

JOINT INFORMATION SYSTEMS COMMITTEE

JISC Circular 05/06: Learner Experiences of e-Learning

18 October 2006

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

Principals of Further Education Institutions in England which teach higher education to more than 400 FTEs or funded by the Scottish Funding Council, the Department for Education, Lifelong Learning, and Skills (DELLS) in Wales and by DEL, Northern Ireland

**Of Interest To: Pro Vice Chancellors for (e)Learning and Teaching
Learning Technologists
Heads of e-Learning
ILT Managers
e-Learning / ILT Champions**

Introduction

1. The Joint Information Systems Committee (JISC) invites proposals from institutions for 'Learner Experiences of e-Learning' projects in order to develop further the community's understanding of how learners experience and participate in e-learning. This Programme builds on activities funded under the e-Learning and Pedagogy strand of the JISC e-Learning Programme.
2. Total funding of up to £720,000 is available for the areas of work outlined below.
3. The deadline for receipt of proposals is no later than **1.00 pm on Monday 4 December 2006**. Projects are expected to last between 18 months and 24 months. They should commence no later than 1 March 2007.

Eligibility

4. Proposals may be submitted by HE institutions funded via the UK funding bodies, FE institutions in England which teach higher education to more than 400 FTEs and by FE institutions in Wales, Scotland and Northern Ireland. Due to the funding streams available for this programme, English FE institutions not teaching HE to more than 400 FTEs are not eligible to bid but may be involved as partners to other projects.
5. Proposals may be from single institutions or consortia. Partnership arrangements may be developed outside the sector (for example with research council sites, publishers, commercial suppliers) but the lead body must be part of the FE or HE community as described above and funds can only be allocated through the lead site.

Background

6. JISC supports further and higher education by providing strategic guidance, advice and opportunities to use Information and Communications Technology to support teaching, learning, research and administration. JISC is funded by all the UK further and higher education and higher education funding councils.

7. 'Learner Experiences of e-Learning' builds on the work of the JISC e-Learning Programme which aims to identify how e-learning can benefit learners, practitioners and educational institutions, and advise on its implementation. Its goals are to achieve improved quality of learning in the UK through:
- Practitioners with confidence and skills in managing and facilitating e-learning in different contexts and with different pedagogical approaches.
 - A technical infrastructure that supports flexibility, diversity and extendibility
 - Easy access to high quality, flexible learning materials.
 - Effective and responsive e-learning policies, systems and structures in place at local, regional and national level.

An overview of the programme can be found at: www.jisc.ac.uk/elearning

8. The e-Learning Programme has funded a series of scoping and research projects focusing on the learner's experience of e-learning (Phase1)¹, under the Pedagogy strand². These projects have provided an overview of current research in this area and have also provided valuable insight into how learners across the further and higher education sectors view the use of technology for their learning and in their lives.
9. The vision for the Learner Experiences of e-Learning theme is to build on the previous work undertaken in this area and further the understanding of how learners experience and participate in e-learning in UK further and higher education. The theme aims to assist practitioners in supporting learners with different needs, experiences and preferences through the design of pedagogically sound learning activities.
10. Outputs from this theme will be used to assist those involved in the support of student learning (including practitioners, support staff and institutional managers) in providing more effective environments for learning, and to inform the further development of the JISC e-Learning Programme.
11. This circular is supported by a briefing document³. This document outlines the scope, definition and conceptual background to the Learner Experiences of e-Learning theme, and places the projects in the context of other projects currently being funded by JISC. It is essential that prospective bidders read this document before preparing their proposal.

Scope of the Programme

12. The Learner Experiences of e-Learning theme aims to:
- Review and investigate how learners experience and participate in learning in technology-rich environments.
 - Make recommendations for those involved in the support of student learning (including practitioners, support staff and institutional managers) on how best to support learners, based on our understanding of the diverse needs, experiences and preferences of learners.
 - Help developers to design systems that support a wide range of learning tasks/interactions, meet different learner needs and enable positive learning experiences.
 - Investigate the strategies, beliefs and intentions of learners who are effective in learning in technology-rich environments.

¹ For information on the projects funded under phase 1 of the Learner Experiences of e-Learning theme see www.jisc.ac.uk/elp_learneroutcomes.html

² Further details of the e-Learning and Pedagogy strand can be found at: www.jisc.ac.uk/elearning_pedagogy.html

³ See: www.jisc.ac.uk/circular0506_learner_experiences

- Develop methodologies for eliciting the learner experience and promote learner involvement in evaluations which practitioners can use to inform their designing for learning.
13. Projects which have been funded under Phase One are:
- Scoping, Support and Synthesis Study⁴: The scoping study reviewed current research in this area and made recommendations for the research questions and methodology to be undertaken by subsequent projects.
 - Learner Experience of e-Learning (LEX)⁵: The project has provided an insight into how learners view the use of technology for learning and as part of their everyday lives. Practical guides have been produced for a variety of stakeholders in the words of learners.
 - Experiences of e-Learning (exploring subject differences) Learner XP⁶: A joint project with the Higher Education Academy Subject Centres. Outcomes from this work include a better understanding of how learners from different disciplines use technology to support their learning.
 - The Learner's Voice⁷: A number of video clips have been produced in which learners from across the further and higher education sector speak about the role of technology in their learning and in their lives.
 - Synthesis and Support Project⁸: This project has synthesised key findings from all the projects funded under Phase 1 and has produced guidance materials for evaluating learner experiences of e-learning.
14. This circular invites proposals to the following projects:
- A) one **Learners' Journeys** project
 - B) up to six institutional projects on **Learners' Experiences of Blended Environments**;
 - C) one **Support and Synthesis** project.
15. Projects will be expected to build on the outcomes of the Learner Experiences of e-Learning Phase One projects as outlined in Section 13 above, and to liaise with concurrent projects where these are identified as relevant, including projects funded under the Design for Learning Programme⁹.
16. All projects will be asked to cooperate with the Support and Synthesis project in reflecting on specific issues arising and communicating lessons learned across the theme. This project will offer expertise to projects on methodology and tools for investigating learner experiences.
17. All projects funded under this theme will be expected to work together and share relevant information and project outcomes. Projects will be invited to present interim findings at meetings of the e-Learning and Pedagogy Experts Group, and will be required to use this as an opportunity for feedback on project progress and key issues arising.
18. Project teams will liaise with the JISC Programme Manager on a monthly basis to ensure there is a shared understanding of the work and its progress. This may take the form of email or phone contact. Regular feedback on reports, interim outcomes and work in progress will be provided by the Programme Manager and the expert consultant to the Pedagogy strand.
19. The theme is monitored by the Pedagogy Steering Group composed of members of the JISC Learning and Teaching committee. This includes observers from several key partner agencies. Final reports will be submitted to the Steering Group.

⁴ For further information on the Scoping, Support and Synthesis study, see www.jisc.ac.uk/elp_learneroutcomes.html

⁵ For further information on the Learner Experience of e-Learning (LEX) project, see www.jisc.ac.uk/elp_lex.html

⁶ For further information on the LearnerXP project, see http://www.jisc.ac.uk/elp_learnerxp.html

⁷ For further information on the Learner Voices project, see www.jisc.ac.uk/elp_learneroutcomes.html

⁸ For further information on the Synthesis and Support project, see www.jisc.ac.uk/elp_learneroutcomes.html

⁹ For information on the Design for Learning Programme, see www.jisc.ac.uk/elp_designlearn.html

Objectives, Deliverables and Requirements: by project

20. A) Learners' Journeys

20.1 This project will investigate the role that technology plays in individual learners' journeys through further and/or higher education. The investigation will work with institutions to identify appropriate learners and will look at aspects of the institutional experience such as induction, student support and learning approaches, from the learner perspective. However, it will also investigate learners' experiences beyond the institutional context. Sampling should be carried out to ensure a cross section of learners studying in different contexts, and should also include learners with disabilities and learners with different work/family commitments.

20.2 The objectives and requirements of this project are to:

- Identify not less than 30 learners suitable for longitudinal study; including learners with disabilities and learners with work/family commitments from across the further and higher education sector. At least five of the learners should be *highly skilled e-communicators*, i.e. should already have relevant skills, aptitudes and habits of online networking and information gathering, which they have not necessarily acquired through formal learning.
- Develop a methodology for longitudinal research, drawing on established investigative methods (e.g. those used during Phase One projects), to include at least three iterations of data collection per learner during the timescale of the project, and ideally to include one method of continuous data collection (e.g. blog, audio diary).
- Bidders are encouraged to address a small number of well focused research questions with a focus on the following issues:
 - How do learners *access* learning with technology, including ways not specifically supported by their institutions?
 - How do learners *describe* their experience of learning in technology-rich environments? Is there a relationship between their conceptions of learning and their success?
 - What critical *choices* do learners make in their use of technologies for learning? What *consequences* do these have in their personal journeys?
 - What *skills* do different learners bring to e-learning, including highly skilled e-communicators? How do their experiences differ?
 - What *barriers and difficulties* do different learners perceive in their learning with technologies? What *opportunities* do they perceive? How do their experiences differ (e.g. as a result of their disability, first language and culture, other demands on their time, their learning situation etc)?
 - How are learners *personalising* their learning tools and environments, and how are they involving 'personal' technologies in their learning? What kinds of personalisation and adaptation would they value in their learning?
- Identify strengths and weaknesses in the methodology chosen.

20.3 The deliverables of this project should include:

- A series of not less than 30 scenarios describing learners' individual journeys and the role technology plays in them;
- A summary report detailing how the scenarios shed light on the research questions, especially in relation to differences in learners' experiences;
- A short methodological report outlining the tools and techniques used, together with any tools developed and any transcripts produced (participant confidentiality should be maintained);
- A critique of the chosen methodology

- Recommendations and guidance for practitioners, support staff, institutional managers, learners and technical developers

20.4 This project will additionally be required to:

- Work closely with the Support and Synthesis project in developing appropriate methodologies and sharing ongoing findings;
- Run for a period not exceeding 24 months at a cost to the JISC not exceeding £120,000

21. B) Institutional projects: Learners' experiences of blended learning environments

21.1 Up to six institution-based projects will be funded which will gather learner experiences of e-learning across a range of disciplines, levels of study and types of technology (with emphasis on use of e-assessment; e-portfolios, social software and mobile learning) in blended environments in the further and higher education sectors.

21.2 The objectives of each project is to:

- Identify a group of learners for intensive study. Individual projects may choose to focus on a specific cohort or on users of a specific technology, or they may choose to study a representative sample. Up to six projects will be funded to ensure a range of disciplines, levels of study and types of technology.
- Develop a methodology to elicit a detailed picture of the learners' experiences of learning in a blended environment, drawing on established investigative methods (e.g. those used during Phase One projects).
- Bidders are encouraged to address a small number of well focused research questions with a focus on the following issues:
 - What *choices* are learners making in their study strategies e.g. about when and where to study, with whom, and using what technologies and services? How do these choices impact on their experience of e-learning?
 - What are the *critical moments* in learners' experience of technology for learning (e.g. induction, transition, key dialogues and collaborations?)
 - How do institutional (including departmental) *policies* facilitate access to technologies, and positive choices about learning with technology?
 - How well do institutional *systems* (human and technical) support different kinds of learner?
 - How are *highly skilled e-communicators* being supported? What can be learned from their experience?
 - How are learners *personalising* their learning tools and environments, and how are they involving 'personal' technologies in their learning? What kinds of personalisation and adaptation would they value in their learning?
- Briefly evaluate the methodology chosen for strengths and weaknesses.

21.3 The deliverables of each project should include:

- A series of case studies describing learners' different experiences and the role technology plays in them. The Support and Synthesis project will provide guidance on developing suitable templates to capture learner views.
- A summary report detailing how the research questions have been addressed and drawing out lessons learned from the particular institutional context;
- A brief methodological report outlining the tools and techniques used, together with any tools developed and any transcripts produced (participant confidentiality should be maintained);
- A critique of the chosen methodology;
- Recommendations and guidance for practitioners, support staff, institutional managers, learners and technical developers

21.4 Each project is required to:

- Clearly indicate the research questions that will be addressed and how the methodology will enable them to be investigated. (Note that while comparative studies are always of interest, bids are welcome that elaborate qualitatively on a single institutional context that has been proven to support successful e-learning.)
- Draw on the methodologies developed and outcomes of the Phase One projects;
- Work closely with the Support and Synthesis project in developing appropriate methodologies and sharing ongoing findings;
- Run for a period of 18-24 months at a cost to the JISC not exceeding £80,000 per project.

22. C) Support and Synthesis project

22.1 A support and synthesis project will support and work with the projects in the programme to recommend appropriate methodologies and sampling and evaluation techniques; and to synthesise key findings from the projects and develop guidance materials and recommendations for the wider community.

22.2 The objectives of the project are to:

- Provide expert guidance to the Learner Experiences of e-Learning projects on methodology and tools used to evaluate learner experiences.
- Provide expert guidance to related projects in the JISC e-Learning Programme which are evaluating learners' experience of technologies.
- Establish, maintain and facilitate an online community to enable collaboration between projects and the sharing of project outcomes.
- Undertake the ongoing synthesis of key findings from projects in the programme and produce a final synthesis report.
- Produce recommendations for JISC to inform other areas of the e-Learning Programme including technical development projects.
- Develop and run a series of workshops, in partnership with the Higher Education Academy, on learner experiences of e-learning. The workshops will present synthesised findings on learner experiences and address how participants could undertake smaller-scale studies evaluating learner experiences. Produce supporting guidance materials for the workshops.
- Develop and run a workshop for JISC Development projects on evaluating learner experiences, with production of supporting guidance materials.

22.3 The deliverables of this project should include:

- Evidence of ongoing support, collaboration and guidance to the Learner Experiences of e-Learning projects, via an online community of practice.
- A synthesis resource for print and web-based access of the key findings and recommendations from the projects in the programme together with the guidance materials produced.
- Guidance materials for practitioners, support staff, institutional managers and technical developers on evaluating learner experiences of e-learning for print and web-based access.
- Recommendations for future work in this area for the JISC e-Learning Programme.
- A series of workshops and workshop materials synthesising the findings of learner experiences together with guidance on evaluating learner experiences of e-learning.
- A workshop for JISC projects and supporting guidance materials on evaluating learner experiences of e-learning.

22.4 The project is required to:

- Draw on the methodologies developed and outcomes of the Phase One projects;
- Work closely with all projects funded under this programme and projects funded in the JISC e-Learning Programme evaluating learner experiences.
- Work closely with JISC partners (for example, Becta and the Higher Education Academy) to ensure synergy of activities in this area.
- Demonstrate expertise and knowledge of e-learning developments in the further and higher education.
- Run for the lifetime of the Programme i.e. for two years, at a cost to the JISC not exceeding £120,000.
- Represent the JISC e-Learning Programme's work in this area at relevant conferences and events as appropriate.

Evaluation Criteria

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

- **Quality of the proposal and work plan** - the extent to which the proposal addresses the issues and demands outlined in the circular – including how the proposed methodology will address the key research questions – and shows innovation as appropriate; 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 (35%).
- **Impact** – the extent to which the project outcomes will be of overall value to the JISC community (30%).
- **Partnership and dissemination** – the degree to which the proposal demonstrates an openness and willingness to work in partnership with related projects and JISC in forward planning, dissemination and evaluation (10%).
- **Previous experience of the project team** – evidence of the project team's understanding of the pedagogical 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 (15%).
- **Value for money** – the value of the expected project outcomes vis-à-vis the level of funding requested, taking into account the level of innovation, chance of success and relevance to the target communities (10%).

Structure of Proposals

24. The content of the proposal should reflect the evaluation criteria as set out above. To assist in the assessment of all proposals against a common baseline, proposals should be structured as follows:

- a. **Cover Sheet** – All proposals must include a completed cover sheet. This can be found at Annex A. The completed cover sheet will not count towards the page limit.
- b. **Introduction** – A brief outline of the nature of the work to be undertaken, the length of the project, start and end dates, and a summary of how the project will contribute to the theme.
- c. **Project Description** – A description of the intended project plan, timetable and deliverables, risks and an explanation of how the detailed project outcomes will be of value to the JISC community. Proposals should also include statements regarding IPR and sustainability issues.
- d. **Budget** – A summary of the proposed budget which in broad outline identifies how funds will be spent over the life of the project. The budget should be broken down across academic years (August – July) or parts thereof and should include itemised staff costs, any equipment and consumables, travel and subsistence, dissemination, evaluation, and any other costs required. All costs must be justified.

TRAC methodology must be used to calculate costs in bids from UK HEIs with institutional contributions determined by taking in to account the benefits to the lead institutions and any project partners. Bidders should provide a summary of the qualitative and any quantitative benefits the lead institution and any project partners expect to receive from the project, in order to inform the funding requested from JISC and the costs being borne by the host institution and any project partner. An example budget and guidance on the budgetary terms used can be found at Annex C. Non HEIs should use their institution's normal costing methods to determine any indirect costs.

- 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 a similar nature successfully completed. Clearly indicate where posts will need to be advertised.
 - f. **Supporting Letter** – A copy of the letter/s of support from a senior representative of the institution and any partners. The supporting letter/s will not count towards the page limit.
25. Proposals should not exceed six single sides of A4 pages and should be typeset in Arial or a similar font at 10 point size. All key information as outlined above in paragraph 24 **MUST** be included within the six page limit unless otherwise indicated. CVs may be included as appendices but should be no longer than one side of A4 each. The evaluators will discount any information provided beyond the indicated page limit and additional CVs.
26. Proposals **MUST**:
- include a completed cover sheet (see Annex A),
 - include a completed FOI Withheld Information form (see Annex B)
 - be accompanied by a letter from an authorised senior manager at the lead institution and from any partner institutions.

Full Economic Costs

27. With effect from 1 August 2006 the Funding Councils have agreed that JISC should adhere to the principles of full economic costs (fEC) for all new projects funded in UK HEIs. Bids should therefore be constructed on a full economic cost (fEC) basis using the Transparent Approach to Costing (TRAC). The bid should indicate the contribution to the project being sought from JISC and the contribution that the lead institution and any project partners intend to contribute. The funding levels outlined in this call are the maximum that JISC will provide towards the total cost of a project; institutional contributions are additional. Non UK HE bidders or partners should cost their activities using current costing practice in their college or organisation and clearly identify partner contributions.
28. When assessing proposals markers will take into consideration the reasonableness of the total cost of the project and the institutional contributions. It is important to JISC that institutions are costing proposals accurately and seeking the appropriate level of support so that they are not over-committed and hence are ensuring the long-term availability of their activities. However we also need to ensure consistency of treatment, and that we are using our funding effectively across all proposals.
29. Through the funding provided in this circular there will clearly be sector-wide benefits. However there may also be benefits to the lead institution and any project partners (e.g. prestige/kudos, academic synergy, financial) delivering the individual projects. Bidders should provide a summary of the qualitative and quantitative benefits the lead institution and any project partners as a whole expect to receive from the project. JISC expects these benefits to be taken into account when considering the funding requested. JISC reserves the right to ask additional questions about the budget prior to agreeing any funding for a project.

30. For more information about TRAC, see the HEFCE web site at <http://www.hefce.ac.uk/finance/costing>. The consolidated TRAC guidance can be found at <http://www.jcpsg.ac.uk/guidance>.

Freedom of Information

31. JISC is subject to the Freedom of Information Act 2000 (FOIA). Therefore potential bidders should be aware that information submitted by them to JISC during this tender process and throughout the life of any project subsequently funded may be disclosed upon receipt of a valid request.
32. JISC will not disclose any information received during this tender process whilst the evaluation of the bids received is still underway. The evaluation process is still deemed to be active until such time as all grant letters to successful projects have been sent out.
33. It is JISC policy to make the content of any bid funded by JISC publicly available via the JISC web site shortly after funding has been awarded. Unsuccessful bids will be destroyed one month after the lead institution has been notified that their bid was not successful. However it should be noted that the contents of unsuccessful bids may be disclosed should JISC receive a relevant FOI request prior to destruction.

Terms and Conditions of Grant

34. JISC will oversee and monitor the progress of projects. All projects will be expected to follow JISC's Terms and Conditions of Grant. These can be found at (http://www.jisc.ac.uk/proj_tocgrants.html). It is the bidders' responsibility to read these.
35. All projects will be managed following JISC's project management guidance which can be found at http://www.jisc.ac.uk/proj_manguide.html.
36. 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.

Intellectual Property Rights

37. 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. Where JISC is funding the creation of a national service for the community there may be a need for HEFCE, (on behalf of JISC's funding partners), to retain ownership of certain rights in order to maintain flexibility of future provision and availability of the service.
38. It is highly desirable that any software components of the deliverables are released under appropriate open source licences to ensure that they can also be freely shared with organisations and communities with which the JISC has close working arrangements. Bidders should refer to JISC's Open Source Policy http://www.jisc.ac.uk/about_opensource_policy.html. JISC also funds an open source software advisory service (OSS Watch) for the community. For other outputs such as reports or model strategies, a non-exclusive licence allowing JISC or its representative

to utilise, archive and disseminate the work will be required.

Jorum

39. Jorum is a free online repository service for teaching and support staff in UK Further and Higher Education Institutions, allowing them to collect and share learning and teaching materials. Jorum is helping to build a community for the sharing, reuse and repurposing of learning and teaching materials and stands as a national statement of the importance of creating interoperable, sustainable materials. Where projects produce learning materials, case studies and staff development materials as part of their deliverables, these must be deposited in Jorum, and bidders should familiarise themselves with the guidance for depositing institutions. This and other information for bidders on Jorum is available at http://www.jisc.ac.uk/proj_jorumbackground.html.

Accessibility Issues

40. In line with Government legislation and social exclusion initiatives, JISC is committed to providing resources that are accessible to a diverse range of users. In order to achieve this all software and IT resources including the project website should meet good practice standards and guidelines pertaining to the media in which they are produced.
41. Advice and recommendations for ensuring that IT-based systems, tools and resources are accessible by all can be found in the resource section of the TechDis Service web site (www.techdis.ac.uk). Further advice and consultancy is available from the TechDis Service.

Bidding Process

41. A guide to bidding for JISC projects can be found at: <http://www.jisc.ac.uk/bidguide.html>.
42. **The deadline for submissions is 1200 noon on Monday 4 December 2006. Late proposals will NOT be accepted.**
43. **An electronic copy of the proposal should be sent in PDF format** to Georgia Slade (email: g.slade@jisc.ac.uk) by this deadline. This is an electronic-only submission process; therefore all documentation (including letters of support) must be submitted in PDF format, as a single file or in a zipped folder. No additional security settings should be activated for PDFs to allow JISC to redact information if necessary prior to release under FOI.
44. Bids in response to this call for projects should be sent to g.slade@jisc.ac.uk. The subject of the email should include the name of the lead institution and "**A) Learners' Journeys project** or **B) Institutional projects: Learners' experiences of blended learning environments** or **C) Support and Synthesis project**, as appropriate. If more than one bid is submitted by an institution, these must be submitted in separate messages.
45. All proposals must complete the *FOI Withheld Information form* (see Annex B) indicating those sections or paragraphs of your proposal which you believe should be exempt from disclosure under the Freedom of Information Act. It should be noted that whilst JISC will actively consider withholding any of the information indicated within this appendix, it is ultimately JISC's decision (as the holder of the information) and may not be able to uphold such decisions in all cases. JISC will consult the lead institution prior to the release of any information listed in the *FOI Withheld Information form*.
46. The types of information which may be considered exempt from disclosure include (but may not necessarily be limited to):

- information which if disclosed would materially damage the commercial interest of the institutions or its partners:
 - Information which if disclosed would break the principles of the Data Protection Act 1998.
47. Bidders are encouraged to consult with their institutional FOI officer for further information if required. Failure to fill in or submit this information will be construed as consent for disclosure.
 48. Bidders submitting more than one bid in response to this call should submit these in separate messages. In the case of any dispute about the submission of proposals, it is the responsibility of the bidder to provide evidence that the proposal was emailed to the above address prior to the deadline.
 50. A selection panel will be established to review the bids received. Short listed applicants may be invited to give a presentation to the selection panel on a date to be agreed during the week beginning 22 January 2007. JISC will endeavour to notify all bidders of the outcome of the process by 31 January 2007.
 51. 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 circular 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 highest raw scores will be those funded in all instances.
 52. The JISC reserves the right not to any award funding.

Further Information

53. All general enquiries regarding this circular should be sent to Paul Bailey, Programme Manager, JISC Executive, University of Bristol, Beacon House, Queens Road, Bristol, BS8 1QU. Tel: 07789 721150. Email: p.bailey@jisc.ac.uk
45. Any enquiries regarding the proposal submission process should be sent to Georgia Slade (tel: 0117 931 7385: email: g.slade@jisc.ac.uk).

October 2006

**JISC Executive
Northavon House
Coldharbour Lane
Bristol
BS16 1QD**

Annexes

Annex A Cover Sheet
Annex B FOI Withheld Information Form
Annex C Budget Template

Annex A

| | |
|--|---|
| Cover Sheet for Proposals to Circular X/06: Learners Experience of e-Learning Programme (All sections must be completed) | Bid for a: *A) The Learners' Journeys project; *B) Institutional Studies project; *C) Support and Synthesis project; * <i>Delete as appropriate</i> |
|--|---|

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|--|
| Name of Institution/Organisation: |
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| |
|-------------------------|
| Name of Partners |
|-------------------------|

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|----------------------------------|
| Name of Proposed Project: |
|----------------------------------|

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| Full Contact Details for Primary Contact: Name: Position: Email: Address: Tel No: Fax No: |
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|---------------------------|
| Length of Project: |
|---------------------------|

| |
|-------------------------------------|
| Project Start and End Dates: |
|-------------------------------------|

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| Total Funding Requested from JISC: |
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| Funding Broken Down over Academic Years: |
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| Total Institutional Contribution: |
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|------------------------------------|
| Outline Project Description |
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Annex B

FOI Withheld Information Form

We would like JISC to consider withholding the following sections or paragraphs from disclosure should the contents of this proposal be requested under the Freedom of Information Act.

We acknowledge that the FOI Withheld Information Form is of indicative value only and that JISC may nevertheless be obliged to disclose this information in accordance with the requirements of the Act. We acknowledge that the final decision on disclosure rests with JISC.

| Section / Paragraph No. | Relevant exemption from disclosure under FOI | Justification |
|--------------------------------|---|----------------------|
| | | |
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Please see <http://www.ico.gov.uk> for further information on the Freedom of Information Act and the exemptions to disclosure it contains.

Example:

| Section / Paragraph No. | Relevant exemption from disclosure under FOI | Justification |
|--------------------------------|---|--|
| 2.4 | s.43 Commercial Interests | Contains detailed description of our proposed system design which would damage our commercial interests if disclosed by making this information available to competitors |

Annex C Example Budget¹⁰

| | | | | |
|--|------------------------|----------------------------|----------------------------|-------------------|
| Directly Incurred Staff | March – July 07 | August 07 – July 08 | August 08 – July 09 | TOTAL £ |
| Post, Grade & % FTE | £ | £ | £ | £ |
| Etc. | £ | £ | £ | £ |
| Etc. | £ | £ | £ | £ |
| Total Directly Incurred Staff (A) | £ | £ | £ | £ |
| Non-Staff | | | | |
| Non-Staff | March – July 07 | August 07 – July 08 | August 08 – July 09 | TOTAL £ |
| Travel and expenses | £ | £ | £ | £ |
| Hardware/software | £ | £ | £ | £ |
| Dissemination | £ | £ | £ | £ |
| Evaluation | £ | £ | £ | £ |
| Other | £ | £ | £ | £ |
| Total Directly Incurred Non-Staff (B) | £ | £ | £ | £ |
| Directly Incurred Total (A+B=C) (C) | £ | £ | £ | £ |
| Directly Allocated | | | | |
| Directly Allocated | March – July 07 | August 07 – July 08 | August 08 – July 09 | TOTAL £ |
| Staff | £ | £ | £ | £ |
| Estates | £ | £ | £ | £ |
| Other | £ | £ | £ | £ |
| Directly Allocated Total (D) | £ | £ | £ | £ |
| Indirect Costs (E) | £ | £ | £ | £ |
| Total Project Cost (C+D+E) | £ | £ | £ | £ |
| Amount Requested from JISC | £ | £ | £ | £ |
| Institutional Contributions | £ | £ | £ | £ |
| Percentage Contributions over the life of the project | | JISC X % | Partners X % | Total 100% |

¹⁰ See overleaf for an explanation of the terms directly incurred, directly allocated and indirect costs.

Explanation of Terms

All applications from UK HE institutions for development funding from JISC should be costed on the basis of full economic costs (fEC). fEC is the total cost of a project. All applications should be costed on an academic year basis ie August – July.

Cost Headings

Directly Incurred

These are costs that are explicitly identifiable as part of the project, are charged at cash value actually spent and can be supported by an audit record. They include:

Staff – payroll costs requested for staff, full- or part-time, who will work on the project and whose time can be supported by a full audit trail during the life of the project.

Travel and Expenses – funds for travel and subsistence for use by staff who work on the project where these are required by the nature of the work. This should include attendance at programme meetings (two per year) and other relevant meetings dependent upon the project/programme.

Equipment – the cost of individual items of hardware or software dedicated to the project, including VAT, e.g. a computer for a newly recruited member of staff for the project.

Dissemination – the cost of any dissemination activities proposed for the project.

Evaluation – the cost of any formative or summative evaluation activities proposed for the project.

Other Costs – costs of other items dedicated to the project, including consumables, recruitment and advertising costs for staff directly employed on the project.

Directly Allocated

These are the costs of resources used by a project, which are shared by other activities. They are charged to projects on the basis of estimates rather than actual costs and do not represent actual costs on a project-by-project basis. They include:

Staff – proposals will need to show the costs of any principal investigators/project directors and any co-investigators/co-directors if their time charged to the project is based on estimates rather than actual costs. This may also include the costs of technical and clerical staff and if a project is buying a small amount of one or more of a person's time.

Estates – these costs may include building and premises costs, basic services and utilities, and any equipment maintenance or operational costs not already included under other cost headings.

Other Directly Allocated – these costs may include, for example, access to institutional research facilities such as equipment and IT systems.

Indirect Costs

These include non-specific costs charged across all projects based on estimates that are not otherwise included as Directly Allocated costs. They include the costs of administration, such as personnel, finance, library and some departmental services.

Indexation

Costings for subsequent years should factor in inflationary increases for salaries and other costs. All costings should be inclusive of any VAT applicable.

Project Partners

Funding for project partners, e.g. staff time, should be clearly identified in the proposal under the relevant heading. Resources to be provided by project partners, whether cash or in-kind contributions, should also be clearly identified in the proposal.

Justification of Costs

All costs associated with the project must be fully justified.