

JISC Circular 9/04: Full Text

Call for Projects to Produce Learning Materials for Deposit in the JORUM National Repository – Exchange for Learning (X4L) Phase 2

October 2004

Sent To: Heads of Further and Higher Education Institutions funded by the English, Scottish and Welsh Further and Higher Education Funding Councils and by DEL, Northern Ireland

**Of Interest To: Librarians and Learning Resource Managers
Directors of Information Services and Systems
Information & Learning Technology Managers
Principal Investigators in Research Teams
Heads of National Data Services and Data Centres**

Introduction

1. This circular invites consortia of further and higher education institutions to submit funding proposals to make available e-learning resources that are suitable for wider national use through the JORUM Repository and to explore e-learning embedding issues.
2. The total funding available for this initiative is £800,000 over 18 months, commencing January/February 2005. It is envisaged that each project will be awarded funding of between £150,000 and £200,000. Each bid must include at least one FE and one HE institution. Either a college or university may act as the lead institution for the bid. The JISC envisages that the overall bids funded will involve institutions from England, Northern Ireland, Scotland and Wales.
3. The aim of the Programme is to build upon the work of the current Exchange for Learning (X4L) Programme by:
 - re-purposing and adapting for re-use publicly-funded content collections and suitable project outputs from previous related programmes to produce learning materials;
 - ensuring that the materials meet specific learning objectives in the context of HNCs/HNDs and/or Foundation Degrees in England, Northern Ireland and Wales, HNCs/HNDs in Scotland and other joint degree initiatives to encourage further effective collaboration within existing FE/HE partnerships; and
 - exploring and articulating the workflow processes required for successful and sustainable re-purposing and re-use.
4. The deadline for receipt of proposals is 12 noon on Friday 3rd December 2004. Projects should commence in January or February 2005 and last for a maximum of 18 months. Projects with some early outputs that can be used/tested by other projects in the Programme are encouraged and will be considered favourably.

Background and Context

5. The JISC is a committee of the UK further education (FE) and higher education (HE) funding bodies which supports colleges and universities in their use of the Internet and other Information and Communications Technology (ICT) applications. The JISC supports FE and HE institutions in exploiting the opportunities of ICT by exercising vision and encouraging collaboration and co-operation. It does this by funding and managing national development programmes and services.
6. There is significant ongoing work funded by the JISC that is particularly relevant to X4L Phase 2. JISC is funding a new [E-learning Programme](#) that covers three large strands of activity: e-learning and pedagogy; technical frameworks; and innovation. The programme has a single over-arching aim: 'to identify how e-learning approaches might be used to facilitate learning and

to advise on how these approaches might be effectively implemented'. Activities that are funded under the programme will lead to guidance for practitioners on the use of e-learning systems; identification of the requirements for new e-learning tools, in particular for learning activity design; the creation of toolkits of technologies to enable the development of integrated e-learning systems, and investigations of innovation technologies such as games and mobile devices. The programme is focused upon investigating the requirements of users of e-learning systems. The [Distributed e-learning Programme](#) is based on the same concepts as the JISC's e-learning programme, but will extend the focus to consider the lifelong learner, regional agendas and subject differences.

7. In parallel, the JISC [Information Environment](#) (IE) development framework underpins the building of an on-line environment that provides secure and convenient access to a comprehensive collection of educational and scholarly resources. This environment is based on the IE [Information Technical Architecture](#), which supports the discovery, access and publishing of resources. It is based on an open standards framework that allows interoperability across a range of resources and services. The IE supports learning, teaching and research activities and a wide range of projects have been funded as part of the IE. Information Environment activities include an overarching Repositories Programme, which incorporates the [Exchange for Learning Programme](#).
8. The proposed X4L Phase 2 builds on an existing programme of work. The Exchange for Learning (X4L) Programme commenced in 2002. A total of 26 projects have been funded from across the UK involving more than 100 institutions and teams from colleges, universities, libraries, JISC Services, local authorities and commercial companies. The programme is exploring the adapting or re-purposing of JISC-funded and other content suitable for use in learning for which copyright clearance can be obtained, and sharing learning materials in a standard way. The four main aims of the X4L Programme are to:
 - use and develop the best available tools to explore whether re-purposing content can become a popular, sustainable way of producing e-learning materials for the future;
 - increase the numbers of people in institutions with the necessary skills to re-purpose learning objects;
 - expose and begin to tackle the challenges associated with re-purposing learning objects;
 - begin to populate a national repository with learning materials as well as case studies and exemplars showing how these have been achieved.
9. The programme is divided into two strands. Strand A is concerned with adapting content for use in learning and teaching, whilst Strand B is developing a content packaging tool called [RELOAD](#), an on-line assessment tool called [TOIA](#) and a test bed repository called [JORUM](#) to support this activity.
10. The JORUM project is part of Strand B of the X4L programme and is currently providing test-bed repository services for the projects within the programme. The JORUM Service will be launched for use by further and higher education in August 2005. This national repository will host and deliver learning materials and case studies relating to the use of e-learning that can be adapted, re-used and re-published for further use. Its target audience consists of teachers, learning technologists and information intermediaries rather than learners. Projects are expected to input into the development of the JORUM Service by providing feedback on usability as and when requested.
11. Some X4L Phase 1 projects have already concluded or are in the process of preparing final reports. The remaining projects will all have ended by October 2005. A number of supporting studies have also been funded to focus on overarching themes that have emerged during the programme. These include:
 - [evaluation support](#);
 - metadata quality;
 - accessibility guidance;
 - staff development "cookbook";
 - assessment item bank requirements study.

12. Outputs of the accessibility guidance and metadata quality studies will be available for the start of X4L Phase 2. The staff development “cookbook” project is ongoing to autumn 2005. Projects in X4L Phase 2 will be able to take advantage of any interim outputs from this project and will also be expected to input into the project as required. It is anticipated that further supporting studies will be commissioned that will require input from projects.
13. A review of X4L was commissioned to enable the X4L Advisory Board to review progress in the area of re-purposing learning materials and to propose priority areas for further exploration. The [X4L Review](#) produced its final report in June 2004. Potential bidders must read the X4L Review report in order to gain a greater understanding of the current programme.

Definitions

14. For the purposes of X4L, the term *re-purposing* means selecting a number of individual assets, for example images, graphs or charts, articles of text, digital animations or video clips, and making them more useful in learning and teaching by adding the learning context to suit a particular course, topic or lesson.
15. For the purposes of X4L, the term *re-use* means selecting existing learning materials that have been developed for a particular course, subject or level and using them with minimum modification within a different course, subject or level.
16. A full glossary of terms is provided at Appendix D.

Scope of the Call

17. X4L Phase 2 provides the opportunity to:
 - increase the value of and access to learning materials produced as part of X4L and other publicly-funded programmes by re-using them and depositing them in JORUM;
 - increase the value of collections of resources that have been digitised as part of public initiatives by re-purposing them for use in a single curriculum area;
 - build upon work previously undertaken by perfecting the re-purposing process and extending this to re-use, with a particular focus on establishing effective workflow processes.
18. This Circular invites bids to develop e-learning materials that meet specific learning objectives in the context of HNCs/HNDs and/or Foundation Degrees in England, Northern Ireland and Wales, and HNCs/HNDs in Scotland and other joint degree initiatives to encourage articulation within existing FE/HE partnerships, and deposit them in JORUM.
19. It is intended that phase 2 will conclude the work of the X4L Programme by taking forward outstanding issues identified in the X4L Review. Proposals should build on existing partnerships and collaborative e-learning developments. Proposals should not seek to undertake extensive research or development work as the focus of this call is on practical demonstration of re-purposing and re-use of learning materials and deposit of materials in the JORUM repository.
20. Projects must explore how establishing effective workflow processes might contribute towards successful re-purposing and re-use. Workflow processes for activities from resource discovery and selection through learning design and the learning process, metadata creation and copyright clearance for deposit in JORUM must be included. Elements of proposed workflows should include staff roles and learner activities as well as exploring amendments to institutional policies and procedures that may be required to ensure this activity is sustainable. Proposed workflows should also consider the issues reported on pages 27-29 of the X4L Review. As well as learning materials, use cases and scenarios describing how the workflows contribute towards successful re-purposing and re-use must be produced. Case studies should also include an exploration of the implications, benefits and opportunities of re-purposing and re-use for learners, teachers and support staff. Where appropriate, projects should identify and make use of case study and use case templates developed within the current X4L programme and e-Pedagogy programme.

21. A list of learning materials and digitised resources to be considered is provided at Appendix C. Proposals should include re-purposing and re-use of learning materials from at least one of the links provided. The use of other available publicly-funded resources not included in the list will be considered if their use is justified in the proposal and rights to use and deposit in JORUM can be cleared. It is considered entirely appropriate that additional material, either sourced from the project's host institution or created within the project, is used to complement the materials in the list in order to produce the learning materials.
22. Learning materials and case studies produced within the programme must be deposited in the JORUM repository. However, the learning materials must also be suitable for use within an institution and therefore must be tested for use in one or more virtual learning environments (VLEs).
23. The JISC will look for phased outcomes as the projects progress. The nature of the project outputs will be expected to:
 - provide a lasting benefit to the community;
 - have a scale and nature concomitant with the level of funding provided;
 - contribute to achieving the JISC's strategic aims.

Terms and Conditions of Grant

24. JISC's Terms and Conditions of Grant (http://www.jisc.ac.uk/proj_tocgrants.html) must be adhered to by all projects. Bidders are advised to read these carefully prior to submitting a proposal.

Consortia

25. The call invites bids from consortia only. It is anticipated that each bidding consortium will include at least three institutions and must include at least one further education institution and one higher education institution. One of the partners within the consortium must be appointed as the lead institution for the project. This can either be a college or a university.
26. Partnerships between bidding institutions and providers of the content are strongly encouraged. Funds can be allocated to external partners via the lead institution. Bidders should note that this work is intended to build upon the work of the current X4L programme and not duplicate it. Existing X4L project holders and JISC-funded services can therefore be included in a bidding consortium.

Project Management Guidelines

27. Projects will be expected to follow JISC's Project Management Guidelines (http://www.jisc.ac.uk/proj_manguide.html), including adherence to good project management practices, regular reporting and participation of projects in steering committees. Specific guidance for projects can be found at: http://www.jisc.ac.uk/prof_info.html. A Programme Manager based in the JISC Development Team will provide management support to projects.

Standards

28. The use of standards is very important to ensure that learning materials can be shared as widely as possible within our community. When creating the metadata that describes their learning materials, an application profile of the IEEE LOM (Learning Object Metadata) specification has been specifically developed for X4L. All projects must use this specification. The specification and supporting documentation can be found at <http://www.cetis.ac.uk/static/profiles/uklomcore>. The RELOAD tool and JORUM repository have been developed to support the X4L Application Profile to ensure maximum interoperability between the systems that is essential to the transportation and storage of learning objects. IMS Content Packaging and SCORM specifications are also being implemented within X4L. An X4L Support Officer, based at the [Centre for Educational Technology and Interoperability Standards](#) (CETIS), supports projects in their use of standards and this support will continue through X4L Phase 2.

Evaluation

29. All projects must produce an evaluation report that includes the following aspects:

- evaluation of the project processes and procedures;
- evaluation of resource selection activity including the criteria for selection and the suitability of publicly-funded resources for re-purposing and/or re-use;
- evaluation of the use and usefulness of the learning materials produced involving teacher and learner experiences;
- evaluation of the impact of the project activity on institutional policy, procedure and practice.

A website containing helpful materials to support project evaluation can be found at <http://www.cerlim.ac.uk/projects/efx/index.html>.

IPR

30. Projects will be responsible for clearing rights of any materials that they use to develop their learning materials for deposit in the JORUM. Establishing partnerships with the providers of content listed in Appendix C is strongly encouraged to assist with this. It is anticipated that a workshop will be held as part of the programme start-up meeting where experiences of current and past X4L projects will be shared. A guide to copyright and IPR in e-learning will be available from the start of the programme and [JISC Legal](#) can offer advice and guidance in this area. The Programme Manager will share other identified good practice on an ongoing basis throughout the programme.
31. As a general rule the JISC does not seek to retain IPR in the project deliverables created as part of its programmes. However funding is always made available on the condition that project outputs are made available, free at the point of use, to the UK HE and FE community in perpetuity, and that these may be disseminated widely in partnership with the JISC. For outputs such as reports or model strategies a non-exclusive licence allowing JISC or its representatives to utilise, archive and disseminate the work will be required.
32. It is intended that the deliverables created as part of this programme will, as appropriate, be deployed by the JISC as part of a long-term strategy for providing access to community resources and where this is possible arrangements for archiving of deliverables will be set in place. However, wherever possible, projects will be encouraged to set in place mechanisms to ensure the continued availability and currency of deliverables after funding has ended. In the majority of cases the JISC will not be able to commit to the long term delivery or maintenance of project outputs after the end of the programme, though guidance will be given about opportunities for continuation funding and embedding within institutions.

Bidding Process

33. A guide to bidding for JISC projects can be found at: <http://www.jisc.ac.uk/bidguide.html>
34. Bids should not exceed a maximum of 10 single-sided A4 sheets plus optional appendices, and should be in a minimum of 10 point font. All key information, e.g. outline project plan and budget, MUST be included within the 10 page limit rather than as an appendix. If the main part of the bid exceeds 10 pages, evaluators have the discretion to discount information provided beyond the indicated page limit. Each bid MUST also be accompanied by a completed cover sheet (see Appendix A) AND a letter of support from an authorised senior manager from each institution named in the consortium. The cover sheet and supporting letters do not count towards the 10-page limit.
34. One electronic copy and one hard copy of the bid MUST be sent, both including all appendices, cover sheet and letters of support. Both versions MUST be received by **12 noon on Friday 3rd December 2004**. Faxed or late proposals in either format will not be accepted. Bidders are advised not to rely on first class post for next day delivery of the hard copy.
35. The hard copy should be sent to:
Nike Holmes, JISC Executive, Northavon House, Coldharbour Lane, Bristol BS16 1QD.
36. The electronic copy should be sent via email to:
n.holmes@jisc.ac.uk

Format of Bids

37. To assist in the assessment of all proposals against a common baseline, proposals should be structured as follows
- A. **Cover Sheet** - Completion of the cover sheet at Appendix A.
 - B. **Introduction** – A brief outline of the nature of the work to be undertaken, the length of the project, confirmation of the January/February 2005 start date, and a summary of how the project will contribute to the programme.
 - C. **Project description** – A description of the intended project plan, timetable and deliverables, risk analysis, and an explanation of how the detailed project outcomes will be of value to the JISC community.
 - D. **Budget** – A summary of the proposed budget which in broad outline identifies how funds will be spent over the life of the project, including a breakdown of funding requested across academic years (1 August to 31 July); staff costs, equipment and consumables, travel and subsistence, dissemination, evaluation and other costs should be itemised. Proposals should clearly indicate the financial contribution from host institutions and project partners (e.g. overheads, equipment, staff time etc.).
 - E. **Key personnel** – Names and brief career details of staff expected to contribute to the project, including qualifications and experience in the area of work proposed and evidence of any projects of similar nature successfully completed. Clearly indicate when posts will need to be advertised and the skills and experience that will be sought.
 - F. **Supporting letters** – Copies of the letters of support from a senior representative of the lead institution and all project partners.

38. Bidders should ensure that proposals include the following:

- the Foundation Degree/HNC/HND/Joint Degree subject for which learning materials will be produced;
- the external collections that are to be re-purposed/re-used;
- how materials developed will be used with learners and the outcomes evaluated;
- a commitment to contribute towards addressing identified programme-level issues;
- a commitment to working closely with the JORUM repository service providers as required to assist them in developing and improving the JORUM service;
- how the consortium will work with other projects across the programme;
- how their project outputs and outcomes will be widely disseminated.

Timescales and Funding

39. Funding is available on a scale of £800,000 over 18 months from the date of award. Projects should commence not later than 1st February 2005. It is envisaged that each project will be awarded funding of up to £200,000.
40. Projects with some early outputs that can be used / tested by other projects in the programme are encouraged and will be considered favourably.

Evaluation of Bids

41. Proposals will be evaluated according to the following criteria:

Quality of proposal and workplan – the extent to which the proposal addresses the issues and demands outlined in the call, and shows innovation that supports the aims of the call; the quality of the proposal will be assessed on the basis of the deliverables identified and the evidence provided of how these will be achieved including an assessment of the risks (25%).

Impact – the extent to which the project outcomes will be of overall value to the FE/HE and communities; included in the assessment under this criterion will be the need for sustainability of the work at the end of the project funding period (25%).

Partnership, evaluation and dissemination – the degree to which the proposal demonstrates an openness and willingness to work in partnership with JISC in forward planning, dissemination and evaluation, and the potential for extended partnership beyond the funding period (10%).

Value for money – the value of the expected project outcomes *vis-à-vis* the level of funding requested, institutional contributions, taking into account the level of innovation, chance of success and relevance to the target communities (15%).

Previous experience of the project team – evidence of the project team's understanding of the technical and/or management issues involved, and of its ability to manage and deliver a successful project, for example through work done to date in the area or in related fields. The **strength of the consortium** will be considered as part of the project team criteria. This refers to evidence of the commitment shown by the consortium partners to the consortium and the proposed project, and the degree to which the work proposed is aligned with institutional strategies. Proposers may wish to produce evidence such as partnership agreements, strategic plans, working papers etc. These may be included as appendices to the proposal and need not be counted within the 10-page limit (25%).

42. Notwithstanding the weightings of the evaluation criteria, proposals that fail badly on any one criterion may be rejected, and proposals showing exceptional strength in one or more areas with serious weaknesses in others may be funded. In making awards under this call the JISC will take into account the need for an appropriate, varied and affordable portfolio of projects and partners. It is not, therefore, necessarily the case that the projects with the highest raw scores will be those funded in all instances.
43. The JISC will consider these proposals and will endeavour to notify successful bidders by the end of 17th December 2004. The JISC will expect to work with the selected projects to agree the workplan and to ensure that the project budget is appropriate and suitably profiled. It may be necessary to negotiate some aspects of the project objectives and content with the project teams in the interest of maximising the expected benefits of the programme as a whole.

Further Information

44. Enquiries about the content of this circular should be sent to:
Susan Eales, Programme Manager X4L, JISC, Strand Bridge House, 138-142 Strand, London WC2R 1HH; tel: 07973 429132, s.eales@jisc.ac.uk
45. General enquiries about the proposal submission process should be sent to:
Nike Holmes, JISC Executive, Northavon House, Coldharbour Lane, Bristol, BS16 1QD;
tel: 0117 931 7427, n.holmes@jisc.ac.uk

JISC Executive
October 2004

Appendix A

Cover sheet for proposals (*All sections must be completed*)

**JISC Exchange for Learning (X4L)
Programme: Phase 2**

| |
|---|
| Name of lead institution/organisation |
| Name of proposed project |
| Project partners |
| Full contact details for primary contact Name: Position: Email: Address: Tel: Fax: |
| Length of Project |
| Project Start & End Dates |
| Total Funding Requested from JISC |
| Cost of proposal to the JISC in each academic year (1 August – 31 July) Jan/Feb – July 2004 (04/05 AY) August 2004 – Project End Date (05/06 AY) |
| Total Institutional Contributions |
| Outline Project Description |

Appendix B: Relevant JISC Advisory and Expert Services

CETIS

<http://www.cetis.ac.uk>

JISC Legal

<http://www.jisclegal.ac.uk>

Techdis

<http://www.techdis.ac.uk>

UKOLN

<http://www.ukoln.ac.uk>

Appendix C: List of resources to be considered for re-purposing & re-use

NLN materials: <http://www.nln.ac.uk/materials>

These materials are copyright cleared for use in post-16 education in England, Scotland Northern Ireland and Wales. However, only registered representatives from further education (FE) colleges can download the materials onto their own institutional servers. It is hoped that HE institutions will be able to download the NLN materials soon.

Census Data held at <http://www.data-archive.ac.uk/>; <http://census.ac.uk/cdu/>;
<http://edina.ac.uk/ukborders/access/>

Go to the following web pages at the UK Data Archive which provide information on accessing and using census data:

Access agreements: <http://www.data-archive.ac.uk/orderingData/linkAccessAgreement.asp>

Special conditions: <http://www.data-archive.ac.uk/orderingData/linkAdditionalAgreement.asp>

Sharing data: <http://www.data-archive.ac.uk/orderingData/sharingData.asp>

JISC 5/99 Learning & Teaching Programme Outputs. Resource guides for project outputs are at

http://www.jisc.ac.uk/index.cfm?name=programme_learning_teaching

HEFCE-funded Fund for the Development of Teaching and Learning (FDTL) Resources at

http://www.ncteam.ac.uk/projects/fdtl_projects/index.htm

HEFCE funded Teaching and Learning Technology Programme (TLTP) at

<http://www.ncteam.ac.uk/projects/tltp/tltp1/index.htm>

X4L project outputs in collaboration with project teams (JORUM not available until August 2005).

http://www.jisc.ac.uk/index.cfm?name=programme_x4l

Projects funded as part of the NOF Digitisation of Learning Materials Programme

<http://www.nof-digitise.org/>. These materials are copyright cleared for private study use and are all available via the Internet, People's Network terminals in public libraries and the National Grid for Learning <http://www.ngfl.gov.uk/>. In a few cases, high-quality streamed audio visual resources and/or high resolution images are only available to registered users. All NOF digi projects are showcased through the EnrichUK portal <http://www.enrichuk.net/> and all are available via their individual websites.

Bidders must liaise with representatives from the above projects with regard to copyright status and permissions.

SCRAN: <http://www.scran.ac.uk>

In particular, the learning materials, animations and multimedia materials available in this collection.

SCRAN can be accessed via a JISC subscription agreement. Details of the agreement can be found at <http://www.jisc.ac.uk/index.cfm?name=scranresourcebase&src=alpha>. Please note that the year 5 rate only applies at this stage.

SCRAN are supportive of the X4L Programme and would be very pleased to be contacted by any bidders wishing to enter into a partnership with them. Learning materials developed using SCRAN resources can be deposited in JORUM as long as they contain only thumbnail versions of individual images, and once deposited, modifications, abstracts or excerpts cannot be made.

Appendix D: Glossary and Useful URLs

| | |
|------|---|
| FDTL | Fund for the Development of Teaching and Learning |
| FE | Further Education |
| HE | Higher Education |
| IMS | The IMS Global Consortium |
| JISC | Joint Information Systems Committee |
| NLN | National Learning Network |
| TLTP | Teaching and Learning Technology Programme |
| VLE | Virtual Learning Environment |
| X4L | Exchange for Learning Programme (X4L) |

(For more information and links to web sites see <http://www.jisc.ac.uk/glossary/index.html>)