000
Contribution to Partner Site (OWL)	5,000	5,000	10,000
Evaluation Activities	5,000	5,000	10,000
Legal / Governance Activities	3,000	3,000	6,000
Mainstreaming Regionally, New FE/Schools, and National Dissemination Activities	8,000	12,000	20,000
Project Hardware Including 1 PC + Software for Project Officer @1K	5,000	0	5,000
Telephony Costs	507	507	1014
Consumables (inc domain name costs)	400	400	800
Contribution to School Costs	1,264	1,264	2,527
Travel & Subsistence (Advisory Board Meetings) + Conference Attendance	2,000	2,000	4,000
Main Proposal Total	105,693	105,625	202,417
FTE Related Costs (FEC institutional Overhead)			
COCE – Clin/Lab	4,148	4,148	0
Estates Type: Office/Class	12,849	12,849	0
Indirect – Clin/Lab	29,836	29,836	0
School Specific	5,420	5,420	0
FTE Related Costs Total	52,253	52,253	0
Requested From JISC			202,417

³⁹ Computer-Assisted Multimedia Language Learning Environment (CAMILLE) www.upv.es/camille/

Appendix 1: Supporting Letters

UNIVERSITY OF
NEWCASTLE UPON TYNE



19 June 2006

Ms Sarah Davies
JISC Executive
Northavon House
Coldharbour Lane
BRISTOL
BS16 1QD

University of Newcastle upon Tyne
NE1 7RU

Pro-Vice-Chancellor
Professor Ella Ritchie

Dear Ms Davies

Support for a Regional Consortium Bid to the JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-Institutional use of e-Learning to Support Lifelong Learners

Please find attached an important project which is being put forward on behalf of all Higher Education institutions in the North East of England to the JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-Institutional use of e-Learning to Support Lifelong Learners.

I am delighted to lend my support to this project which I understand, from discussion with the PI and project members/advisory board members, builds on several past and highly successful projects, and links with our Centres for Excellence in Learning and Teaching. It fits well with our learning and teaching strategies in relation to student support and regional enhancement.

Yours sincerely



PROFESSOR ELLA RITCHIE
Pro-Vice-Chancellor

Morning
64 Princess House
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MANCHESTER
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Mr Paul J Hopkins
Director, Information Systems and Services
Newcastle University
Claremont Tower
Newcastle upon Tyne
NE1 7RU

20th June 2006

Support for a regional consortium bid to the JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-institutional Use of e-learning to support lifelong learners.

Dear Paul,

I was delighted to hear that your team is responding to this call.

As you know, I have had a very close view of the original EPICS bid, as reviewer and now as evaluator. As I said in the Review, "Wherever possible, proposed large-scale collaborative projects should, to some extent at least, build on proven existing networks and relationships." EPICS both built on and substantially strengthened the regional networks around PDP and e-portfolios. The new bid will greatly extend this.

Based on my close view of EPICS I am clear that EPICS2 will provide excellent value for money. It will enable wide implementation of the excellent systems and processes developed by EPICS, using the good working relationships developed among the institutions. And it will build a self-sustaining network of skilled enthusiast for PDP and e-portfolios in the Region, to the great benefit of students and their continued movement and learning.

I very much hope this bid succeeds. It well deserves to.

Yours sincerely,



David Baume PhD FSEDA



Shaped by the past, creating the future

Postgraduate Dean

Mr Paul J Hopkins
Director, Information Systems and Services
Newcastle University
Claremont Tower
Newcastle upon Tyne
NE1 7RU

20 June 2006

Dear Mr Hopkins

Support requested for JISC 07/04 Request for Support for a regional consortium bid to the JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-Institutional use of e-learning to support lifelong learners.

Thank you for alerting our organisation to the development of a proposal in response to the JISC Circular 07/04 on 'North east regional collaboration around e-portfolio progression pathways (with illustrative case studies)'.

I am writing this letter of support as the chairman of the North East Collaboration Group for Researcher Development. This group has members from all universities in the North East region. Our terms of reference include the development and provision of regional early-stage researcher training opportunities and the opening up of in-house training to researchers from other regional universities.

This is an important area for education research and development, and we wish to register our full support to the development of this project along the lines of the outline draft circulated. In particular we are particularly interested in working with the authors to develop a case study based on the provision of systems to support regional-wide booking for and recording the attendance at early stage researcher training events. We wish the authors every success and will await news of the outcome of the bidding process with interest.

Yours sincerely

A handwritten signature in black ink that reads "Douglas Halliday".

Douglas Halliday
Postgraduate Dean, Durham University
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Tel: 0191 334 4668
Fax 0191 334 4578

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Deputy Vice-Chancellor (Learning and Teaching):
Professor Bob Cryan BSc MBA PhD DSc ILTM CEng FIEE CPhys FInstP

Personal Assistant
Mrs Joan Lancaster

Ellison Building
Newcastle upon Tyne
NE1 8ST

Tel 0191 243 7200
Fax 0191 243 7402

Email bob.cryan@northumbria.ac.uk

21 June 2006

Mr Hopkins
Director ISS
Newcastle University
NE1 7RU

Dear Mr Hopkins

Re: Support requested for JISC 07/04 Request for Support for a regional consortium bid to the JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-institutional Use of e-learning to support lifelong learners

Thank you for alerting our organisation to the development of a proposal in response to the JISC Circular 07/04 on "North east regional collaboration around e-portfolio progression pathways (with illustrative case studies)"

This is an important area for education research and development, and we wish to register our full support to the development of this project along the lines of the outline draft circulated. We wish the authors every success and will await news of the outcome of the bidding process with interest.

Yours sincerely

A handwritten signature in black ink, appearing to read "RA Cryan".

Professor Bob Cryan
Deputy Vice Chancellor (Learning and Teaching)



University of Sunderland

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SUNDERLAND SE1 2ND
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TEL: 0191 515 2465
FAX: 0191 515 2007
MOBILE: 07771 220 267
Email: publicaffairs@sunderland.ac.uk

15 June 2006

Paul Hopkins
Director, ISS
University of Newcastle
Newcastle upon Tyne
NE1 7RU

Dear Paul

JISC Circular 03/06: bid for funding: EPICS2 project

We fully support the University of Newcastle in leading a bid to fund a regional project involving ourselves as one of the partners, around e-portfolio progression pathways with illustrative case studies part 2 (EPICS2).

Yours sincerely,

A handwritten signature in black ink, appearing to read 'J.R. Bradshaw'.

J.R. Bradshaw
Deputy Vice-Chancellor



DEPUTY VICE-CHANCELLOR
J.R. BRADSHAW
CPA, FCA

VICE-CHANCELLOR AND CHIEF EXECUTIVE
PROFESSOR PETER EDLER
MBE (MEd) Dip Ed, Soc, HRTM, MEd



21 June 2006

Mr Paul J Hopkins
Director, Information Systems and Services
Newcastle University
Claremont Tower
Newcastle upon Tyne
NE1 7RU

Telephone: 0191 2228040
Fax: 0191 2225016

Dear Mr Hopkins,

Re: Support requested for JISC 07/04 Request for Support for a regional consortium bid to the JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-institutional Use of e-learning to support lifelong learners.

Thank you for alerting our organisation to the development of a proposal in response to the JISC Circular 07/04 on 'North east regional collaboration around e-portfolio progression pathways (with illustrative case studies)'.

This is an important area for education research and development, and we wish to register our full support and willingness to contribute to project deliverables along the lines of the outline draft circulated. We wish the authors every success and will await news of the outcome of the bidding process with interest.

Yours sincerely,

Professor K L Opleesby
Deputy Vice-Chancellor (Academic)



INVESTOR IN PEOPLE
ACCREDITED QUALITY AWARD



PROFESSOR K L OPLEESBY
DEPUTY VICE-CHANCELLOR (ACADEMIC)
VICE-CHANCELLORS OFFICE
UNIVERSITY OF TEESIDE
MIDDLESBROUGH TICE VALLEY
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E-MAIL: k.opleesby@tees.ac.uk



G6 is a consortium of 5 North East Colleges:

City of Sunderland
Gateshead College
Newcastle College
South Tyneside College
Tyne Metropolitan College

June 2006

Mr Paul J Hopkins
Director, Information Systems and Services
Newcastle University
Claremont Tower
Newcastle upon Tyne
NE1 7RU

Telephone: 0191 2228040
Fax: 0191 2225016

Re: Support for a regional consortium bid to the *JISC Circular 03/06 Capital Programme Call for Proposals Annex C Cross-institutional Use of e-learning to support lifelong learners*.

Dear Mr Hopkins,

Thank you for alerting our organisation to the development of a proposal in response to the JISC Circular 07/04 on 'North east regional collaboration around e-portfolio progression pathways (with illustrative case studies)'.

This is an important area for education research and development, and we wish to register our full support to the development of this project along the lines of the outline draft circulated. We wish the authors every success and will await news of the outcome of the bidding process with interest.

Yours sincerely,

Robert. A. Archer – Chair of the G6 Learning Materials Group

further education
colleges
tyne and wear top **6** look no further

Contact

The primary contact for correspondence concerning the project is

Mr Paul Hopkins
Director, ISS
Newcastle University
Newcastle upon Tyne
NE1 7RU

Tel: 0191 222 8040 or 0191 222 8045
Fax: 0191 222 8765
Email: Paul.Hopkins@ncl.ac.uk

The secondary contact is

Dr Tony McDonald
Assistant Director, Faculty of Medical Sciences
Computing
Newcastle University
16/17 Framlington Place
Newcastle upon Tyne
NE2 4AB

Tel: 0191 222 4543
Fax: 0191 222 5016
Email: Tony.McDonald@ncl.ac.uk

Appendix 2: Other contributing personnel

John Snowdon is the systems administrator for the FMS. He has an extensive experience of commissioning, setting-up, deployment and administration of a wide range of systems, including Linux Redhat, Solaris and OS-X based unix systems as well as Windows 2000 server technologies. He is also fully versed in the use of Apache, Kerberos, SSL-based services and other technologies relevant to this proposal.

Dr Diane Nutt leads the University of Teesside's Retention Team, which provides guidance and support for academic Schools, programme teams and staff on all issues which impact upon student retention and progression. She plays an active role in the regional PDP forum that was developed in the EPICS Project. She has experience of managing externally-funded projects and working with teams of staff across the University. She has worked effectively with staff in the University's partner FE Colleges and with staff in universities in the UK and internationally.

Paul Drummond [*Please note that PD is involved in the DeL Programme*] is the Deputy Director of the FMSC. His key interests lie in the development of reflective portfolios to support undergraduate and postgraduate clinical trainees and he is a reviewer for the International Journal of Undergraduate, Postgraduate and Continuing Medical Education. He has been involved in the development of interoperability standards for the exchange of learner information for over five years and is currently a member of the JISC Distributed eLearning Advisory Board. Co-lead on the ePET project, Paul's current projects include the development of an undergraduate and postgraduate portfolio for a consortium of 7 UK dental schools and postgraduate deaneries and the development of teaching materials (covering cancer screening, genomics, end of life issues and shared decision making) to support the CPD of doctors in the United States (Washington and California) funded by the National Human Genome Project / the Center for Disease Control (Atlanta).

Dr Lowry McComb is Director of Postgraduate Training and heads up the Office for Postgraduate Training in Durham University's Graduate School. He also is Senior Fellow in the Department of Physics, teaching and actively researching in high-energy astrophysics. He is currently responsible for implementing the Roberts agenda across the University, including the development of PDP support for postgraduate research students. He is also responsible for the development and implementation of undergraduate PDP across the University. He has been associated with a number of skills development and recording projects (e.g. the Innovations-funded "Making Connections" project) and has extensive experience as a consultant (e.g. for the Open University, LSDA, QCA) in these areas. He is also a member of the Institute of Physics Higher Education group Committee.

Caleb Racey is full time Web Development Officer in the ISS Web Team. He is technical lead in the Maintenance and modernisation of Newcastle's web infrastructure. He has successfully deployed and managed two fully working Shibboleth origin installs at Newcastle and insured Newcastle was the first external member to join both the ATHENS and EDINA SDDS shibboleth federations. He has written comprehensive guides detailing how to install shibboleth and associated infrastructure.

Dr Megan Quentin-Baxter: is Acting Director at the Higher Education Academy Subject Centre for Medicine, Dentistry and Veterinary Medicine (MEDEV)⁴⁰. Involved in a wide variety of educational development activities in the UK and beyond.

Rob Wilson: is a Lecturer in Management and a researcher in the Institute of Policy and Practice at the University of Newcastle Business School. He has lectured widely on information systems in public sector contexts and is module leader of the Information Systems Undergraduate course. He has an interest in the development, implementation and evaluation of information systems. His current work is focussed on information systems in the public sector challenge of multi-agency working. This work has included projects for EPSRC, European Commission, Office of the Deputy Prime Minister (ODPM) and DH looking at a range of issues faced by practitioners and managers, and development of governance structures and production of infrastructures to required to support joined-up service environment.

⁴⁰ MEDEV <http://www.medev.ac.uk/>

Sue Gill is Senior Development Officer in the Quality in Learning and Teaching (QUILT), Newcastle University and leads the team responsible for Curriculum Design and Development support for staff. She has extensive experience of distance and eLearning in both HE and FE. Currently she is leading the team developing an e-PDP system for use in the University to be accessed through Blackboard.

Full TRAC Costing (Newcastle University pFACT system)

See included PDF 'Full TRAC costing Appendix 3' in folder

Dissemination activities year 1	8,000	0	8,000
Dissemination Activities Year 2	0	12,000	12,000
Evaluation Activities	5,000	5,000	10,000
Legal / Governance Activities	3,000	3,000	6,000
Contribution to School Resources	1,264	1,264	2,527
Web-site domain name	100	100	200
Travel	2,000	2,000	4,000
Total Non Staff			103,327

FTE Related Cost

COCE - Clin/Lab	4,148	4,148	8,297
Estates Type: Office/Class	12,849	12,849	25,699
Indirect - Clin/Lab	29,836	29,836	59,672
School-specific	5,420	5,420	10,840
Total FTE Related Cost			104,508

Total FEC **306,925**
