

JOINT INFORMATION SYSTEMS COMMITTEE

INVITATION TO TENDER

Evaluation of 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 review the work of the distributed e-learning regional pilots and Higher Education Academy Subject Centre projects and synthesise the lessons learned. The purpose of the study is to aid JISC in planning future funding calls and dissemination of programme outcomes.
2. The proposed study will be focussed on the work of the regional distributed e-learning pilot projects, funded under JISC Circular 7/04, and the Higher Education Academy Subject Centre projects. These 44 projects started between November 2004 and April 2005, and will all finish in March 2006. However, in order to evaluate that work in appropriate context, the study will also need to look at the work of other JISC programmes, such as Exchange for Learning phases one and two, and Managed Learning Environments for Lifelong Learning phases one and two. It will also be necessary to consider work funded from other sources, such as the Scottish Funding Councils' Transformation projects, and the HEFCE-funded Lifelong Learning Networks.
3. The study has two main deliverables: an interim review of the work of the regional pilots and subject centre projects, due on 2 December 2005, and a final evaluation and synthesis of the lessons learned by the projects, due in late June 2006.
4. It is estimated that this study will require 80-100 days' work, irregularly distributed over the period October 2005 to June 2006. Funding will be commensurate with the effort proposed in the tenders. The total cost should include all expenses associated with the work, ie VAT, travel and subsistence etc. Tenders should be submitted no later than 13:00 hrs on 22 September 2005.

Background

5. The 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 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 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.

8. The objectives 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.

9. JISC and the Higher Education Academy are also working together on the implementation of HEFCE's e-Learning Strategy. The strategy is available at: http://www.hefce.ac.uk/pubs/hefce/2005/05_12/

Regional e-learning pilot projects around distributed e-learning

10. 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

11. Twenty-one projects were selected at a total budget of £3.6 million, and run from January-April 2005 to the end of March 2006. Further information on the projects is available on the web at: <http://www.jisc.ac.uk/pilotsdetail.html>

12. 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.

Higher Education Academy Subject Centre projects

13. Funding has been made available to the Higher Education Academy Subject Centres to explore the cultural and subject issues related to the sharing and reuse of resources. Twenty-three of the 24 Subject Centres have each been allocated up to £40,000 to

spend on this work, and are using it to carry out a wide range of mini-projects to meet or explore the e-learning needs of their practitioner community. Where applicable projects will build on, or work with, previous and existing JISC projects and services.

14. The Subject Centre projects started 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>.

Aims and Objectives

15. The aim of the study is to provide a synthesis and summary of the lessons learned by the distributed e-learning regional pilot projects and Higher Education Academy Subject Centre projects, to aid JISC and the wider community in understanding the emerging lessons and appropriately applying and building upon them.
16. The objectives of this study are:
 - To undertake an initial review of the projects and produce and identify early lessons which could be built on and issues which should be addressed.
 - To identify and synthesise the final lessons learned by the projects.
 - To identify areas of successful innovation or emerging good practice from the projects which could be built on by JISC and the wider community.
 - To assess the progress of the projects towards realising the overall aim of the distributed e-learning programme (see paragraph 7 above).
 - To identify gaps in the work carried out by the projects which could be addressed in a future funding call in order to meet the aim of the programme.

Terms of reference

17. The focus of the study is to evaluate and synthesise the lessons learned by the two groups of distributed e-learning projects: the regional pilots and the Academy Subject Centre projects. However, these projects need to be viewed in the context of other work in order to identify common lessons, complementary activities, or gaps. Therefore, the study must also review relevant work carried out under the following initiatives, where this contributes to the overall aim of the distributed e-learning programme (paragraph 7).
 - JISC Exchange for Learning programme phases 1 and 2:
http://www.jisc.ac.uk/programme_x4l.html
http://www.jisc.ac.uk/programme_x4l_phase2.html
 - JISC Managed Learning Environments for Lifelong Learning programme phases 1 and 2:
http://www.jisc.ac.uk/programme_buildmle_hefe.html
http://www.jisc.ac.uk/programme_mle_lifelong2.html
 - JISC Digital Repositories programme
http://www.jisc.ac.uk/programme_digital_repositories.html
 - Scottish Funding Councils' e-Learning Transformation programme:
http://www.sfefc.ac.uk/about_us/departments/learning_teaching/e-learning_&_transformational_change.html
 - HEFCE's Lifelong Learning Networks
<http://www.hefce.ac.uk/widen/ln/>
18. The final project reports for the regional pilots and Subject Centre projects are due in April 2006, and the individual or team appointed will be expected to use these as one of the main bases of the final evaluation report, along with interviews with projects and other stakeholders. Interim quarterly reports and other deliverables will also be available.

19. The other funded projects to be reviewed (as listed in paragraph 17) are at a number of different stages depending on their funding programme, from those which have recently finished to those which are just starting and have two years still to run. The individual or team appointed will need to develop appropriate methodologies to review projects at these different stages. These would be expected to include:
- Reviewing final or interim reports
 - Reviewing final or interim deliverables
 - Reviewing project plans
 - Interviewing selected projects

Where available, programme-level evaluation reports should be consulted.

20. Key programme-level stakeholders should also be interviewed to assess their perceptions of the achievements and gaps of the programmes. These include programme steering group/advisory board members and programme managers/directors.
21. The study will be expected to identify lessons, innovations and gaps which are relevant to (amongst others): teaching and learning staff, student support staff, technical staff, senior managers, regional or subject bodies, and policy makers.

Deliverables

22. The study has two main deliverables: an interim review of the work of the regional pilots and subject centre projects (D1), due on 2 December 2005, and a final evaluation and synthesis of the lessons learned by the projects (D2), due in late June 2006.
23. D1 is a report for the JISC Executive assessing the extent to which the overall aim of the Distributed e-Learning programme is likely to be met by existing work, and making recommendations to inform the structure and content of future programmes developing the area of distributed e-learning to build on successes and address gaps. This report should:
- Provide a review of the projects funded under the Distributed e-learning regional pilots and the Higher Education Academy Subject Centre projects, to establish the extent to which they are likely to meet the overall aim of the Distributed e-learning programme (paragraph 7 above.)
 - Provide a review of relevant projects funded under other initiatives (see the list in paragraph 17 above) to identify where these contribute to the aim of the Distributed e-learning programme.
 - Identify areas of successful innovation or emerging good practice from the projects which could be built on in a future funding call.
 - Identify gaps in the work carried out by the projects which would need to be addressed in future work in order to meet the aim of the programme.
 - Make recommendations that can inform the structure and content of future programmes developing the area of distributed e-learning in order to best build on previous good work and address gaps.
 - Make recommendations on how links could best be made between current and future JISC programmes, and the Lifelong Learning Networks funded by HEFCE.
24. D2 is a report for the JISC Executive evaluating the regional pilots and subject centre strands of the Distributed e-learning programmes and synthesising the lessons learned by these projects. This report should:

- Evaluate the progress of the two strands towards achieving the aims of the Distributed e-learning programme (paragraph 7 above), identifying any significant gaps.
 - Provide an executive summary of the key messages emerging from the programme.
 - Provide a themed summary of the lessons learned, synthesising the outputs and outcomes of different projects. These lessons should be placed in the context of the lessons emerging from other relevant programmes (see paragraph 17 above.)
 - Point to key project outputs which can be used by the wider community.
 - Identify successful innovation or emerging good practice in technical, administrative or pedagogical systems and approaches which could be adopted or built upon by the wider community.
25. The full list of deliverables is as follows:
- An agreed detailed work plan two weeks after the start of the contract.
 - D1: an interim review of the work of the regional pilots and subject centre projects (D1), due on 2 December 2005.
 - A brief update report in late March 2006 outlining early plans for how to summarise lessons learned under appropriate themes
 - A draft final report in early June 2006
 - D2: a final evaluation and synthesis of the lessons learned by the projects, due in late June 2006
26. 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 the Higher Education Academy. However, the outputs 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.
 - 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.
27. Continuation of the study beyond the delivery of D1 is contingent on the report being accepted by the JISC executive. If JISC is unable to accept the report after the contractors have addressed any initial comments, the contract will be terminated, and the contractors will be paid only for the work they have carried out.
28. It is anticipated that the study will take approximately 80-100 days' work. The effort required is likely to be unevenly distributed throughout the length of the project, with periods of concerted effort at the start and end of the study. The individual or team selected must have the capacity and flexibility to be able to cope with this varying workload.
29. The person or team appointed will need to attend the JISC e-Learning Programme Meeting on 6-7 December 2005, to talk to the projects about their emerging lessons.
30. 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

31. The timescale is as follows:

- Bids should be submitted by 13:00 hrs on 22 September 2005.
- If necessary, the panel may need to interview shortlisted candidates. If this is the case, interviews will be held on 14 October 2005. Bidders will be invited for interview on or before 11 October 2005.
- It is expected that bidders will be notified of the outcome of the evaluation process in the week beginning 17 October 2005.
- The contractor will be expected to commence work on 24 October 2005 and to meet with JISC programme managers and to have agreed the project plan by 2 November.
- Please refer to paragraph 25 for the list of deliverables and deadlines.

Evaluation

32. 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. (35%). This includes:
 - the extent to which the proposal demonstrates an understanding of the objectives of the study (paragraph 16) and complies with the deliverables, timetable and other expectations (paragraphs 22-30)
 - the extent to which it demonstrates the knowledge and understanding required under paragraph 34 below.
- Quality of work plan and suitability of methodology in meeting the requirements. (30%).
- Relevance of previous experience of the tendering organisation(s) and of the particular consultants and/or researchers to the study. (20%)
- Analysis and management of risks to successful completion of the study. (5%)
- Value for money. (10%).

Funding

33. Funding for this study will be commensurate with the effort proposed in tenders. As a guideline, JISC estimates that the study will require around 80-100 days' effort. However, bidders are strongly encouraged to ensure that their proposal allocates sufficient time and therefore budget to meet the objectives and provide the required deliverables.

Proposals

34. Proposals should demonstrate the following:

- 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.
- Knowledge and understanding of the higher and further education sectors in the UK, including work in the area of student support and widening participation.
- 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, including estimates of the number of days' work each aspect of the work is likely to require.
- Details of personnel to work on the study, including CVs. (CVs should be included in an appendix and are not counted within the ten 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

35. 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.

Terms and Conditions of Grant

36. Contractors will be expected to follow the normal JISC project management guidelines (http://www.jisc.ac.uk/prof_info.html), adherence to good project management practices, regular reporting and participation in meetings as appropriate. JISC's Terms and Conditions of Grant (http://www.jisc.ac.uk/proj_togrants.html) must be adhered to by all projects. Bidders are advised to read these carefully prior to submitting a proposal. Specific project management guidance for projects can be found at http://www.jisc.ac.uk/proj_manguide.html
37. A general guide to bidding for JISC funds can be found at <http://www.jisc.ac.uk/bidguide/html> .

Submission

38. Proposals of no more than ten single sided A4 sheets, typeset in Arial or a similar font at 10 point size, should be submitted both as a single sided unbound hard copy. An electronic copy, in Word or Rich Text Format, should also be submitted by email as one file or a zipped folder. **The deadline for submissions is 1300 hrs on 22 September 2005. Both hard and electronic copies MUST arrive by the deadline.**
39. Proposals MUST also include the completed cover sheet at Appendix A to this invitation to tender, in addition to the ten page maximum bid. CVs may be attached as appendices to the 10 page limit but should be no longer than 2 sides of A4 each. If the bid exceeds the page limit guidance evaluators will be advised to disregard information provided beyond the indicated page limit.
40. Faxed or late proposals WILL NOT BE ACCEPTED. Bidders are advised **NOT to rely on first class post** for next day delivery of the hard copy.
41. Both email and hard copy of the proposals, including appendices, 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.
42. The JISC reserves the right not to accept the lowest (or any) tender received.

Further information

43. Any queries regarding this invitation to tender should be sent to Sarah Davies, JISC Programme Manager at JISC Bristol Office, phone: 07785 518564, email: sarah.davies@bristol.ac.uk.

Appendix A

Cover sheet for proposals

JISC Invitation to Tender: Evaluation of the distributed e-learning regional pilots and Higher Education Academy Subject Centre projects

(NB: All sections must be completed)

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