



JISC Grant Funding 18/11

JISC and HEA Open Educational Resources Programme: Rapid Innovation Strand: Call for Projects

November 2011

Of Interest To: Pro Vice Chancellors for (e)Learning and (e)Research
Directors of Information Services and Systems
Learning Resource Managers, Librarians and Archivists
Principal Investigators in Research Teams
Learning Technologists
Heads of e-Learning and ILT Managers

Introduction

1. The Joint Information Systems Committee¹ (JISC) and the Higher Education Academy (HEA) invites institutions to submit funding proposals for Projects to enhance digital infrastructure to support open content for education.

Programme/ Initiative	Theme / Context	Description	Funds
OER Rapid Innovation	Open educational resources digital infrastructure	Rapid Innovation projects to enhance digital infrastructure to support open content for education	Between £10,000 and £25,000 per project A total of £200,000 is available for this strand. Between 10 and 18 projects are likely to be funded.

2. The deadline for receipt of proposals in response to this call is 12:00 noon UK time on Friday 27th January 2012.

3. Funding is available for projects starting from Monday 19th March 2012 for 4-6 months. All projects must be complete by Friday 19th October 2012 at the latest. Earlier finish dates are very welcome.

4. These are Rapid Innovation projects. The benefits of this approach are described in "Why Rapid Innovation?"² In keeping with the size of the grants and short duration of the projects, the bidding process is lightweight (see the Bid Form) and the reporting process will be blog-based.

5. Opportunities for questions and discussion about the Call:

¹ Further information on JISC is available at: <http://www.jisc.ac.uk>

² <http://ie-repository.jisc.ac.uk/451/1/OBC.pdf>

- a. Bidders are welcome to use the oer-discuss mailing list³ to refine ideas and identify potential collaborators. JISC will not provide a matchmaking service, but commercial and overseas experts are welcome to use the mailing list to express an interest in collaborating.
- b. We are holding an optional community briefing event where potential bidders will be given information about the background to the call, its objectives and the bidding process. Attendees will also have an opportunity to ask questions of executive staff. This meeting will take place at **Friday 9th December, 10:00-12:00 via the BB Collaborate platform**. Participants may join at: <http://bit.ly/riYLzE> from 09:45 (but no earlier please). A recording of the briefing will be made available after the event at: <http://bit.ly/tJuzpX>. The system used for this online briefing event will be Elluminate Live! and anyone intending to attend is strongly advised to view the hardware and software requirements for this system at <http://www.illuminate.com/support>.
- c. In addition to the above, the Programme Manager will be available to bidders via skype and telephone, all day on Wednesday 11th January. Enquiries are very welcome in the meantime.

Eligibility

6. Proposals may be submitted by Higher Education (HE) Institutions funded by HEFCE. FE institutions in England that teach HE to more than 400 FTEs are also eligible to bid provided proposals demonstrate work that supports the HE in FE agenda. HE and FE institutions in Northern Ireland, Scotland and Wales are not eligible to bid but may be involved as partners in proposals led by HE institutions funded by HEFCE or FE institutions in England which meet the criteria outlined above.
7. Proposals may be from single institutions or consortia unless indicated otherwise in the relevant call. Partnership arrangements may be developed outside the sector (for example with research council sites, publishers, commercial suppliers), but the lead partner must meet the criteria outlined above. Funds can only be allocated through the lead partner.

³ www.jiscmail.ac.uk/oer-discuss

Background

The JISC and HEA OER Programme

8. JISC supports higher and further education by providing strategic guidance, advice and opportunities to use Information and Communications Technology (ICT) to support research, teaching, learning and administration. JISC is funded by all the UK post-16 and higher education funding councils.
9. The HEA works with universities and colleges, discipline groups, individual staff and organisations to support them in delivering the best possible learning experience for all students. It does this through five strategic aims, which are to:
- Identify, develop and disseminate evidence-informed approaches
 - Broker and encourage the sharing of effective practice
 - Support universities and colleges in bringing about strategic change
 - Inform, influence and interpret policy
 - Raise the status of teaching.
10. JISC and the HEA have previously run two year long OER programmes: the UKOER pilot programme in 2009-10, and Phase 2 in 2010-11. This work has involved over 90 UK institutions releasing open educational resources, alongside associated work around support and guidance. Details of the main findings of this work can be found within the JISC InfoNet OER Infokit⁴.
11. Earlier this year, the Department of Business, Innovation and Skills' Online Learning Task Force recommended that HEFCE make further investments around OER. As a result of this, JISC and the HEA have been invited to develop a further year-long funded programme, OER Phase 3⁵. This grant funding call represents a component of the programme. An initial funding call has already been published and , other components will be released throughout the year.
12. Between 1st October 2011 and 31st September 2012 through the **OER Programme** JISC and HEA intends to fund projects and activities that help to address **key strategic and thematic priorities** whilst building on the lessons learnt within the first two OER Phases.
13. Anticipated outputs and outcomes across the **OER Programme** include:
- Open practice further embedded into individual practice, institutional processes and wider academic life.
 - Enhanced availability of discoverable, reusable and repurposable academic open content.
 - Further understanding of the issues raised by open practice and open content in further and higher education and possible approaches to addressing these issues.
14. Phases One and Two of the OER Programme have so far involved over 90 institutions in England and Wales. They have covered a wide range of discipline areas, models of release, and resource types.

⁴ <http://bit.ly/oerinfokit>

⁵ <http://www.jisc.ac.uk/whatwedo/programmes/ukoer3.aspx>

15. Experiences of the projects have been captured in their blogs and reports⁶ and synthesised by an independent expert team⁷. They have also been analysed by a study on the use of OER⁸ and a literature review of learners' use of online learning resources⁹.

16. The key issues that bidders should be aware of are

- a. Based on the findings of the first two Phases of work, we now conceptualise open educational resources as a component of a wider field of “**open academic practice**”, encompassing the many ways in which higher education is engaging and sharing with wider online culture.
- b. Contributing to the wealth of **open content “commons”** is a major motivator for many academics who make their content available for free online, and making that practice sustainable at an individual and institutional level is one of the challenges of OER.
- c. Open content can be used by anyone, and therefore presents a challenge to current **best practices in materials development**. However our experience with past projects has shown that OER has the best chance of being used and usable if the content is designed for easy discovery and use by an identified user or stakeholder group.
- d. Changing personal and institutional academic practices is always complex, and the HE Academy's **Change Academy**¹⁰ provides approaches to managing the transition to these new ways of working.
- e. There is a strong connection between OER practices and digital literacies, both for providers and users of open content. It is anticipated there will be some intersects with the JISC **Digital Literacies Programme**¹¹.
- f. There is no one-size fits all for the best approach to OER use, and our projects have shown a wide range of models: from collaborative wikis to purposely commissioned content, to podcasts, to online learning modules. In addition the extent to which academics will be receptive to ideas of OER depends on their discipline area, career stage, and personal working styles. Every project finds its own approach so needs to be informed by the experiences of others. The OER Infokit¹² is designed to step participants in OER through those considerations.

17. In summary, there are many ways that OER approaches can be used, and between October 2011 and October 2012, we intend to fund projects targeted at addressing key strategic and thematic priorities whilst building on the lessons learnt within the first two OER Phases.

18. A number of projects for Phase 3 have already been funded¹³

⁶ <http://www.netvibes.com/ukoer#oer2>

⁷ <https://oersynth.pbworks.com/>

⁸ <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer2/oerimpact.aspx>

⁹ <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer2/LearnerVoice.aspx>

¹⁰ <http://www.heacademy.ac.uk/change>

¹¹ <http://www.jisc.ac.uk/developingdigitalliteracies>

¹² <http://bit.ly/oerinfokit>

¹³ <http://www.jisc.ac.uk/whatwedo/programmes/ukoer3.aspx>

19. The OER Programme has deliberately taken a pluralistic and inclusive approach to what constitutes “OER”. The technical and legal requirements on projects releasing content developed under the HEA/JISC Programme are reproduced below for ease of reference:

- We would expect all projects to set up and maintain an easily identifiable discovery point for “their” resources, attractive to and usable by human browsers and machine interfaces. This should include suitable interfaces to allow repositories and aggregators to harvest metadata, allowing for the materials to gain greater exposure. This may be on their own managed site, or via a web 2.0 service.
- Projects should also submit their resource collections to one or more national or international OER/OCW aggregator or repository.¹⁴
- Resources should be made available under a suitable Creative Commons license allowing for reuse and repurposing. Previous Phases of the programme have developed a range of detailed advice around these licensing issues.¹⁵
- The first two Phases of OER work have learnt a great deal about the technical aspects of releasing and collecting materials. We would expect projects to build on what has been learnt, as detailed in the OER infokit¹⁶ and recorded by CETIS¹⁷. One key example would be the guidance provided by CETIS to Phase Two¹⁸,
- As with previous phases, a full range of support for projects will be made available, and we will be also working with the Open University SCORE¹⁹ project as an additional source of guidance and expertise. We would also expect to see projects making use of various media for dissemination and engagement with subject and OER communities, including via project blogs and twitter (tag: ukoer)

20. This guidance has been reviewed for Phase Three²⁰ and additional emphasis placed on: e-book formats, resource description (machine- and human-readable), feeds (RSS and OAI-PMH), tagging, usage tracking and activity data.

Aims of this Rapid Innovation Projects Strand

21. Intended **benefits** of these projects are:

- A clearly identified use case will be met by the solution provided;
- Increased understanding about how to identify and implement digital infrastructure solutions to support open content for education
- An informed developer community, more aware of the target groups they are developing for;
- Enhanced capacity, knowledge and skills to enable positive and informed change in the sector (through piloting new technologies and approaches)
- Ideas for new or enhanced services, infrastructure, standards or applications that may be used at departmental, institutional, regional or national levels.

¹⁴ Examples include but are not limited to OCWC, Jorum, WikiEducator, Xpert, OER Commons.

¹⁵ <http://www.web2rights.com/OERIPRSsupport/>

¹⁶ <http://bit.ly/oerinfokit>

¹⁷ http://wiki.cetis.ac.uk/Open_Educational_Resources

¹⁸ <http://blogs.cetis.ac.uk/lmc/2009/03/30/metadata-guidelines-for-the-oer-programme/>

¹⁹ <http://www8.open.ac.uk/score/>

²⁰ <http://blogs.cetis.ac.uk/lmc/2011/11/24/ukoer-3-technical-reflections/>

22. The projects funded under this Call contribute to the JISC strategy objectives²¹ in particular
- Addressing the complex issues associated with access to different types of resources and overcoming barriers to use
 - Provision of the infrastructure necessary to manage, share, discover, access and preserve digital content
 - Development of the infrastructure to support the open sharing of content, supported by appropriate business models
 - Investigation and exploitation of technologies to support resource discovery, such as semantic web and personalisation
23. Successful bidders to this strand will be expected to engage with other projects in the OER Programme²² and in some cases with other initiatives.
24. Bidders should note the requirement detailed in the Bid Form to produce a Use Case²³ to accompany the proposal. These use cases must be made available as Creative Commons BY SA. Please see examples of Use Cases²⁴.

Digital infrastructure to support open content for education: opportunities and challenges

25. The OLnet initiative has recently identified Key Challenges for the OER Movement²⁵. These challenges include:
- a. How can we improve access to OER?
 - b. What are the issues surrounding Copyright and Licensing and how can they be overcome?
 - c. What technologies and infrastructure are needed/in place to help the OER movement?
26. It is these global challenges that underpin this Call for projects to enhance the digital infrastructure to support open content.
27. Through the JISC Digital Infrastructure Team, JISC supports the creation and use of a layer of scholarly resources for education and research across the network. This includes the development of infrastructure, technology, practice and policy to support processes from creation and access to re-use of resources. Major activities include sharing and storing content, providing access to content (via licences and technologies), developing solutions for curation and delivering data and content resources via data centres and distributed solutions.
28. Through the OER Technology Support Project²⁶, the OER IPR Project²⁷, the evaluation and synthesis, and the experiences of funded projects, and aided

²¹ <http://www.jisc.ac.uk/media/documents/aboutus/strategy/strategy1012.pdf> p19

²² www.jisc.ac.uk/oer

²³ http://en.wikipedia.org/wiki/Use_case

²⁴ <http://obd.jisc.ac.uk/navigate>, <http://sconulerm.jiscinvolve.org/wp/>,

<http://www.jisc.ac.uk/whatwedo/programmes/einfrastructure/eius.aspx>,

<http://www.jisc.ac.uk/whatwedo/programmes/inf11/resdis/automaticmetadata.aspx>

²⁵ <http://olnet.org/node/639>

²⁶ http://wiki.cetis.ac.uk/Educational_Content_OER

particularly by JISC CETIS's technology synthesis work²⁸, JISC is developing a clearer understanding of the role of technologies and infrastructure in supporting open practice and open content.

29. In particular JISC has funded a number of elements that support the sharing of learning materials including Jorum²⁹, the Repositories Infokit³⁰, previous rapid innovation funding for the Xpert search³¹, the SWORD protocol³², the CaPRet project³³ and an OER Programme-funded prototype showcase of UKOER content that is currently under development.

30. **There are some key areas that JISC has identified where developments under this call are encouraged. What follows is a description of some of the opportunities and challenges that have been identified in this space. However this list is not exhaustive and BIDDERS ARE WELCOME TO SUBMIT PROPOSALS THAT ADDRESS DIFFERENT AREAS IF THEY FULFIL THE MAIN AIMS OF THE CALL.**

31. **Open licensing** is key to open content, and fertile ground for developing digital infrastructure. Tools built around Creative Commons licences may provide a useful backbone, so the Open Attribute³⁴ tool and projects using those conventions, such as OERGlue³⁵ and CaPRet³⁶ are useful in that they provide benefits to users (easy attribution) rewarded by benefits to content providers (analytics). Tools such as Xpert Attribution Tool³⁷ help the flow of rights. Implementation of Open Attribute into tools and services, and a set of services around embedded licenses are potential areas that proposals could tackle.

32. Improved **resource description**, both machine-readable and human-readable are important to enable content to be effectively found, shared and selected. CETIS have provided a summary of the key initiatives to track³⁸, namely Learning Resources Metadata Initiative³⁹ which is a profile of the schema.org⁴⁰ initiative for improving html markup. HTML5 may offer promise in this area. Including provenance and licensing information in the sharing of resources is important to digital literacies as well as meeting the requirements of attribution such as in the Creative Commons BY clause.

33. **Aggregation and discovery** is another area of interest for open content⁴¹. The OER Thematic Collections⁴² projects have explored a range of approaches. The Content Clustering and Sustaining Resources⁴³ publication provides a good description of the approaches in this area

²⁷ <http://www.web2rights.com/OERIPRSupport/>

²⁸ <http://blogs.cetis.ac.uk/johnr/2011/08/26/ukoer2techsynthesis/>

²⁹ www.jorum.ac.uk

³⁰ <http://www.jiscinfonet.ac.uk/infokits/repositories>

³¹ <http://www.nottingham.ac.uk/xpert/>

³² <http://swordapp.org/>

³³ <http://capret.mitoeit.org/>

³⁴ <http://openattribute.com/>

³⁵ <http://www.oer glue.com/>

³⁶ <http://capret.mitoeit.org/>

³⁷ <http://www.nottingham.ac.uk/xpert/attribution/>

³⁸ <http://www.slideshare.net/philb/jisc-cetis-and-ukoer3>

³⁹ <http://www.lrmi.net/>

⁴⁰ <http://www.schema.org/>

⁴¹ <http://infteam.jiscinvolve.org/wp/2011/03/29/oeragg/>

⁴² <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer2.aspx>

⁴³

<http://www.jisc.ac.uk/publications/generalpublications/2011/08/ContentClusteringAndSustainingDigitalResources>

generally. The Shuttleworth-funded OER Roadmap Project⁴⁴ proposes an ecosystem of repositories and services, characterised by the use of APIs and shared protocols such as JISC-funded SWORD⁴⁵. The Discovery Initiative⁴⁶ promotes an open metadata ecology to enable better use and aggregation of content. The Learning Registry approach⁴⁷ explores the use of activity data to enhance the metadata and discovery of resources and the OER Programme is funding a UK experimental node⁴⁸. Solutions might be developed that build on these initiatives, specifically to enhance the digital infrastructure for open content in education.

34. Many sites hosting collections of educational materials keep logs of the search terms used by visitors to the site when searching for resources. There might be solutions that could be developed to aid the **understanding of search activity**. For example, a project could deliver a tool that facilitates the analysis of search logs to classify the search terms used with reference to the characteristics of a resource that may be described in the metadata. Such information should assist a collection manager in building their collection (e.g. by showing what resources were in demand) and in describing their resources in such a way that helps users find them. The analysis tool should be shown to work with search logs from a number of and should produce reports in a format that are readily understood, for example a breakdown of how many searches were for “subjects” and which were the most popular subjects searched for. A degree of manual classification will be required, but if the system is capable of learning how to handle certain terms and that this learning would be shared between users: a user should not have to tell the system that “Biology” is a subject once they or any other user has done so. Further information on the sort of data that is available and what it might mean is outlined in CETIS’s blog post on Metadata Requirements from the Analysis of Search Logs⁴⁹. Solutions should be developed as open source software then made free to use or install without restriction, with full documentation. The tool proposed above is one way that we could improve the understanding of search, other suggested solutions are welcome.
35. Effective Search Engine Optimisation is key to open educational resources providing benefits of discoverability, reach reputation and marketing. Guidance on “improving your online presence”⁵⁰ needs applying to the wide range of platforms and content types used for OER, as described in JISC CETIS’ UKOER technical synthesis⁵¹. Projects have explored SEO in several ways, for example, the SCOOTER project has produced guidance on its chosen approach to search engine optimisation⁵² and the MMTV project experimented with Google AdWords to improve SEO⁵³. The variations in format types and platforms mean that it is exposed to web search in a variety of ways. A particular key issue is how “repositories” compare to “web 2.0 services” in terms of search engine optimisation. To answer that, we may need to go beyond theory into running a structured experiment. For example, a technical investigation/tool for the **SEO of commons platforms and formats for OER** would be very useful. This project would be a repeatable approach, using technical tools to run the SEO work and capture and present the findings in a useful way. The outputs of such an investigation would include the methodology, a findings report to JISC,

⁴⁴ <http://code.google.com/p/oer-roadmap/>

⁴⁵ <http://swordapp.org/>

⁴⁶ <http://discovery.ac.uk/>

⁴⁷ <http://www.learningregistry.org/>

⁴⁸ <http://blogs.cetis.ac.uk/lmc/2011/11/07/jisc-learningreg-node/>

⁴⁹ <http://blogs.cetis.ac.uk/philb/2011/02/23/searchlogs/>

⁵⁰ <http://www.netskills.ac.uk/content/projects/2009/sca-seo/index.html>

⁵¹ <http://blogs.cetis.ac.uk/johnr/2011/08/26/ukoer-2-content-management-platforms/>

⁵² <http://www.sicklecellanaemia.org/OER/article.php?id=135>

⁵³ <http://multimedia-oer.blogspot.com/2009/08/7-search-engine-optimisation-ad-words.html>

and an accessible set of outputs aimed at OER projects. Other solutions to improving SEO for open content would also be very welcome.

36. Understanding use has been a major theme of the OER Programme⁵⁴ Phase Two. The Value of Reuse⁵⁵ report and the Literature Review of Learners Use of Open Educational Resources⁵⁶ captured what is known about use of open educational resources. The Learning Registry⁵⁷ is relevant here. The Listening for Impact⁵⁸ study analysed the feedback and usage of some open content collections. Further useful resources are available from the Activity Data Programme⁵⁹. **Analytics** may be an important way to provide evidence of the benefits of open educational resources, so enhancing content and platforms to enable enhanced usage tracking, exploiting APIs of third party systems, exploring ways of capturing and visualising use, and providing dashboards to manage analytics data may be very useful.
37. Online profiles are becoming a part of academic identity and open content provides a significant opportunity for academics to enhance their profile, alongside managing and reflecting on their professional work. To this point many efforts at creating academic profiles building on institutional information and open content have focused exclusively on profiles of publications and the provision of open access to scholarly communications. However, other forms of open content can play a significant role in academic identity and professional development. A key opportunity is therefore **linking a broader range of open content to academic profiles**. This might involve fully/semi-automated integration of publication/release/record of multiple types of open content into academic staff profiles. This is not about creating new platforms but of using feeds and APIs to enhance existing systems that handle continuing professional development / CVs / ePortfolios etc. Examples of this sort of functionality can be found in Humbox's profile on contributing authors⁶⁰ which also allows users to embed that author's content list elsewhere, and Rice Connexions offers author profiles⁶¹. Services such Slideshare and Youtube host user-generated content are well used as platforms for open content. Proposals could demonstrate fully/semi-automated approaches that can flexibly draw on multiple distributed sources of open access articles, OER, blog posts and so on. Proposals to address this opportunity are very welcome.
38. One mechanism that connects people to content⁶² is **social recommendation**. This includes favouriting, liking, bookmarking, reviewing, and social curation tools such as Scoopit⁶³, paper.li⁶⁴, zite⁶⁵, storify⁶⁶, pearltrees⁶⁷ and so on. Often this involves browser-based tools such as bookmarklets⁶⁸ making it very easy for people to capture, share and store useful resources. There are two OER-specific bookmarking

⁵⁴ <http://infteam.jiscinvolve.org/wp/2011/03/13/opencontentstories2/>

⁵⁵ <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer2/oerimpact.aspx>

⁵⁶ <http://www.jisc.ac.uk/whatwedo/programmes/elearning/oer2/LearnerVoice.aspx>

⁵⁷ <http://www.learningregistry.org/>

⁵⁸ <http://blogs.oucs.ox.ac.uk/listeningforimpact/publications/>

⁵⁹ <http://www.activitydata.org/>

⁶⁰ <http://humbox.ac.uk/profile/12>

⁶¹ http://cnx.org/content/expanded_browse_authors?letter=R&author=drocchesso

⁶² <http://infteam.jiscinvolve.org/wp/2011/08/23/connecting-people-content/>

⁶³ <http://www.scoop.it/t/oer-tech/p/711387389/favorites-and-my-challenge>

⁶⁴ <http://paper.li/sheilmcn#!education>

⁶⁵ <http://zite.com/>

⁶⁶ <http://storify.com/ambrouk/webinar-jiscmr-20111012>

⁶⁷ <http://pear>

⁶⁸ <http://www.edtechpost.ca/wordpress/2011/09/09/bookmarklets/>

tools available that handle the licensing characteristics of open content: FavOERites⁶⁹ developed at Newcastle University (as a UKOER funded project) and the OER Commons tool⁷⁰ both of which have APIs and have open sourced their code. The implementation and enhancement of these tools to handle open content may be a useful area for projects to explore. For example, projects might develop solutions for making content “share-friendly” to these tools, how the tools can use automatically generated metadata about licences, the user and their context, and how shared tags and vocabularies might enable more effective sharing for educational purposes.

39. The growth in **e-books and e-readers**, both open and proprietary, is of interest to education. Books are a familiar format to use in teaching, but also digital technologies affording new ways of creating, sharing and using books. For example, the College Open Textbooks initiative⁷¹ states that “We have found that open textbooks should be:

- easy to use, get and pass around
- editable so instructors can customize content
- cross-platform compatible
- printable
- and accessible so they work with adaptive technology”

In the UK, JISC Collections have been running the ebooks observatory⁷² and examining business models for etextbooks⁷³. Developments from the research world are emerging around Enhanced Publications⁷⁴ which combine research text, data and rich media. There is a recently announced pressbooks platform⁷⁵. International initiatives such as the The Saylor Open Textbook Challenge⁷⁶ the WA State open course library etextbook initiative⁷⁷ and have raised the profile of *open* textbooks. JISC CETIS have described the use case for open e-textbooks⁷⁸. There is guidance on ebooks available from JISC digital media⁷⁹, and JISC has funded the #jiscpub⁸⁰ R&D projects. Several campus-based publishing projects have piloted reusable approaches, including Epicure⁸¹, CampusROAR⁸² Larkin Press⁸³ and another useful example to look at is “living books about life”⁸⁴.

40. Phases 1 and 2 of OER programme made use of a wide range of platforms, blogs, wikis, repositories and often made modifications to the software to fully support OER use cases. It is likely to mean improving ingest and expose mechanisms, handling licence information, addressing syndicated feeds, APIs, widgets and apps. An example of platform enhancement would be the work Oxford University and others have done with Wordpress⁸⁵ or the SUNY Academic Commons in a Box⁸⁶ work.

⁶⁹ <http://oerbookmarking.ncl.ac.uk/>

⁷⁰ <https://github.com/ISKME/OER-Commons>

⁷¹ <http://collegeopentextbooks.org/>

⁷² <http://observatory.jiscebooks.org/>

⁷³ <http://etextbook.jiscebooks.org/overview/>

⁷⁴ <http://www.driver-repository.eu/Enhanced-Publications.html>

⁷⁵ <http://pressbooks.com/about/pressbooks-launch>

⁷⁶ <http://www.saylor.org/otc/>

⁷⁷ www.opencourselibrary.org

⁷⁸ <http://blogs.cetis.ac.uk/lmc/2010/11/25/open-e-textbook-use-case/>

⁷⁹ <http://www.jiscdigitalmedia.ac.uk/crossmedia/advice/introduction-to-e-books/>

⁸⁰ <http://jiscpub.blogs.edina.ac.uk/about/>

⁸¹ <http://www.jisc.ac.uk/whatwedo/programmes/inf11/inf11scholcomm/epicure.aspx>

⁸² <http://www.jisc.ac.uk/whatwedo/programmes/inf11/inf11scholcomm/campusroar.aspx>

⁸³ <http://www.jisc.ac.uk/whatwedo/programmes/inf11/inf11scholcomm/larkinpress.aspx>

⁸⁴ <http://livingbooksaboutlife.org/>

⁸⁵ <http://blogs.oucs.ox.ac.uk/openspires/2011/02/18/why-wordpress-for-oer-because-it-has-widgets/>

Proposals are welcome to **enhance platforms for open content**. Bidders may wish to create enhancements to existing release, aggregation and remix platforms to improve the transfer of open content for educational purposes. Projects may wish to combine existing tools to provide enhanced functionality. The outcomes of these projects should be a richer exchange of metadata between publishing platforms, aggregators and other services used in the sharing of openly licensed content.

41. Proposals are invited to develop solutions that meet the objective of enhancing digital infrastructure for open content in education. The opportunities and challenges above are only indicative and not exhaustive. JISC and the Academy are open to proposals addressing these and other areas that can help provide solutions to the sector.

42. It is not the intention of this call to develop long term sustainable technical software and services, although this might be achieved where there is a case within a service environment or in the longer term. This call aims to build capacity to develop meaningful and useful infrastructure and to identify possible solutions that may be learnt from or, where appropriate, built upon to enhance services and applications.

Project Requirements

43. These projects must produce solutions to enhance the digital infrastructure to support open content for education. These are Rapid Innovation projects. The benefits of this approach are described in “Why Rapid Innovation?”⁸⁷ In keeping with the size of the grants and short duration of the projects, the bidding process is lightweight (see the Bidding Form), and the reporting process will be blog-based.

44. Bids must demonstrate how the project will **address the needs of users** by

- Providing the outline of a compelling **Use Case**⁸⁸ that the project is designed to meet. (See examples⁸⁹)
- Naming a specific community being addressed by the project
- Specifying what the requirement is, how the bid will meet this requirement and thus how it will resolve particular “pain points”;
- Indicating plans for user engagement including strategies for involvement in the development process and how users will validate the project deliverables

45. Projects must **deliver solutions**

1. Solutions might be:

- Prototype of a lightweight service or interface;
- Demonstrator prototypes;
- User-ready widgets for common platforms
- APIs, plug-ins or add-ons onto content and infrastructure. These should produce code which should deliver new functionality rather than ‘tweaking’ of existing resources;

⁸⁶ <http://news.common.gc.cuny.edu/2011/11/22/the-cuny-academic-commons-announces-the-commons-in-a-box-project/>

⁸⁷ <http://ie-repository.jisc.ac.uk/451/1/OBC.pdf>

⁸⁸ http://en.wikipedia.org/wiki/Use_case

⁸⁹ <http://obd.jisc.ac.uk/navigate>, <http://sconulerm.jiscinvolve.org/wp/>,
<http://blogs.cetis.ac.uk/lmc/2010/11/25/open-e-textbook-use-case/>

2. All solutions must be open source or reusable with full documentation. Project deliverables can build on proprietary components but wherever possible the final deliverables should be open source. If possible a community based approach to working with open source code should be taken rather than just making the final deliverables available under an open source licence
3. Critique of the technical solutions, standards and protocols used and their fitness for purpose;
4. Commentary/recommendations on how the solutions/applications might be further adopted.

46. Because of the nature of these projects, **the primary reporting mechanism will be blog posts.**

- Project **Outputs** should include:
 - Project blog
 - Minimum blog posts required
 - Project plan
 - Use case documentation
 - Project in a nutshell post: 140char description, paragraph description, image
 - At least 2 interim updates
 - Lessons learnt post
 - List of outputs
 - Descriptive post per output
 - Reflections
 - 2 minute video describing your output
 - The outputs themselves
- All outputs should comply with JISC's IPR policy in terms of open access and open licensing (see terms and conditions below). Bidders should be aware of those requirements before they start.

47. As these projects are small and lightweight, **all staff must be in place at the start of the project**, including interns and/or consultants. Project reporting requirements for these projects will be relatively lightweight. Bidders should therefore focus on areas where they have existing staff, skills and capacity to deliver solutions for the benefit of users.

48. In order to deliver rapid innovation within the timeframe and budget for these projects. JISC requires an **open innovation project management approach**:

- Development should be to a rapid, open or agile methodology that allows for iterative development in consultation or in parallel with the target community. Appropriate bidders are encouraged to liaise with OSS Watch⁹⁰, who can provide advice in this area. Bidders are also encouraged to engage with the DevCSI developers community⁹¹.

49. Projects should work with users, as outlined above

- Participation in community effort to amalgamate the results together. Project outputs should be disseminated through a blog (or wiki) that can be syndicated via the tag, "#ukoer". Common tags should be used so the results can be amalgamated together or aggregated.

⁹⁰ <http://www.oss-watch.ac.uk/>

⁹¹ <http://devcsi.ukoln.ac.uk/blog/2011/04/18/oer-hack-day/>

- Projects will need to acknowledge and report on organisational issues such as how their solution fits with/impacts on workflows, data management, roles and responsibilities;
- Partnership and consortia working will need to be managed according to the scale of work, timescales and resource. Partnership working /subcontracting with existing commercial companies, interns or other third parties is however welcome;
- Project management should be lightweight but effective, using a method such as SCRUM⁹² to ensure the project is responsive to changes over its course;
- A lightweight project plan, which details what is to be done, will be required within two weeks of receipt of the project grant letter;
- Reporting will be via a syndicated project blog (or wiki) with updates expected every month over the duration of the project;
- Projects will be expected to complete a final report, summarising their experiences on a syndicated project blog (or wiki).

50. In order to maximise **access to deliverables**, bidders should adhere to the following criteria:

- Projects must work with services and content that are available and licensed for the purposes required in the project: if licence conditions are not published, this may need checking with service providers prior to submitting the bid;
- Projects should consider the different access restrictions on different data/resources to be used within the project. We expect solutions to be available to users without authentication or payment.
- Without formal service level agreements, dependency on third party systems can limit the shelf life of deliverables. For these types of projects, long term sustainability although always desirable, is not an expected outcome. However making the project deliverables available for at least one year after the end of the project is essential so opportunities are realised and lessons can be learned.

51. Projects should **build on existing work**:

- Funding will not be allocated to allow a simple continuation of an existing project or activity. The end deliverable must address a specific problem that is accepted by the community it is intended for, and produce deliverables within the duration of the project funding;
- There should be no expectation that future funding will be available to these projects. The grants allocated under this call are allocated on a finite basis. Ideally, the end deliverables should be sustainable in their own right as a result of providing a useful solution into a community of practice, although it is recognised that the outcomes of these projects might be lessons learned rather than sustainable deliverables;
- Wherever possible projects should use existing software and tools to meet the project use case(s) and deliver the desired functionality, in order to add value and avoid duplication. Therefore, bidders proposing the development of new software and tools should show evidence of consideration of existing solutions, for example, by listing what services, software and tools have been considered and why they are not sufficient.

52. The **tag** for activity relating to this strand is “ukoer” This tag will be used for the entire lifecycle of the rapid innovation projects. The purpose of the tag is to enable aggregation and analysis of discussion. Please use this tag when discussing the call

⁹² [http://en.wikipedia.org/wiki/Scrum_\(development\)](http://en.wikipedia.org/wiki/Scrum_(development))

or rapid innovation projects using any site that supports tagging (e.g. Twitter, delicious, Flickr, blogs etc). We also encourage the creation and use of tags for individual rapid innovation projects, these can be created during proposal writing if this would be useful

53. The **public mailing list** for activity relating to this strand is oer-discuss⁹³. Bidders are encouraged to join.

Evaluation Criteria

54. Proposals will be evaluated according to criteria below:

EVALUATION CRITERIA (and weighting):
Extent to which bid meets the scope of the Call (Strong / Weak / Out of Scope)
Value for money (10%)
Robust project plan (30%)
Clear and compelling use case (20%)
Potential benefits/impact (20%)
Engagement with users and stakeholders (10%)
Risk assessment (10%)

General Expectations

55. Projects are expected to allocate at least 3 person-days and related expenses to engage in programme-level activities. In particular, all projects are expected to attend programme meetings and relevant special interest groups. Any further expectations will be outlined in the relevant call.

JISC Services

56. Bidders should be aware of the range of JISC services that may be relevant to provide advice, guidance or support dependent upon the proposal being submitted. Further information on JISC's advisory services (JISC Advance), including the Regional Support Centres, can be found at:

<http://www.jisc.ac.uk/whatwedo/services/jiscadvance.aspx>

Technological Approaches to be Employed

Open Standards

57. Open standards should be used wherever possible, and any deviation from these should be justified in the proposal and any alternative interface specifications should be designed with re-use by others in mind. The JISC recognises that emergent technologies lack the maturity of standards of some existing technologies. Interoperability and data transfer are key to the provision of next generation

⁹³ www.jiscmail.ac.uk/oer-discuss

technologies for education and research, and projects are expected to work with JISC to address these issues.

58. Relevant standards can be found in the JISC Standards Catalogue⁹⁴. Those bidding for projects related to the Information Environment should also refer to the Information Environments standards⁹⁵.

59. Bidders must also ensure that they request adequate funding for any additional costs that may be incurred by adopting a standards-based approach. Projects should demonstrate sound risk management with regard to the adoption of standards for immature emergent technologies and refer to appropriate sources of expertise.

60. Further guidance on standards and their stipulation can be found in the relevant calls.

Software Outputs

61. It is expected that software outputs will normally be licensed as open-source unless a case is made to the contrary and accepted by the evaluation panel. Applicants should make clear the licence under which software outputs will be released, mechanisms that will be put in place for community contribution (users and developers) throughout the project, and the sustainability plan for the software beyond the period of project funding. Applicants should consult with JISC's open source software advisory service OSS Watch⁹⁶ and the Open Middleware Infrastructure Institute UK⁹⁷ on matters relating to open source software development. Applicants should refer to JISC's Policy on Open Source Software for JISC Projects and Services⁹⁸.

62. To be able to re-use the software it must be of a certain quality and maturity. For example, it must have supporting information, FAQ, installation guides, test data etc. to help others use it. In addition to the advice from the OSS Watch and OMII-UK, elements that contribute to software quality and project maturity are outlined in the Software Quality Assurance (QA) and Open Source Maturity Model (OSMM) Development guidelines.⁹⁹ Projects will be expected to follow the recommendations from these sources of guidance.

Risk Assessment

63. All projects have an element of risk. Even in the best-planned projects there are uncertainties, and unexpected events can occur. A risk can be defined as:

“The threat or possibility that an action or event will adversely or beneficially affect the ability to achieve objectives.”

64. A risk analysis when putting together a bid will help you predict the risks that could prevent a project from delivering on time or even failing. It will also help you to manage the risks should they occur. Consideration should be given not only to threats that could lead to failure to deliver objectives (as has already happened) but

⁹⁴ JISC Standards Catalogue : <http://standards.jisc.ac.uk>

⁹⁵ JISC Information Environment technical standards <http://www.ukoln.ac.uk/distributed-systems/jisc-je/arch/standards/>

⁹⁶ OSS Watch <http://www.oss-watch.ac.uk/resources/bidsupport.xml> and <http://www.oss-watch.ac.uk/resources/adviceforprojectbids.xml>

⁹⁷ OMII-UK <http://www.omii.ac.uk/>

⁹⁸ Open Source Policy <http://www.jisc.ac.uk/fundingopportunities/opensourcepolicy.aspx>

⁹⁹ Software Quality Assurance (QA) and Open Source Maturity Model (OSMM) Development guidelines: http://www.jisc.ac.uk/uploaded_documents/SQA_OSMM_09.06.doc

also to consider opportunities (constructive events) which if exploited could improve the way of achieving objectives.

65.A risk analysis addresses the following questions:

- What could possibly happen?
- What is the likelihood of it happening?
- How will it affect the project?
- What can be done about it?

66.Further guidance on Risk Assessments can be found in Section III, paragraph 7 of the Project Management Guidelines. JISC InfoNet also hosts an InfoKit on Risk Management¹⁰⁰. It explains what risks are, how to do a risk analysis, and how to manage risks during a project.

Costing and Pricing a Bid

67.JISC innovation projects are funded in UK higher education institutions on the basis of full economic costs. Bids from these institutions should therefore be constructed on a full economic cost (fEC) basis using the TRAC methodology. An example budget for bidders to use can be found in Appendix C.

68.Other institutions submitting bids should use their usual costing and pricing practices but all costs should be clear and transparent, clarifying the number of days each individual working on the activity will provide, in order to assist the evaluators in determining the value for money of the proposal.

69.The bid should indicate the contribution to the project being sought from JISC and the intended contribution from the lead institution and any project partners. 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. Where a bid involves partners from outside UK HE, such as English FE or a commercial company, the partners should cost their activities using current costing practice in their college or organisation and clearly identify partner contributions.

70.When assessing proposals, JISC will take into consideration the reasonableness of the total cost of the project and the institutional contributions. It is important to JISC that HE institutions are costing proposals accurately and seeking the appropriate level of support from us, so that they are not over-committed, and hence are ensuring the long-term availability of their activities. However, JISC also needs to ensure consistency of treatment, and that it is using its funding effectively across all proposals.

71.Through the funding provided to projects 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, and financial benefits) in 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 from JISC. JISC reserves the right to ask additional questions about the budget prior to agreeing any funding for a project.

¹⁰⁰ JISC InfoKit on Risk Management <http://www.jiscinfonet.ac.uk/InfoKits/risk-management>

72. Further guidance on fEC for JISC-funded research and development projects can be found at:
<http://www.jisc.ac.uk/fundingopportunities/bidguide/fulleconomiccosting.aspx>
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.jcpsq.ac.uk/guidance/about.htm>.

Freedom of Information

73. 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.
74. JISC will not disclose any information received during this bidding 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.
75. It is JISC policy to make the content of any bid funded by JISC through this call 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 taking place.

Terms and Conditions of Grant

76. JISC will oversee and monitor the progress of projects. All projects will be expected to follow JISC's Generic Terms and Conditions of Grant. A copy of this is attached at Appendix B to this document. It is the bidders' responsibility to read this.
77. All projects will be managed following JISC project management guidance, which can be found at http://www.jisc.ac.uk/proj_manguide. These guidelines may also be of use to bidders when putting together a project proposal.
78. It is intended that the deliverables created as part of this programme will, as appropriate, be deployed by 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 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 any opportunities for continuation funding and embedding within institutions.

Intellectual Property Rights

79. As a general rule, JISC does not seek to retain IPR in the project and/or service outputs 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 (or 'at cost' where appropriate), to the UK HE, FE and Research community in perpetuity and in accordance with JISC's Open Access and/or JISC's Open Source Software Policy wherever possible, and that these outputs may be disseminated widely in partnership with JISC. Further information is available in Appendix B.

80. JISC, however, reserves the right to acquire all Intellectual Property Rights, including, without limitation, copyright, database right, performers rights, patents and trade marks, whether registered or unregistered, in any works created as a result of the funding either indefinitely or for a certain fixed period of time on behalf of HEFCE. JISC also reserves the right to request that all Moral Rights are waived. This ability to acquire the Intellectual Property Rights will only be used under exceptional circumstances and in any such case where JISC considers this necessary, the JISC will explain in writing to you the reasons for the transfer. This includes the situation where JISC is funding the creation of a national service for the community and 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.
81. For all project and/or service outputs, acceptance of the terms and conditions of the grant will provide JISC or its representatives with an irrevocable, non-exclusive royalty-free licence in perpetuity to exploit the outputs in any way it sees fit, including enabling the JISC to use, archive, preserve and disseminate the outputs.

Open Access

82. JISC supports unrestricted access to the published output of publicly-funded research and wishes to encourage open access to research outputs to ensure that the fruits of UK research are made more widely available. JISC firmly believes in the value of repositories as a means of improving access to the results of publicly-funded research and is investing significantly in this area. JISC expects that the full text of all published research papers and conference proceedings arising from JISC-funded work should be deposited in an open access institutional repository, or if that isn't available, a subject repository. Deposit should include bibliographical metadata relating to such articles, and should be completed within six months of the publication date of the paper. Further details are provided in JISC's Terms of Conditions of Grant (see Appendix B).

Submitting a Bid

83. A guide to bidding for JISC projects can be found at: <http://www.jisc.ac.uk/bidguide>
84. The deadline for receipt of submissions is **12:00 noon UK time on Friday 27th January 2012**. Late proposals will **NOT** be accepted. It is the responsibility of the bidder to ensure that the proposal has arrived by the deadline stated. The JISC Executive will strictly adhere to this policy. **There will be no appeals process for late bids**. In light of this, it is recommended that bidders plan to submit proposals several days before the deadline in case of any technical difficulties or other extenuating circumstances.
85. Proposals should **NOT** exceed six single-sides of A4 pages and should be typeset in Arial or a similar font at 11-point size. All key information as outlined in the guidance on structure of proposals **MUST** be included within the six-page limit unless otherwise

indicated. **Any bids exceeding the six-page limit will be rejected by the Executive prior to the evaluation stage.**

86. Proposals **MUST:**

- Include a completed bid cover sheet (the template at Appendix D must be used) **which is included in the page limit for the proposal;**
- Include a completed FOI Withheld Information Form (see Appendix A) in a separate pdf file which also includes the letters of support;
- Be accompanied by a letter(s) of support from an authorised senior manager at the lead institution and from any partner institutions (only one letter per institution) in a separate pdf file which also includes the completed FOI Withheld Information Form.

87. This is an electronic-only submission process, therefore all documentation must be submitted in PDF format. **Two PDFs are required as part of the submission: one to include the main proposal (including bid cover sheet); and one to include the FOI Withheld Information Form and letter(s) of support.** The size of the overall submission should not exceed 10Mb; a zipped folder should be used if the size of the files exceeds 10Mb (note: any files exceeding 10Mb are likely to be returned by the mail server).

88. Bidders must ensure their proposals have paragraph and section numbers in case of any queries or FOI requests. No additional security settings should be activated for PDFs to allow JISC to redact information if necessary prior to any release under FOI.

89. All proposals must complete the *FOI Withheld Information Form* (see Appendix A) 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 JISC may not be able to uphold such decisions in all cases. JISC will consult with the lead institution prior to the release of any information listed in the *FOI Withheld Information Form*.

90. 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 interests of the institution or its partners;
- Information, which if disclosed, would break the principles of the Data Protection Act 1998.

91. 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 and/or publication on JISC's website should your proposal be successful.

92. The bid submission email address is outlined below.

Programme/Initiative	Bid Submission email Address
OER Programme: Rapid Innovation and Investigation Strand	oer@jisc.ac.uk

93. All bids should include the name of the lead institution in the subject line of the email. It is the responsibility of the bidder to ensure that the bid is sent to the correct email address. Bidders will receive an automatic confirmation of receipt of any proposal

sent to the relevant email address. The email address should not be used for general enquiries. Separate contact details for enquiries are provided below. Bidders submitting more than one bid in response to this call must submit these in separate messages to the relevant email address(es).

- 94.If no automatic confirmation is received, it is the responsibility of the bidder to contact JISC within one day of submitting the bid to confirm whether the proposal has been received. In 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 correct address prior to the deadline.

Evaluation Process

- 95.A selection panel will be established to review the bids received. A standard marksheet and guidance for markers is prepared for each evaluation process. This is to help to ensure a common approach from evaluators and to clarify the evaluation criteria, and definitions for the different marks it is possible to award. There are a number of sections which the evaluator is required to complete to inform decisions: a score for each evaluation criteria; detailed comments to clarify the mark awarded for each criteria; a section to describe overall impressions of the bid; and a recommendation. Further information about JISC's procedure for evaluating bids can be found at: <http://www.jisc.ac.uk/bideval>.
- 96.JISC will endeavour to notify successful bidders by 9th March 2012. Projects should commence from 19th March 2012. All projects must be complete by 19th October 2012.
- 97.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.
- 98.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, 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.
- 99.JISC reserves the right not to commission the full amount of funding outlined in this call, and to issue a subsequent call to address any remaining work.

Checklist for Bid Submission

- 100.When submitting your bid, we recommend you check the following points:
- i. Have you completed the bid cover sheet (see relevant appendix for the template which must be used)?
 - ii. Have you followed the bid format outlined?
 - iii. Have you paragraph- and section-numbered your proposal?
 - iv. Have you read JISC's Generic Terms and Conditions of Grant (see relevant appendix)?

- v. Are you clear about the evaluation criteria on which your bid will be judged?
- vi. Have you looked at the Example Budget and guidance (see relevant appendix) to help you present your costings?
- vii. Have you provided a summary of the qualitative and quantitative benefits the lead institution and any project partners as a whole expect to receive from the project and clarified the nature of the institutional contributions?
- viii. Have you kept within the page limit for the main body of the proposal (do NOT include any appendices to your bid unless specifically requested in the call)? The page limit for this call is 6 pages.
- ix. Is your bid in a PDF format with no additional security settings switched on?
- x. Have you completed the FOI Withheld Information Form (see relevant appendix) as part of a separate PDF file with the letter(s) of support?
- xi. Have you included a letter(s) of support from the lead site and each project partner and included these in a separate PDF with the FOI Withheld Information Form?
- xii. Is your bid in a zipped folder if the size of the files exceed 10Mb?
- xiii. Are you aware of the email address to which you need to submit your bid and the need to include the name of the lead institution in the subject line of the email?
- xiv. Are you aware of the deadline for submitting bids? (12:00 noon UK time, Friday 27th January 2012).

101.To summarise, a bid will be automatically rejected if:

- i. It is received after the stated deadline;
- ii. A bid cover sheet (completed according to the template attached) is not included;
- iii. The bid exceeds the page limit outlined in the call (in this case: 6);
- iv. An additional appendix/appendices is/are provided that are not requested in the call (as these will be considered to count towards the page limit outlined in the call).

Further Information

102.Enquiries about this Call should be sent to Emma Charlick, JISC Support Officer,
e.charlick@jisc.ac.uk <http://www.jisc.ac.uk/contactus/staff/emmacharlick.aspx>

103.General enquiries about the bid submission process should be sent to: Laura Holloway (email & phone details)

Appendices

- Appendix A: FOI Withheld Information Form**
- Appendix B: JISC's Generic Terms and Conditions of Grant**
- Appendix C: Budget Guidance**
- Appendix D: Bid Form**

NB: All appendices should be read in conjunction with the main body of JISC Grant Funding 18/11

All appendices and the main body of JISC Grant Funding 18/11 can be found at:

<http://www.jisc.ac.uk/fundingopportunities.aspx>

Appendix A

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, or if we are successful in our bid for funding and our project proposal is made available on JISC's website.

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

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.

Appendix B

Annex to JISC Grant and Contract Letters for Projects

Generic Terms and Conditions of Funding

Preamble

1. JISC funds a wide variety of projects on behalf of its funding bodies. These projects include supporting studies where the main deliverable is a report, and projects where the deliverables include products or services as well as reports. These generic terms and conditions apply to all projects and define the responsibilities of the lead institution and its project partners.

Adherence to Project Management Guidelines

2. The institution and its partners must adhere to the Project Management Guidelines available electronically at http://www.jisc.ac.uk/fundingopportunities/proj_manguide.aspx. The Guidelines provide initial advice on project planning, project management, the relationships between JISC programmes and projects, evaluation, and dissemination. However, the institution and its partners should refer to the designated JISC programme manager for details of how these guidelines are to be interpreted. The Guidelines will be updated from time to time, and the lead institution will be notified of any major changes. It is the responsibility of the lead institution to inform its project partners accordingly.

Submission of Agreed Deliverables

3. The institution and its partners must supply all deliverables specified in the agreed project proposal. The schedule for submitting deliverables must be included in the Project Plan and agreed with the JISC Executive. Any changes to this schedule must be agreed in writing with the JISC Executive.

4. Project deliverables are subject to approval by the JISC Executive, and the framework for approval is outlined in the Project Management Guidelines.

5. Project deliverables will be deposited in the appropriate JISC data centre or managed repository, where appropriate.

Core Project Document Set

PLEASE NOTE THAT REPORTING FOR THIS STRAND WILL BE VIA BLOG POSTS

6. The lead institution must also supply a core set of documents to indicate how the project work will be planned and implemented, to report on progress, and to inform future auditing and evaluation. It is the responsibility of the lead institution to agree these documents with its project partners prior to submission.

7. The core project documents are listed below and further information about each document is provided in the Project Management Guidelines and by reference to the designated JISC programme manager.

8. Core project documents are subject to approval by the JISC Executive, and the framework for approval is outlined in the Project Management Guidelines.

9. Core project documents will be deposited in the JISC records management system and/or project information management system so they are accessible to the JISC Executive.

Core Project Document	Timing
Project Plan (including an Evaluation Plan, QA Plan, Dissemination Plan, and Exit/Sustainability Plan)	Within 1 month of start date
Project Web Page on JISC Web Site (including copy of accepted Project Plan)	Within 1 month of start date
Project Web Site at Lead Institution	Within 3 months of start date
Consortium Agreement (for projects involving more than one institution)	Within 3 months of start date
Progress Reports (including financial statement)	Default 2 per year; schedule to be agreed with Programme Manager for projects of less than 12 months
Technical and Supporting Documentation (for projects creating technical deliverables)	Timing to be agreed with Programme Manager
Final Report	Draft version 1 month before project end date; final version at project end date
Completion Report (including financial statement)	Project end date

Intellectual Property Rights

10. As a general rule, JISC does not seek to acquire or retain IPR in any outputs created as part of the project and/or service. IPR ownership shall therefore vest with you [and your partners, as laid out in your Consortium Agreement]. However, if this is not the case for the particular piece of work you are undertaking, the correct IPR position will be documented in the grant/contract letter.

11. The funding is made available on condition that outputs from the project are made available, free at the point of use (or 'at cost' where appropriate) and under Open Access or Open Source principles where possible, to the UK HE, FE and Research communities in perpetuity in accordance with JISC's Open Access Policy and/or JISC's Open Source Software Policy wherever possible.

12. A condition of funding is that you grant JISC, on behalf of HEFCE, an irrevocable, non-exclusive royalty-free licence in perpetuity to exploit the outputs in any way it sees fit, including enabling the JISC to use, archive, preserve and disseminate the outputs. This may include, where appropriate, the delivery of project outputs to the community under a suitable open access and/or Open Source licence. In all cases, JISC will also retain the right to modify or adapt the project outputs. The purpose of this is to give JISC the ability to ensure outputs are available to the UK education and research community for non-commercial use should you fail to fulfil this condition of funding. You further agree to ensure that any licence you enter into in order to acquire third party materials for the purposes of this project may legally be transferred to a third party, nominated by HEFCE, to enable such continued availability of outputs to the UK education and research community.

13. JISC may terminate this Agreement immediately without further obligation in the event of:

- (i) any breach of this Agreement which cannot be remedied or is not remedied within thirty (30) calendar days of you being requested to do so; or

- (ii) any resolution being passed or petition being presented to wind up your business (otherwise than for reconstruction or amalgamation) or a receiver being appointed of the whole or part of your assets; or a failure to complete a satisfactory Consortium Agreement, where required, in the time required by your JISC project manager; or where, in the reasonable opinion of the JISC, any of the terms or conditions of funding have not been fulfilled.

If termination occurs under any of these circumstances, all rights in any works created by you as a result of the funding shall revert to the JISC on behalf of HEFCE.

14. You [and your partners] must ensure that outputs do not infringe the copyright or any other Intellectual Property Right existing at the time the project is completed (including, but not limited to, database rights, moral rights, performers rights, unregistered or registered trade marks, patents, or registered designs) of any third party. Where necessary, copyright and other Intellectual Property Rights should be cleared before digitisation or incorporation into outputs begins. You must obtain written permission for any third party rights that you incorporate, using a standard clearance letter whose wording has been agreed with your JISC Programme Manager. You must also document all attempts to identify the owner of works where the rightsholders cannot be located (so-called "orphan works".) It is a condition of funding that you must discuss any orphan works you encounter with your JISC Programme Manager and must follow your programme manager's advice regarding how to deal with such orphan works.

15. It is a further condition of grant that you respect the Moral Rights of those individuals who contribute to the project outputs and in particular requires that you (1) acknowledge them by listing the names of those individuals who made a significant contribution to the project outputs in such project outputs, (2) that the text or content of any outputs should be checked by those individuals before release.

16. JISC, however, reserves the right to acquire all Intellectual Property Rights, including, without limitation, copyright, database right, performers rights, patents and trade marks, whether registered or unregistered, in any works created by you as a result of the funding, as appropriate, either indefinitely or for a certain fixed period of time on behalf of HEFCE. JISC also reserves the right to request that all Moral Rights are waived. This ability to acquire the Intellectual Property Rights will only be used under exceptional circumstances and in any such case, the JISC will explain in writing to you the reasons for the transfer.

Open Access

17. JISC supports unrestricted access to the published output of publicly-funded research and wishes to encourage open access to research outputs to ensure that the fruits of UK research are made more widely available. JISC firmly believes in the value of repositories as a means of improving access to the results of publicly-funded research and is investing significantly in this area. A national support project is available to help institutions develop repositories and share practice (http://www.jisc.ac.uk/whatwedo/programmes/programme_rep_pres/rep_support.aspx).

18. JISC requires that all project or service outputs and the full text of all published research papers and conference proceedings arising from the funded work to be deposited into an institutional or subject open access repository. Deposit should include appropriate bibliographical metadata relating to said articles, and the deposit should be completed within six months of the first publication date of the paper. JISC mandates the deposit of the native version (Word, PPT, etc.), with PDF as well if wanted, but certainly with a format from which usable xml can in principle be derived (not PDF).

19. Which version of the article should be deposited depends upon publishers' agreements with their authors but JISC mandates that articles should be made available through publishers that adopt the RoMEO "green" approach as a minimum (for further information see <http://www.sherpa.ac.uk/romeoinfo.html#colours>). Authors should go to another journal if the journal chosen does not adopt the RoMEO "green" conditions.

20. Jorum [<http://www.jisc.ac.uk/whatwedo/services/jorum.aspx>] is a free national repository that provides a long-term solution for hosting and registering the availability of learning and teaching materials. It contains two collections each supporting a different type of licence for use. JorumOpen provides access to resources licensed under Creative Commons that are free to anyone worldwide to use; JorumUK provides access to resources from those who prefer to share their work only within UK Further and Higher Education institutions. Deposit into both collections is, initially, by staff only in UK Further and Higher Education. Information about each collection and how to deposit can be found on the Jorum website. It is mandatory that all learning and teaching materials produced by JISC projects and services should be represented (deposited or linked to) in JorumOpen together with the appropriate metadata. JISC strongly encourages use of Jorum by all JISC-funded projects.

Open Source

21. It is highly desirable that any software components of the outputs 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, see JISC's Open Source Software Policy

(<http://www.jisc.ac.uk/fundingopportunities/opensourcepolicy.aspx>)

and advice from JISC's Open Source Software (OSS) Watch
(<http://www.oss-watch.ac.uk/resources/adviceforprojectbids.xml>)

Adherence to Standards

22. The institution and its partners must use the technical standards stipulated by JISC and where unstipulated open standards wherever possible. Any deviation should be justified in the proposal and any alternative be designed with re-use by others in mind. Ease of interoperability between systems is key to the provision of next generation technologies for education and research, and projects are expected to work with JISC to address this issue. It is the responsibility of the lead institution to inform its project partners accordingly. Relevant standards can be found in the JISC Standards Catalogue <http://standards.jisc.ac.uk/>.

Charging

23. Funding is made available on the condition that the institution and its partners shall make available deliverables developed by the project free of charge to the teaching, learning, and research communities during the period of funding, except for a handling and/or usage charge which must be agreed in writing with the JISC Executive.

Programme Meetings and Events

24. Programme meetings and other events are organised by JISC to brief project staff and share knowledge. Two major programme meetings are held per year, and attendance at programme meetings is mandatory. Projects should allocate staff time to participate in programme activities, and the Project Management Guidelines provide guidance on days per year to allow. The project will be provided with a schedule of meeting dates.

25. Projects should also allocate time to liaise with the Programme Manager on a regular basis, and institutions should provide access to the Programme Manager at any reasonable time.

Dissemination

26. The institution and its partners must commit to disseminating and sharing learning from the project throughout the community. The institution and its partners must develop a Dissemination Plan as part of the overall Project Plan and report on dissemination activities in Progress Reports and the Completion Report. Further information about dissemination is available in the Project Management Guidelines.

Project Web Site

27. The institution and its partners must create a web page and web site to explain the project aims and objectives and to disseminate information about project activities and results. The Project Management Guidelines give guidance on the scope, content, and design of web sites.

28. Where appropriate, project deliverables and core project documents may be posted on the project web site. As the project web site is primarily a dissemination vehicle, deliverables and documents posted are considered to be copies, and the masters will be deposited in the appropriate repository (see paragraph 18 above).

29. The lead institution or one of its partners must agree to host the web site on their server for a minimum of 3 years after the end of the project and to assist JISC in archiving it subsequently.

Publicity

30. In any publicity material, online presence (including project web sites), or presentation (face to face or online) about the project, it is essential to include an indication that the project was made possible by funding from JISC. Projects and services must adhere to JISC Brand and PR Guidelines and to any additional advice established by the JISC Communications and Marketing team in due course.

Evaluation

31. JISC undertakes evaluation of its development projects and programmes to ensure that knowledge and results are shared with the wider community and to improve the development programme itself. Projects are required to participate in programme evaluation activities organised by JISC.

32. The institution and its partners are also required to undertake evaluation of their work. The institution and its partners must develop an Evaluation Plan as part of the overall Project Plan and report on evaluation results in Progress Reports and the Final Report. Further information about evaluation is available in the Project Management Guidelines.

Exit/Sustainability Plan

33. Funding is for a limited term as set out in the letter of grant. The institution and its partners must develop an Exit/Sustainability Plan as part of the overall Project Plan to document the planning needed to get the best value from the work that has been funded. This will include an assessment of what should happen to deliverables and options for sustainability after funding ceases. Where the institution and its partners wish to exploit deliverables on a commercial basis after funding ceases, they should submit a business plan with economic models that demonstrate how the product or service will be self-sustaining. Further information about exit/sustainability is available in the Project Management Guidelines.

Quality Assurance

34. The institution and its partners must put in place appropriate formal quality assurance procedures to ensure that deliverables are fit for purpose and comply with specifications,

JISC guidelines on standards and best practice, and accessibility legislation. Projects must develop a QA Plan as part of the overall Project Plan describing the QA procedures they will put in place and supply evidence of compliance when deliverables are submitted. Further information about QA is available in the Project Management Guidelines.

Payment Schedule

35. The schedule of payments will be indicated in the letter of grant. If more than one institution is involved in a project or service, payments will be made to the lead institution. It is the responsibility of the lead institution to disburse the funds to its project partners.

36. Payment is conditional upon satisfactory progress with milestones and deliverables. The institution and its partners must supply deliverables and core project documents on schedule or subsequent payments may be withheld.

37. At the end of the project, any unspent funds should be returned to JISC unless a formal agreement is reached with the JISC Executive about how these funds may be spent to further support the work of the project.

38. For financial audit, the procedures of the lead or fund-holding institution will apply. In general, JISC does not intend to send financial auditors to projects. However, there remains the possibility that JISC's auditors may wish to audit projects. Project fund holders are required to make themselves available for a visit by members of the JISC Executive or nominees on reasonable notice.

Staff Development

39. Funding is for a limited term as set out in the letter of grant. Near the end of the project funding, institutions should inform project staff about career development opportunities. These might include information about job vacancies within the institution or opportunities for training and career guidance.

Compliance with UK and EU Legislation

40. The institution and its partners must comply with any UK or EU legislation or any international Treaty obligations currently in force or introduced during the timescale of the project that has implications for the conduct of projects or the deliverables/documents they supply. JISC will endeavour to inform the lead institution of relevant legislation and supply guidance for compliance. It is the responsibility of the lead institution to inform its project partners accordingly. Further advice and guidance is available from the JISC Legal Information Service (<http://www.jisclegal.ac.uk/>), email: info@jisclegal.ac.uk, tel: 0141 548 4939.

Accessibility

41. In line with Government legislation and social inclusion initiatives, JISC is committed to providing resources that are accessible to a diverse range of users. In order to achieve this, JISC advise that all resources including the project web site meet good practice standards and guidelines pertaining to the media in which they are produced, for example HTML resources should be produced to W3C html 4.01 strict (<http://www.w3.org/TR/1999/REC-html401-19991224/>) and use W3C WAI guidelines to double A conformance (<http://www.w3.org/WAI/WCAG20/quickref/>). Further advice and guidance is available from the JISC TechDis Service (<http://www.techdis.ac.uk/>), e-mail: helpdesk@techdis.ac.uk, Tel: 01904 754 530.

Data Protection

42. The institution and its partners must accept responsibility as the data controller or Joint Data Controllers as defined by the Data Protection Act 1998 ('the Act') for the personal data

collected and processed as a result of this project. Neither HEFCE nor the funding bodies accept responsibility for any breaches of the Act which occur due to the actions of project staff or agents directed by them.

43. HEFCE is the recognised data controller for JISC. In line with the requirements of the Data Protection Act 1998, the institution and its partners hereby grant HEFCE permission to hold the names, job titles, and work contact details of project staff to enable administration of the programme that the project is part of and to keep project staff up to date with information pertinent to it.

44. The institution and its partners also grant HEFCE permission to hold these contact details as part of the main JISC Contacts Database and Project Information Management System. They will be used to contact staff or send them information from other JISC sources relating to forthcoming events or initiatives which may be of interest.

45. This information is made available to the JISC Executive, staff within the Regional Support Centres and staff within other JISC-funded services and initiatives only for the purposes described above. Contact details held within the Project Information Management System are also published on the project pages on the JISC web site (<http://www.jisc.ac.uk/projects>). This data will be held until such time as the institution instructs HEFCE otherwise or for the lifetime of HEFCE.

46. Any institution which prefers that project details were not held as part of the JISC Project Information Management System or Contacts Database, or would like any further information about how this data will be processed, should contact the JISC Executive.

Freedom of Information

47. The institution and its partners should be aware that educational institutions are listed as public authorities under Schedule 1 of the Freedom of Information Act 2000 ('the Act'). The information created by project staff during the course of the project and as described in their original bid is therefore covered by the provisions of the Act.

48. Neither HEFCE nor the funding bodies accept any responsibility for the project's compliance with the Act for information held by the project staff. This is deemed to be the responsibility of their host institution(s).

49. HEFCE will comply with the terms of the Act for information relating to the project or programme of which it is part that is held by the JISC Executive. Project staff should therefore be aware that any contracts, information or communications in written form (including email) which are sent to the JISC Executive (including the Programme Manager) may be made available to the public on receipt of a valid request and unless covered by one of the classes of exempt information listed in Part 2 of the Act.

JISC Executive
September 2010

Appendix C: Budget Guidance

PLEASE NOTE THAT A BUDGET OUTLINE IS NOT REQUIRED FOR THIS CALL, BUT THE GUIDANCE SHOULD BE FOLLOWED ON APPROPRIATE ACTIVITY COSTING.

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.

Projects should be costed using the TRAC Research indirect and estates charge-out rates, and TRAC fEC methods for Research. However, this does not affect their classification as Research or Other/Other Services Tendered for reporting in annual TRAC, HESA, the financial statements or with regard to Customs and Excise (VAT) treatment.

If a project is not classified as Research under annual TRAC the Research charge-out rates should still be used. However, there is no need to amend the denominator or the numerator of the charge-out rate calculations to try to incorporate these projects.

Academic-related staff who lead or work directly on a project should be classified as 'researchers' when costing the project and should be allocated indirect/estates costs. They should be included in the annual TRAC time allocation collection exercises when those are carried out, and their time on projects should be included in the denominator of the indirect and estates charge-out rate calculations when they are next calculated.

Further guidance on fEC for JISC-funded research and development projects can be found at: <http://www.jisc.ac.uk/fundingopportunities/bidguide/fulleconomiccosting.aspx>.

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. Directly incurred staff should be completing timesheets if they are not 100% chargeable to the project.

Unless a member of staff will be spending 100% of their time on a project, all estimates of time on a project should be made in numbers of hours or days, for each year of the project. This should then be converted to a FTE for use in calculating the indirect and estate costs charges.

Where a post graduate research (PGR) student is carrying out some of the work on a project, the fEC associated with that student should be included on the project application.

This will include:

- Stipends/maintenance costs
- The principal investigator's (PI) supervision/training time
- Indirect and estates costs on the PI time

- Indirect and estates cost on the PGR FTE (weighted by 0.2 for indirect costs, and 0.5 or 0.8 for estates).

Tuition fees should not be included in the fEC.

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. Institutions should use the non-laboratory estates rate if desk-based work (not requiring specialist computing facilities) is done by staff in laboratory departments. Work carried out by academic-related staff such as librarians or IT managers would normally be categorised as non-laboratory but this would depend on the type of project.

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.

NB: The budget section of the proposal should clarify the FTEs used to calculate the indirect and estates charges, and indicate which staff have been included.

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.

Virement

Directly Incurred Costs can be vired within the overall Directly Incurred budget heading, however, Directly Allocated and Indirect Costs cannot (they do not vary from the estimates made on project application).

Appendix D - Bid Form

JISC Grant Funding **xx/xx**

Cover Sheet for Bids <i>(All sections must be completed)</i>		
Name of JISC Initiative: HEA/JISC OER Programme: Rapid Innovation		
SECTION ONE		
Name of Lead Institution:		
Name of Proposed Project:		
Name(s) of Project Partners(s)		
Full Contact Details for Primary Contact: Name: Position: Email: Tel: Address:		
Length of Project: (no longer than 6 months)		
Project Start Date: (no earlier than Monday 19th March)	Project End Date: (no later than Friday 19th October)	
SECTION TWO		
Total Funding Requested from JISC:		
Total Institutional Contributions:		
Funding for project partners:		
SECTION THREE		
Outline Project Description (Max 500 words)		
Use Case		

Max 1 page / 500 words, diagrams welcome.
Please include Use Case within proposal, as a separate attachment or provide a link

Bidders retain copyright of their use case and should clearly indicate ownership, but licence the use case as CC BY SA. Bidders are encouraged to make their use cases public, and JISC reserves the right to publish submitted use cases.

Proposal

Max 6 pages / 3,000 words including diagrams/charts
Please attach Proposal

This should include intended benefits/impact of the work, a schedule and structure for the work, risk assessment and a commitment to engaging with users and stakeholders

REMINDER OF EVALUATION CRITERIA (and weighting):
Extent to which bid meets the scope of the Call (Strong / Weak / Out of Scope)
Value for money (10%)
Robust project plan (30%)
Clear and compelling use case (20%)
Potential benefits/impact (20%)
Engagement with users and stakeholders (10%)
Risk assessment (10%)

SECTION FOUR

I have looked at the example FOI form at Appendix A and included an FOI form in this bid YES / NO (delete as appropriate)

I have read the Funding Call and associated Terms and Conditions of Grant at Appendix B YES / NO (delete as appropriate)

For FE institutions only: Please tick this box if you are an FE institution in England, please tick this box to confirm that you meet the eligibility requirement of teaching HE to more than 400 FTE