

# JOINT INFORMATION SYSTEMS COMMITTEE

## INVITATION TO TENDER

### **Risk assessment for the distributed e-learning regional pilots and Higher Education Academy Subject Centre projects**

#### Summary

1. The Joint Information Systems Committee (JISC) wishes to commission an individual or team to identify the key risks facing a number of projects within the Distributed e-Learning strand of the e-Learning Programme, and plan the provision of advice and training to help projects minimise these risks. The risk assessment should focus particularly on the risks associated with the types of project and areas of work undertaken by the regional pilots and Higher Education Academy Subject Centre projects, rather than on the sort of generic risks which are attendant on all projects.
2. The Distributed e-Learning strand of the e-Learning Programme has been funded by the Higher Education Funding Council for England (HEFCE) to facilitate lifelong learning and wider participation in higher education by providing learners with:
  - a more seamless learning experience
  - better learning tools
  - easier access to personal learning information such as portfolios
  - access to greater quantities of quality-assured learning materials

The funding has also enabled JISC to work and the Higher Education Academy to work together in a strategic partnership to explore how existing and new resources can be used, shared and developed by the subject communities. Teaching staff will benefit from guidance on locating and using learning resources, and from advice on how to share teaching materials with others.

3. The proposed study will support the regional distributed e-learning pilot projects, funded under JISC Circular 7/04, and the Higher Education Academy Subject Centre projects. The regional pilot projects will be announced in mid-December 2004, to start in January-April 2005. The Higher Education Academy Subject Centre projects will start between November 2004 and March 2005. The projects under both areas will finish in March 2006.
4. Around £25,000 to £35,000 (including VAT and expenses) is available for this study over a three month period (January-April 2005). Tenders should be submitted no later than noon on 13 December 2004.

#### Background

5. The Joint Information Systems Committee (JISC) supports further and higher education by providing strategic guidance, advice and opportunities to use Information and Communications Technology (ICT) to support teaching, learning, research and administration. JISC is funded by all the UK post-16 and higher education funding councils.
6. JISC's e-Learning Programme aims to identify how e-learning might facilitate learning and to advise on its implementation. It focuses on four areas: e-learning and pedagogy; technical frameworks for e-learning; innovative use of e-learning; and distributed e-

learning. The Distributed e-Learning strand has emerged through a desire to move e-learning into the mainstream of learning and teaching practice, and to reflect the growing regional aspect to higher education.

7. The aims of the distributed e-learning strand are:
  - To develop models to show how local, regional and national systems will work together to provide coherent access to e-learning resources.
  - To establish regional pilots to evaluate the integrated use of e-learning systems, tools, repositories, and content to support widening participation and lifelong learning.
  - To extend the generic e-learning technical framework for use at regional level, and develop national services to support regional use, e.g. repositories and question banks.
  - To develop tools for teachers and learners to support lifelong learning, and content to populate the repositories and question banks.
  - To develop practical guidelines for implementing e-systems and sharing e-learning content within regional and subject-based communities.

A strategic overview of the Distributed eLearning strand is available on the JISC website at: [www.jisc.ac.uk/uploaded\\_documents/eDistributed-strategic-overview.doc](http://www.jisc.ac.uk/uploaded_documents/eDistributed-strategic-overview.doc).

### **Regional e-learning pilot projects around distributed e-learning**

8. The aim of the regional pilot projects is to explore the use of e-learning systems and tools across a number of institutions across higher and further education within a region to facilitate wider participation in higher education and provide better opportunities for lifelong learners. These pilots are focussing on three themes:
  - Theme 1: Facilitating progression
  - Theme 2: Collaborative teaching and sharing of resources across institutions
  - Theme 3: Supporting the independent lifelong learner
9. Calls for proposals for the regional pilot projects were requested in the JISC circular 7/04: Regional e-learning pilot projects around distributed e-learning. This is available on the web at: [http://www.jisc.ac.uk/funding\\_circular7\\_04.html](http://www.jisc.ac.uk/funding_circular7_04.html). Successful projects will be notified in mid-December 2004, start in January-April 2005, and finish in March 2006.
10. A series of regional town meetings has been held to provide briefings on the circular and enable delegates to discuss ideas for projects and priority needs in their region. The outcomes of these meetings are available on the web from: [http://www.jisc.ac.uk/programme\\_edistributed.html](http://www.jisc.ac.uk/programme_edistributed.html).

### **Higher Education Academy Subject Centre projects**

11. Funding has been made available to the 24 Higher Education Academy Subject Centres to explore the issues of sharing learning resources through a discipline-based focus. In particular, groups of subject centres have been encouraged to collaborate to effectively utilise resources in cognate areas.
12. Each Subject Centre has been allocated up to £40,000 to spend on this work, and have submitted project ideas to the Higher Education Academy e-Learning team. These projects will start between November 2004 and March 2005, and will be completed by March 2006. Further information about these projects is available on the Higher Education Academy website at: <http://www.heacademy.ac.uk/thematic/distributedelearning.htm>.

13. The Subject Centre activities proposed under the Distributed e-Learning strand focus on exploring the issues associated with the sharing and re-purposing of learning and teaching resources. Where applicable projects will build on, or work with, previous and existing JISC projects and services.

### **Aims and Objectives**

14. The aim of this study is to increase the likelihood of success of the regional pilots and the subject centre projects by identifying the risks that threaten these projects and identifying guidance and training which can help the projects minimise these risks.
15. The objectives of this study are:
  - To identify the risks to the projects
  - To provide projects with an annotated bibliography of available guidance which could help them mitigate risks and avoid potential pitfalls
  - To work with JISC to identify and prioritise areas in which face to face or online training for projects is required
  - To identify sources of such training, and provide advice on scheduling
  - To provide a plan for an ongoing support structure for these projects

### **Terms of reference**

16. The risk assessment should focus particularly on the risks associated with the types of project and areas of work undertaken by the regional pilots and subject centre projects, rather than on the sort of generic risks which are attendant on all projects. Characteristics of these projects are:
  - They involve collaboration. In the case of the regional pilots, this collaboration will be across a number of institutions and across different sectors.
  - They may involve sharing and repurposing of learning resources and other materials.
  - They may be building on emerging technology in a rapidly developing field.
  - They may be using technology which does not have conventional support arrangements in place.
  - They may be joining up different technologies and systems.
  - They will need to plan for sustainability beyond the end of the funded period.
  - The regional pilots need to ensure that they move from planning and development to piloting with users in 6-9 months.
17. Particular risks to the projects which JISC has identified and which need to be considered include:
  - Risks associated with intellectual property rights, particularly to do with sharing and repurposing resources.
  - Risks associated with implementing lifelong learner records and sharing learner data.
  - Risks associated with the sustainability of the service provided, particularly where there may be tension between planning for long-term sustainability and the need to deliver short-term project results.
  - Risks associated with working in large regional cross-sector consortia.
  - Risks associated with building on JISC's current and previous work.
18. Guidance which is identified as being relevant and useful for the projects should be freely available to UK further and higher education, and should be from a trusted source. Sources likely to be useful include:

- JISC and the JISC services (including outputs of projects and studies)
- The British Educational Communications and Technology agency (Becta)
- Learning and Teaching Scotland
- Higher Education Academy
- Other UK government departments and agencies<sup>1</sup>
- Higher education institutions
- Further education colleges

## Deliverables

19. The outputs from this study are expected to be:

- An agreed detailed work plan two weeks after the start of the contract.
- A report of less than 20 pages, written in clear, plain English, intended for the project managers of the regional pilots and subject centre projects which includes:
  - Analysis of the main risks facing these projects. These should be classified into risks which affect project start-up and need to be addressed immediately, and risks which can be addressed in the longer term.
  - An annotated bibliography and links to existing guidance (in written or other format) on issues which are relevant to the risks or their management. It is intended that this should enable project teams to locate and make the best use of guidance on the issues which affect them.
- A report of less than eight pages, written in clear, plain English, intended for the JISC Executive, recommending areas in which face to face or online training should be provided for project teams. The need for such training may be due to lack of available guidance on the issue, to its importance, or to its complexity. This report should also include:
  - Advice on scheduling and priority of training, such as which courses need to be organised immediately, and which are less urgent or would have greater impact later in the life of the projects.
  - Where possible, identification of possible providers of the recommended training.
- A report of less than eight pages, written in clear, plain English, intended for the JISC Executive, with recommendations for an ongoing support structure for the regional pilots and subject centre projects. This should include:
  - Identification of the areas in which (if any) such ongoing support is necessary.
  - Recommendations on how such support could be provided, and by what kind of organisation(s) or individuals.

20. Other expectations are:

- The contractor will be expected to work closely with the Distributed eLearning Programme team within the JISC Executive and the e-Learning Team at the Higher Education Academy to ensure there is a shared understanding of the work and its progress.
- The study's prime function is to act as a source of information for the JISC Executive, Distributed eLearning Programme Advisory Board and for the regional pilots and subject centre projects. However the outputs, in particular the annotated bibliography of guidance, should be produced so they can be shared more widely with the further and higher education community.
- Prior to final acceptance of the outputs a draft should be submitted to the JISC Executive for comment.
- The final reports will be made available on the web.

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<sup>1</sup> Such as the Risk Management section of the Office of Government Commerce's Successful Delivery Toolkit, available on the web at: <http://www.ogc.gov.uk/sdtoolkit/workbooks/risk/index.html>

- At the conclusion of the study the contractor may be invited to present the results at a meeting of the relevant JISC committee or committees.
21. It is anticipated that the study will take approximately 35-55 days' work.
22. The information provided in the reports of the study, and the rights to all other outputs, shall become the property of the Higher Education Funding Council for England (HEFCE) on behalf of the JISC and the other funding councils.

### **Timescale**

23. The timescale is as follows:
- Bids should be submitted by noon on 13 December 2004.
  - It is expected that bidders will be notified of the outcome of the evaluation process by 23 December 2004.
  - The contractor will be expected to commence work on or before 6 January 2005 and to meet with JISC programme managers and to have agreed the project plan by 20 January.
  - Deliverables are to be produced at a time appropriate to the needs of the projects, and will need to be phased. It may also be necessary to phase the delivery of a single deliverable: for example, if there is one key issue that all the projects are facing at start-up, guidance and training for this may need to be tackled first.
  - Drafts of all deliverables will be expected by 8 April 2005.
  - Final versions of all deliverables should be submitted by 22 April 2005.

### **Evaluation**

24. An evaluation panel comprising of experts from the educational community and the JISC Executive will be responsible for evaluating submitted proposals on the basis of the following criteria:
- Compliance with and understanding of the requirements.
  - Quality of work plan and suitability of methodology in meeting the requirements.
  - Relevance of previous experience of the tendering organisation(s) and of the particular consultants and/or researchers to the study.
  - Analysis and management of risks to successful completion of the study.
  - Value for money.

### **Funding**

25. Funding of around £25,000 to £35,000 is available for this study, inclusive of VAT and related travel and subsistence.

### **Proposals**

26. Proposals should demonstrate the following:
- Experience and understanding of the requirements of e-learning development and pilot projects.
  - Knowledge and understanding of current e-learning initiatives and practice in both further and higher education sectors, with particular reference to the work of JISC.
  - Familiarity with Circular 7/04: Regional e-learning pilot projects around distributed e-learning, and understanding of the likely profile of the projects which will be funded under this call.

- Awareness of the work of the Higher Education Academy Subject Centres and of the challenges facing them in the area of e-learning.
- Experience in undertaking similar types of work.
- Methodology to be adopted.
- A work plan with milestones and deliverables.
- Details of personnel to work on the study, including CVs. (CVs should be included in an appendix and are not counted within the six page maximum bid length.)
- Overall budget and detailed breakdown of main areas of work, including the relevant daily rates/pro-rata salary against each member of the team to work on the study.

### **Management**

27. The contract will be overseen by Sarah Davies, Programme Manager, JISC Executive, and will report to the Distributed e-Learning Programme Advisory Board. The contractor will report at regular intervals as agreed at the time of commissioning.

### **Submission**

28. Proposals of no more than six pages of A4, typeset in Arial or a similar font at 10 point size, should be submitted both as a single sided, unbound hard copy, and as an electronic copy via email. Both copies MUST arrive by the deadline. Proposals MUST also include the completed cover sheet at Appendix A to this invitation to tender, in addition to the six page maximum bid.
29. Proposals must be received no later than 12 noon on 13 December 2004. Faxed or late proposals WILL NOT BE ACCEPTED. Both email and hard copy proposals should be sent to:

Ann Lloyd, JISC Executive, Northavon House, Coldharbour Lane, Bristol, BS16 1QD,  
tel: 0117 931 7111; email: [a.lloyd@jisc.ac.uk](mailto:a.lloyd@jisc.ac.uk).

30. The JISC reserves the right not to accept the lowest (or any) tender received.

### **Further information**

31. Any queries regarding this invitation to tender should be sent to Sarah Davies, JISC Programme Manager at JISC Bristol Office, phone: 0117 954 5076, mobile: 07785 518564, email: [sarah.davies@bristol.ac.uk](mailto:sarah.davies@bristol.ac.uk).

Appendix A

Cover sheet for proposals

**JISC Invitation to Tender: Risk assessment for the distributed e-learning regional pilots and Higher Education Academy Subject Centre projects**

*(NB: All sections must be completed)*

<b>Name of lead institution/organisation</b>
<b>List consultants/partners, if any</b>
<b>Full contact details for primary contact</b>  Name: Position: Email: Address:  Tel: Fax:
<b>Total cost to the JISC:</b>
<b>Outline proposal description</b>