

## Users and Innovation Cover Sheet

<b>Cover Sheet for Proposals/Expressions of Interest</b> All <b>appropriate</b> sections must be completed.	<b>JISC Capital Programme</b>
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<b>Name of Capital Programme:</b> Users and Innovation: Personalising Technologies	
<b>Name of Area Bidding/Submitting Interest For (tick one):</b>	
<b>Call I a)</b> : Users and Innovation Support Project(s) Project 1 : Support for community of practice and online activities	<input type="checkbox"/>
<b>Call I b):</b> Users and Innovation Support Project(s) Project 2 : Support for Users and Innovation development model	<input type="checkbox"/>
<b>Call II:</b> Next Generation Technologies and Practice Phase 1 Expression of Interest	<input type="checkbox"/>
<b>Call III:</b> Implementations of Personal e-Administration to Support Teachers and Researchers	<input checked="" type="checkbox"/>
<b>Name of Lead Institution:</b> St Martin's College, Bowerham Road, Lancaster, LA1 3JD	
<b>Name of Proposed Idea (Call II) / Name of Proposed Project (Call III):</b> e-CPD	
<b>Name(s) of Individual/Team (Call II) / Name(s) Project Partner(s) (Call III):</b>  Pebble Learning, e-Innovation Centre, University of Wolverhampton, Telford Campus, TF2 9FT.	
<b>Full Contact Details for Primary Contact:</b> <b>Name:</b> Sarah Chesney  <b>Position:</b> Senior Lecturer in E-learning <b>Email:</b> SAMChesney@ucsm.ac.uk <b>Address:</b> CDLT, St Martin's College, Bowerham Road, Lancaster LA1 3JD.  <b>Tel:</b> 01524 384695 <b>Fax:</b>	
<b>Length of Project:</b> 2 years	
<b>Project Start Date:</b> March 2007	<b>Project End Date:</b> March 2009
<b>8. Total Funding Requested from JISC:</b> £166758	

<b>JISC Funding Broken Down over Financial Years (April – March):</b>		
Apr06 – Mar07	Apr07 – Mar08	Apr08 – Mar09

£2192	£78696	£85870	
<b>Total Institutional Contributions: £56609</b>			
<b>Percentage Contributions over the Life of the Project:</b>	<b>JISC 66%</b>	<b>PARTNERS 34%</b>	
<p><b>Outline Project Description</b></p> <p>This project seeks to ease and/or add value to the personal administrative burden experienced by learning, teaching and research practitioners at St Martin's College, a key partner in the formation of the new university for Cumbria. It will do so by providing a flexible personal learning system which will allow colleagues to record significant aspects of their personal and professional development in ways which integrate with their existing workflows. This personal learning system will allow users to aggregate their records of learning and achievement into rich e-Portfolios to be used for a variety of professional purposes including career review, qualifications, professional accreditation and continuing development.</p> <p>The project will achieve its aims through:</p> <ul style="list-style-type: none"> <li>• Embedding it as a fundamental element within St Martin's Post Graduate Certificate in Teaching and Learning in Higher Education (PgCinHE)</li> <li>• Piloting it with staff as part of the appraisal process</li> <li>• Recording and sharing the experience of practitioners' attendance at conference through publishing to Conference Gateways, a key component within the e-portfolio system the project has chosen to use</li> <li>• Working with professional accreditation bodies (e.g. the HEA, SEDA and CILIP) to evaluate the efficacy of applications by e-Portfolio.</li> </ul> <p>In addition, the project will also implement e-portfolios to smooth the forging and enhancement of cross departmental relationships between staff within a newly formed institution.</p>			
<b>I have looked at the example FOI form at Appendix A and included an FOI form in the attached bid (Tick Box)</b>	<input checked="" type="checkbox"/>	<b>YES</b>	<b>NO</b>
<b>I have read the Circular and associated Terms and Conditions of Grant at Appendix B (Tick Box)</b>	<input checked="" type="checkbox"/>	<b>YES</b>	<b>NO</b>

## 1. Project Aims

- 1.1. This project seeks to ease the personal administrative burden experienced by learning, teaching and research practitioners at St Martin's College, a key partner in the formation of the University of Cumbria. It will do so by providing a flexible personal learning system which will allow colleagues <sup>1</sup>to record significant aspects of their personal and professional development in ways which integrate with their existing workflows. This personal learning system will allow users to aggregate their records of learning and achievement into rich e-Portfolios to be used for a variety of professional purposes including career review, academic qualification, professional accreditation and personal development.
- 1.2. The project will achieve its aims through:
  - Embedding it as a fundamental element within St Martin's Post Graduate Certificate in Teaching and Learning in Higher Education (PgCinHE)
  - Piloting it with users as part of the appraisal process
  - Recording and sharing the experience of users attendance at conference through publishing to Conference Gateways
  - Working with professional accreditation bodies (eg HEA,SEDA and CILIP) to evaluate the efficacy of applications by e-Portfolio.
- 1.3. In addition, the project will also implement e-portfolios to smooth the creation and sustainability of cross departmental relationships between staff within a newly formed institution.

The project will start in March 2007 and end in March 2009.

## 2. Lead Institution

- 2.1. **St Martin's College**, with its commitment to continuous learning, innovation and improvement as one of its core values, was awarded Teaching Degree Awarding Powers in June 2006. In August 2007 St Martin's will merge with the Cumbria Institute of the Arts (CIA), and the Penrith and Carlisle campuses of University of Central Lancashire to form the University of Cumbria.
- 2.2. **The Centre for the Development of Learning and Teaching (CDLT)** at St Martin's supports the development of innovative teaching and learning to staff across the faculties of Education, Health and Social Care, and Arts, Humanities and Social Sciences. The unit delivers the Higher Education Academy (HEA) accredited Post Graduate Certificate in Teaching and Learning in Higher Education (PgCinHE) and leads the College's e-learning and distributed learning provision. Staff within the unit are both educators and developers, ensuring that practitioners are equipped and skilled to use a range of e-learning methods.

## 3. Partners

### 3.1 Pebble Learning Ltd

Pebble Learning Ltd is a spin-off company from the University of Wolverhampton, retaining a very close relationship with it through the development of PebblePad, the University's e-Portfolio system. PebblePad gives the company a national reach across schools, colleges and universities, which will enable developments supported by the product to be implemented widely.

The benefit of using PebblePad derives partly from its increasing usage in higher education and other educational establishments from primary schools through to the university sector,

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<sup>1</sup> Hereafter colleagues using the system will be referred to as 'users'. Where users other than colleagues/staff are referenced a distinct descriptor will be offered.

and partly from its track record of innovative development and responsiveness to the needs of learners and its organisational users. PebblePad is currently being used in more than 35 HEIs and a growing number of schools and colleges.

## 4. Rationale

This project is informed by a number of national policy initiatives and documents including, the *HEFCE strategy for e-learning*, *e-Portfolios: What institutions really need to know* published by JISC, the DfES strategy *Harnessing Technology: Transforming learning and children's services*, and the new national framework for professional standards in teaching and supporting learning launched by the Higher Education Academy (HEA). The lifelong learning agenda acknowledges that all learners should be 'able to develop, record, repurpose and transfer a wide range of information about themselves electronically as they progress through different levels and episodes of learning, training and employment.' (JISC 2006).

An increasing number of professional associations are implementing policies that require the periodic evidencing of continuous professional development. There is a further trend towards the electronic submission of evidence which is in sympathy with an increasingly ubiquitous engagement with technology as part of a professionals work/learn routines. This project seeks to bring alignment between the demands of continuous personal and professional development, the ubiquity of computing technology, fixed and mobile, and the work flows experienced by HE professionals.

## 5. User needs analysis and pre-piloting

5.1 In St Martin's there have been a number of reviews of the process for collecting evidence of CPD activities. These reviews have highlighted the following:

- There is no single personal storage area for evidencing of CPD activities
- Terminology varies across college and is dependent upon a member of staff's professional background and faculty
- There is no formal alignment between the 'Personal Academic Record' which is part of the PgCinHE and other CPD activities which may take place during or after the period that staff achieve this qualification
- The collation of staff CVs for validation purposes is viewed as a different exercise from the rest of the CPD activities a member of staff may undertake. Furthermore these CVs are not seen as a marketing tool for either individuals or the institution
- Dissemination of conference attendance depends upon the inclination of a member of staff and there is no central repository or college wide method of sharing experiences
- All portfolios are currently paper-based and present limited opportunities to include alternative approaches such as audio or images, to a text-based approach.
- There is little opportunity to share specific aspects of the CPD record other than the whole record, which is often unwieldy.
- Paper-based systems do not promote sharing of ideas and experiences, limit feedback and dialogue and cannot be used to facilitate self-supporting communities of practice

Work within the college to develop student PDP process has been underway since 2000.

In the context of St Martin's College, Bloxham and Slight (2005) write:

Ward (2001) suggests that developing policy from existing practice is helpful in securing the ownership of staff. His review of a range of case studies prepared for the Generic LTSN Centre indicates the crucial need for PDP to become embedded in institutional policies and structures and not seen as bolt-on and peripheral. He talks about the 'psychological engagement' of staff and students with PDP<sup>2</sup>

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<sup>2</sup>Ward, R (2001) Developing and Implementing Institutional Policy on Personal Development Planning in Ward, R & Jackson, N Eds *Personal development planning: Institutional Case studies*. York: Learning and teaching support network quoted in Bloxham, S and Slight, A (2005) *Embedding Careers Advice and Personal Development Planning into the Social Sciences* 9th Quality in Higher Education International Seminar: Enhancing Student Employability. 27th-28th January 2005. Birmingham. <http://www.qualityresearchinternational.com/ese/papers/slightbloxhamfv.doc>

Informed by these reviews, CDLT has undertaken a small scale research project using e-portfolios to support staff undertaking the PgCinHE. Feedback from this pilot indicates that there are potential benefits for using an e-portfolio for CPD, which the e-CDP project will explore further<sup>3</sup>.

5.2 It is anticipated that staff working towards professional accreditation such as the national framework for professional standards in teaching and supporting learning launched by the HEA, will benefit from having an electronic personal learning space providing a central location to record, collate, reflect on and utilise their CPD activities.

5.3 Additionally, a recent revalidation of the PgCinHE (Academic year 05/06) indicated a number of benefits of using an e-portfolio with members of staff, amongst which were promotion of reflection, ability to re-use evidence of learning in multiple ways eg application to the HEA and appraisal. As some new members of staff apply for APEL against the PgCinHE, this project will seek to collaborate with the e-APEL project at University of Derby (also using PebblePad) to see how adoption of the APEL system can add further value to our integrated CPD process.

5.4 In addition to the above and simultaneously, CDLT have been partners in the JISC funded File-Pass project. One of the lessons learnt through the File-Pass (JISC Funded e-portfolio project [http://www.jisc.ac.uk/whatwedo/programmes/programme\\_edistributed/filepass.aspx](http://www.jisc.ac.uk/whatwedo/programmes/programme_edistributed/filepass.aspx)) project was that students were more likely to engage with an e-portfolio for personal development planning purposes where their tutors demonstrated a similar commitment to the system. In the broader context of e-learning, research has consistently shown that students will more readily engage in online activities where there is active participation from their teacher. Part of the rationale for this project is that, in addition to the obvious benefits of using an e-portfolio to support CPD, we anticipate a positive impact on student engagement with an e-portfolio as a result of their tutor's involvement.

5.5 Continuing the review of all processes relating to CPD, research and scholarly activity is of particular relevance to the institution at this time as the new university will apply for Research Degree Awarding Powers within 5 years of its inception. In 2006 a QAA Special Review of research student programmes at St Martin's College commended current provision, however the institution is continually examining means of enhancing this provision.

5.6 As progress is made towards the creation of the new University of Cumbria work teams are being established involving personnel from all three institutions. Colleagues are therefore beginning to spend an increasing amount of time developing realigned faculties and joint supporting services, whilst ensuring that the student experience is not compromised. There are clear time-constraints on this activity and a pressure to deliver a complex project which relies heavily on:

- an understanding of different institutional cultures;
- a collaborative way of working across institutions;
- the development of working relationships in new teams;
- the sharing of amalgamation, plans and discussions;
- unified approach to student learning and staff development;
- the strategic use of e-resources to meet the diverse needs and challenges of the Cumbrian context.

5.7 Once created, the new University will have major campuses in Lancaster, Ambleside, Penrith and Carlisle. It will also lead a Distributed Learning Network which will deliver Higher Education throughout Cumbria. This highly distributed model of HE delivery across a remote county demands a new way of working; for example information and comment will need to be shared quickly, widely and cost-effectively to inform decision-making and discussion. Tools need to be developed to allow this to happen. Staff will therefore need to become

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<sup>3</sup> This pilot has been accepted as a case study for inclusion in the e-Staff Development project managed by Loughborough University, the HEA and JISC <http://e-staffdev.lgo.ac.uk>

increasingly flexible and innovate in the way they manage, interact with each other, and most importantly their students. The development of staff e-portfolios will therefore assist in both the creation of the new University and the subsequent development of a 21st Century work and learning environment which is suited and adaptable to the very specific if not, unique needs and ambitions of the University of Cumbria. This is an exciting process which will present new challenges in terms of how staff CPD is supported and how this will underpin student support and progress.

## 6. Project Description

### 6.1 Overview

The e-CPD project will implement the PebblePad e-Portfolio system and examine the efficacy of using an e-portfolio system in the following specific areas;

- Staff Appraisals
- Team building across the newly formed university
- Embedding the use of an e-portfolio within the PgCinHE
- Building and trialling the use of a Conference Gateway for dissemination amongst colleagues
- Consultation with relevant accrediting bodies

Each area will have its own evaluation and feedback process which will inform further development and the wider project. It is anticipated that this approach will suit the multi-purpose nature of personal learning space, providing users with a flexible and efficient means of engaging with CPD, colleagues and, where appropriate the wider student body.

### Elements of use

6.2 The project team foresee a variety of applications of the system which require little or no development work and which will allow early piloting of certain features in selected contexts.

6.3 The project team will reuse existing self-assessment questionnaires to create 'ability profiles' which will be accessed through the system's 'learning profile' tool. The resultant learning profiles will aid colleagues' evaluation of their personal and professional development needs providing an evidence base for learners' self-reflection and development planning. Users may choose to share these profiles with mentors, peers or developers as a means of entering into developmental dialogue or to access individualised support.

6.4 Users will use the action planning tools to plan for continuing professional development, for research and scholarly activity. These may be shared using the permission system with peers, mentors and tutors to receive ongoing support, guidance and feedback.

6.5 Abilities, past experiences and qualifications, will be recorded using the system's 'record wizards'. CPD activities such as attending conferences, workshops and participating in courses can be recorded, allowing users to return to assets and record progress over time.

6.6 The CV tool may be used by learners to maintain a current and up-to-date CV which can be repurposed by staff for career development; for programme validation purposes within the institution; for external marketing to potential students; for making initial contacts with new colleagues in the newly formed university.

6.7 Assets recorded within or uploaded to the system will be aggregated as *presentational portfolios* and will form an integral part of the formative assessment process within the PgCinHE, and evidence of meeting professional standards.

6.8 Gateways will be utilised as a means of securely receiving and receipting submitted work and will be explored as a mechanism for sharing collaborative team work, creating an online environment that supports colleagues and facilitates team building across the newly formed institution.

6.9 The use of PebblePad is pivotal in this project. The system's strengths include:

- The ease of use of the system and its flexibility for a range of purposes;
- Its conformance to the IMS ePortfolio specification thereby providing a means for users to continue to develop their e-Portfolios in other compliant systems beyond the project lifecycle – this is of particular importance given that the newly formed institution will be working with FE and HE providers across Cumbria;
- The system's focus upon personal learning and the privacy and security of assets access to which is controlled by individual users;
- The ePortfolio allows for ongoing CPD and PDP beyond the programme outcome requirements and supports the theory and practice of lifelong learning.

The project will build capacity, knowledge and skills in the use of e-Portfolios with staff and practitioners, placing their needs at the centre, rather than adapting systems which have been designed with students in mind. The project will select teams of staff as case studies (preferably one group from each faculty) so that the new processes can be monitored successfully and feedback from staff can be incorporated into the next phase of the project. Some of these teams will be offered the opportunity to participate in an 'e-learning' retreat. This retreat will be a residential staff development event to train staff on the use of the software and develop approaches to using the tools that support CPD and working towards professional accreditation. The experiences of these groups and their feedback can then be monitored on an individual basis, or as a group.

The e-Portfolio will be available for all staff to use for CPD purposes, but CDLT will require students taking the PgCinHE (which is compulsory for all new members of teaching staff at St Martin's ) to use the e-Portfolio.

6.10 The project will explore mechanisms for archiving artefacts generated in other institutional learning systems (eg Blackboard VLE) for integration and reuse in the e-portfolio system.

6.11 Using the form-builder tool provided with the system the project team will evaluate and, where appropriate, repurpose existing institutional 'forms' into assets that can be saved directly to the user's personal eportfolio store where they can be shared, reviewed and aggregated like other eportfolio assets. All records created thus will adopt the IMS ePortfolio specification.

## **7. Choice of learning technology**

7.1 PebblePad is being used in 35 HEIs supporting a broad range of users in diverse learning, teaching and assessing contexts. The flexibility of the system makes it particularly attractive for this project as it is used by staff as well as students. The system has been pre-piloted with a small group of staff during this academic session. Originally developed as an eportfolio tool at the University of Wolverhampton evidence gathered from learners and teachers during implementation there, and through the JISC-funded projects ePISTLE and ELP, indicates that PebblePad provides additional tools and services which help users conceive of it as a personal learning system – an essential starting point for a system being used to support a range of personal e-administration uses such as professional accreditation, career review and appraisal.

7.2 Drawing upon the characteristics identified in H10 of the call PebblePad appears to meet the calls requirements as an appropriate choice of system:

7.3 Things that think – the system already supports input and interaction from a range of mobile devices including simple WAP/GPRS webforms, a PDA application and posting images/sound/video to the eportfolio store and a mobile blog using MMS technology.

7.4 An architecture of participation – the system is designed around collaborative processes. Whilst assets are private by default users can choose to share them with peers, mentors or friends by choice. Recipients of shared assets can be invited to comment on them or to collaborate.

7.5 Data consumption and remixing – as part of the LIPID project the SWEET.Net toolkit was developed to allow the eportfolio user to access information held in the institutional

information system. Additionally PebblePad implements a Flickr API with other tools currently in development for Amazon book data and YouTube.

7.6 A rich, interactive, user-friendly interface – this is, of course, the most obvious feature of PebblePad. Pre-piloting at this institution and feedback elsewhere indicates that the system is very easy to use making it more accessible to a greater number of staff who may have low IT confidence or competence.

7.7 Elements of social networking – the system is designed with sharing as a core process. Other users can be invited to contribute at different levels though control always resides with the originating user which is an essential feature in this context. The system uses RSS which allows items to be accessed using simple aggregation tools.

7.8 An additional consideration in choosing this system is its conformance to the IMS ePortfolio specification thereby providing a means for users to continue to develop their eportfolios in other compliant systems beyond the project lifecycle. PebblePad also implements a range of other open standards including LIP, RSS and HR-XML.

7.9 PebblePad is developed on a Service Orientated Architecture utilising .Net web services to share and consume information. This project does not require any technical development work in the initial phases, other than that necessary to secure integration with existing institutional systems. However, in response to user feedback as the project develops it may be valuable to develop some bespoke application or process interfaces. Any technical development carried out as part of this project will properly documented and tested in concordance with the Software Quality Assurance (QA) and Open Source Maturity Model (OSMM) development guidelines. Any source code will be released under an appropriate open-source licence for reuse within the JISC community.

7.10 As the project is an implementation through a case study, all the people involved, be they practitioners, advisers or members of the project team, will be encouraged to document their perspective using PebblePad, so that we can maximise our learning about the processes and outcomes.

## 8. Outcomes, benefits and dissemination

### 8.1 Outcomes & benefits

This project will inform future implementations of e-Portfolios to support CPD across the HE sector, whilst providing real tangible benefits for practitioners at the lead institution. The prime outcome will be a significant implementation of an electronic tool to support personal e-administration for a range of CPD purposes and across all faculties within and HEI. Specifically this project will deliver the following benefits:

**For the individual** – a highly flexible and efficient means of storing, referring to, reflecting on and demonstrating their CPD activities. The tool will assist in goal setting, support learning and foster communities of practice across a dispersed institution.

**Institutional** – for the institution there will be the opportunity to see the benefits that a 'fit for purpose' system can provide, namely, efficient use of staff time; the easing of administrative tasks; the linking of a dispersed working community through e-resources; a manageable and accessible framework for CPD which is consistent across the institution which clearly feeds into the student experience. It is anticipated that the effective use of an e-portfolio system by staff will encourage an e-portfolio system to be used by students, thus keeping abreast of national objectives.

**Wider community** – for the wider community there will be benefits seen regarding the efficacy of electronic submission of portfolios for professional accreditation; the example of implementing an e-administration system institution wide to support teaching, learning and research. The project will share at a national level the experiences of the project and the lessons learnt which will contribute to the sector's knowledge base. It will be an exemplar of good practice and a practical case study of implementing change at both an institutional level and at a personal level which will be of value to the HEI sector.

### 8.2 Dissemination

A full communications plan will be prepared at the start of the project. The understanding gained and the technology developed through this project will be of significant interest to the JISC community and the staff and educational development community. There are both technical and non-technical audiences for dissemination and the project will explain the benefits of the project work for each audience at appropriate conferences and special interest groups. The communications plan will include:

- A series of case studies representing the different applications of the system;
- A report evaluating the use of e-portfolios as part of an application process to a national body, including lessons learnt and recommendations for future development;
- The project will report on the effectiveness of the staff retreat as a model for innovative staff development;
- An evaluation of the users' experience reporting in particular on their engagement with the system, their perception of contribution to easing the administrative burden and any unanticipated uses of the system to support personal e-administration;
- Ongoing dissemination will be carried out through a project website;
- Dissemination of the project will take place in the forthcoming University of Cumbria journal Practitioner Research in HE, published by CDLT and other relevant journals;
- Attendance and papers at relevant conferences eg Alt-C, SEDA and the HEA Annual Conference;
- Workshop day hosted at the lead institution;
- Support pack for Busy Practitioners available online;
- Contribution to programme meetings, special interest groups and conferences particularly around e-Portfolios and educational development.

## 8 Budget

	JISC Contribution Requested			Institution Contribution		
	March 07	2007/08	2008/09	March 07	2007/08	2008/09
Project Manager 0.6 Grade 8		27902	28738			
Project Administrator 0.4 Grade 6		11478	11822			
Staff Training – workshops, individual mentoring, workshop development, training for external examiners		6200	8000			
Technical Consultancy		2025	2025			
Licences & hosted solution		3850	3850			3850
Modelling & development		6435	6435			
Travel & subsistence	500	2800	3000			
Equipment (e.g .mobile devices for evaluation)	1692	2500	2500			
Dissemination Activities – production of video case studies, CPD conference (run by St Martin's) best		5500	8500			

practice guidelines; attendance at conferences						
Evaluation & research (including writing of materials, and external evaluation and research assistants)		4000	5000			
Other including use of rooms & facilities (Overheads @ 66% on salary costs)					25990	26769
E-learning retreat		3800	3800			
Other (catering for all staff development events)		2200	2200			
<b>Total</b>	<b>2192</b>	<b>78696</b>	<b>85870</b>		<b>25990</b>	<b>30619</b>
<b>Grand Total</b>			<b>166758</b>			<b>56609</b>

## 9. IPR

IPR generated by the project will be considered a community resource and will be distributed to the learning community in the most effective means on advisement from the JISC.

## 10. Sustainability

It is the intention of the lead institution to purchase a sufficient number of licences from Pebble Learning to continue the project until at least July 2010 (see budget). By this time the e-administration system will be fully embedded into CPD activities and a key part of the research and scholarly activity process. It is anticipated that the value of an e-portfolio system which allows for integration with other institutional systems will increase over time, and that just as the VLE has become a major part of the teaching provision, this tool will also become recognised as key to individual staff success and to an efficient and supportive institutional approach to CPD, communities of practice and research. Additionally, the post of Project Manager will be based on an internal secondment of a current member of St Martin's staff thus ensuring continuity and maximising institutional benefit.

## 11. e-CPD Project schedule

12. Date	13. Action	14. Description	15. Main Outputs
Mar-July 07	Set-up and development phase	Project initiation; Communications plan; analysis of existing personal learning space; Pilot 1 using e-portfolios for appraisals; e-learning retreat for staff development; Pilot 5 initial contact awarding professional bodies (ongoing process & action and evaluation dependent on conversations)	Detailed project plan Communications plan Appraisal evaluation Analysis and evaluation of effectiveness of retreat Appointment of project manager
Jul-Sept 07	Ongoing review Identify groups of staff who will Pilot 2 use of e-portfolio for team building exercises	Amend software on basis of appraisal evaluation from Pilot 1; further development work; ongoing conversations with awarding professional bodies; contact e-Apel project.	Dissemination of initial appraisal work; 1 <sup>st</sup> report to project board Feedback into project outcomes from e-Apel discussions Ongoing dissemination through project website
Sept 07-Sept 08	Pilot 3 Introduce e-portfolio into the PgCinHE (Jan 08); Conclude discussions with professional awarding bodies; Pilot 4 Development of conference gateways Exploration of potential to integration with other institutional systems	Amend software on basis of appraisal evaluation from Pilot 2. Monitor and evaluate use of e-portfolio in formative assessment for staff; continuous developmental work in response to feedback from staff teams; PgCinHE tutors & students; staff to pilot use of conference gateways to disseminate and share CPD conference activities;	Training materials for staff use; case studies; project contribution to University of Cumbria's application for Research Degree Awarding Powers. 2 <sup>nd</sup> report to project board Dissemination of Project 2 & 3 at relevant conferences eg Networked Learning Conference
Oct 08 – March 09	Modelling and refinement of all aspects of the project. Dissemination and evaluation	Amend software on basis of appraisal evaluation from Pilot 3 & 4. Communications activity with wider community	Disseminate outcomes from dialogue with professional awarding bodies Disseminate project 4 Project reports to JISC Final Report to Project board Dissemination through means identified in Outcomes and Dissemination Section Papers at ALT-C, SEDA conference, & other relevant conferences
Mar 09-July 2010	Institution buys licences for staff	Sustainability of project through purchase of licences from Pebble Learning.	

## 12 Evaluation Plan

The project manager will be responsible for writing reports in Sept 07, Sept 08 and at the end of the project. These reports will be available to JISC and the project management board. Janet Strivens from the Centre for Recording Achievement has agreed to be an external evaluator to the project and will provide a written evaluation of the project in March 09. This project will be evaluated in terms of the learner's experience, by qualitative interviews with a sample of participants, followed by focus or discussion sessions to enable all participants to explore the effectiveness of the project. The staff development approach adopted by the project will also be evaluated.

## 13 Project Management

The management of the project will be through a Project Board containing the responsible staff from the partner organisations. Primary responsibility for delivering the project rests with Sarah Chesney, who will take on the role of the project's Executive. The project is supported by key staff from St Martin's College, including , Professor Susan Bloxham (Head of CDLT)Melissa Shaw (Deputy Head of CDLT) and Dr Hugh Cutler (Dean of Research), Peter Boyd, (Programme leader of the PgCinHE and responsible for the college's response to the HEA Professional Standards), Phil Molyneux (Head of IT Services) and Peter Armer (Director of Finance) and James Howard (Senior Lecturer in Learning and Teaching with CDLT). The Project Board will receive regular highlight reports from the Project Manager and will hold a formal meeting to approve progress to the next phase of delivery. It will consist of:

- Sarah Chesney (Executive)
- Peter Boyd (Project Champion)
- Melissa Shaw (Project Champion)
- James Howard (Project Champion)
- Shane Sutherland (Senior Supplier, Pebble Learning Ltd)
- Rachel Karenza Challen (Pebble Learning Ltd)
- Colin Dalziel (Pebble Learning Ltd)

## 14 Key Personnel Involved in the Project

**Sarah Chesney** is a senior lecturer in e-learning with CDLT. She has an MEd in e-learning and has extensive experience in online communication and networked learning. She is St Martin's lead in the File-Pass Project, is module leader for a Masters in education module 'Facilitating E-learning'. Sarah is a tutor on the PgCinHE

**Melissa Shaw** joined St Martin's College, as Deputy Head of CDLT, in mid 2006. Her background includes human resources/personal and professional development roles, research, HE as well as 11-19 teaching, national project management, and leading the development of, and implementing key elements of TQEF funded institutional learning and teaching strategies. She has 22 years experience of working in HE and her particular interest is in equipping HE staff to address and promote the challenging agenda for 21<sup>st</sup> Century higher education.

**Colin Dalziel** is a qualified teacher in HE and has extensive experience with learning technologies. He was involved in the Broadnet Project from 1996-99; this project led to the development of one of the very earliest VLEs, WOLF. Colin was heavily involved in the deployment of WOLF across the University which now boasts over 20,000 active users of the VLE. Colin has been involved in a number of innovative research projects including the educational application of PDAs, SMS Messaging, computer aided assessment and Learning Avatars. Colin also acted as a technical advisor for the JISC-funded X4L project 'e-Studio'. Recently he has managed or worked on the JISC-funded projects ePISTLE, LIPID and MELaS.

**Rachel Challen** is a qualified teacher who has worked with innumerable colleagues in schools, colleges and HE as an e-mentor. Rachel's background is in hospitality management but she is now very much an e-learning expert teaching resource-based learning at University as well as specialising in WebQuests, Treasure Hunts and Digital Story-Telling. Rachel has managed a number of e-mentoring projects and is currently supporting teachers and learners on the regional ePortfolio project ePISTLE. Rachel brings a unique knowledge of the user perspective and user requirements to this project.

**Shane Sutherland** is a former teacher-educator with extensive experience of professional staff development in pre-16, post-16 and HE contexts. He has a First Class degree in Further, Adult and Higher Education and a Master's in Quality Management. Shane was instrumental in introducing interactive whiteboards to university teaching; designed a 'future' classroom and was an early innovator in the use of VLEs. He has led two projects to redesign PGCert curricula for blended learning; has hosted a number of learning retreats and is involved nationally and internationally in ePortfolio developments. Shane is closely involved with the ePortfolio SIG; contributes to national debate on interoperability; is a member of the Creative Thinking Group and has previously managed or worked on the JISC-funded projects ePISTLE and LIPID.

**James Howard** is an experienced university lecturer and researcher, currently at the end of a PhD into the form, content and integration of media technologies, based on a research project sponsored by the Guardian Media Group. James has designed and delivered courses at all levels of undergraduate and postgraduate education, with a specific focus on advanced and applied research methodology and cultural studies. Now working as Senior Lecturer in Learning & Teaching Development at St Martin's College, James is further developing his previous experience of designing e-resources and conducting research into the use of blended learning modules via the Blackboard VLE. James also writes and delivers a number of CDLT Staff Development workshops and is a tutor on the PgCinHE

## Appendix A: CVs of lead personnel in the bid

### Curriculum Vitae

Ms Sarah CHESNEY



Senior Lecturer in E-Learning, CdlT

#### Employment History

At SMC:

Title	School/Division	Faculty	Start Date
Senior Lecturer in E-learning	CDLT		Mar-05

Current responsibilities:

Programmes	Various work with programmes supporting the role out of e-learning Tutor on the PGC in HE Module leader for MA in Education, Facilitating E-Learning
Research Supervision	
Course Development (including validation panel work)	CDLT workshops and courses
Other (please specify)	
Main Subject/Interest areas	e-learning

Previous employment:

From	To	Job Title and summary of duties	Employer
1995	2004	Freelance Consultant & self employed	e-cademia
1994	1995	Head of PR for publishing company	Harry N. Abrams
1990	1994	Director and head of museum retail	A.Zwemmer
1988	1990	Book & print buyer	Royal Academy of Arts
1987	1988	Bookseller	Dillons

#### Academic and Professional Qualifications

Date	Award	Grade/Level	Awarding Body
1986	BA (hons) American Studies	II(i)	University of Manchester
2004	MEd in e-learning		University of Sheffield

#### Current Study and Research

	Funding source
Staff Development Undertaken	Online assessment delivered by Dr Sharpe from Oxford Brookes University 2004 MLEs – a workshop run by JISC 2005 E-portfolios – CETIS pedagogy forum 2005 Digital Repositories – ALT-C Spring Conference 2004 Attendance at Alt-C in Manchester 2005 Attendance at Networked Learning Conference 2006 E-learning workshops for CDLT - teams and individual members of staff.
Staff Development Delivered	Part of the Post Graduate Certificate in Teaching and Learning in Higher Education team delivered by CDLT. Module Leader for 'Facilitating E-Learning' MA in

**Funding  
source**

Main Subject/Interest areas	Education E-learning and online assessment. Online collaboration and communication.	
Teaching and Learning Publications		
Planned research/scholarly activity during next 12 months <b>(including work for publication under editorial review)</b>		Chapter on Computer Aided Assessment, book to be published by Open University Press Poster at Alt-C 2006 Case study reports for e-Staff Development Loughborough University – 1. Podcasting for enhanced CPD & 2. E-Portfolios for Staff Development



<b>Job Title</b>		Deputy Head of the Centre for the Development of Learning and Teaching, St Martin's College
<b>Qualifications</b>	1994	MA Teaching and Training Studies, University of Central Lancashire
	1975	PGCE Social Studies, University of Bath
	1974	BSc (Hons) Sociology, Uppers Second Class, University of Bath
<b>Membership of Learned Societies</b>	2002-	Registered Practitioner of the HE Academy
	2001-	Member of Staff and Educational Development Association
<b>Recent Appointments</b>	2000-2006	Principal Lecturer/Learning Development Adviser, Learning Development Unit, University of Central Lancashire (UCLAN)
	Feb 2005-May 2006	Academic Development Facilitator, Faculty of Science, UCLAN (0.5 secondment)
	Feb-July 2004	Deputy Director for The Centre for Recording Achievement (0.5 secondment)
	1998-2000	Key Skills Adviser, Department of Education and Social Science, UCLAN
<b>Main teaching activities</b>	2006-	Contribution to teaching of St Martin's PGC
	1998-2006	Contribution to teaching of UCLAN PG Cert. in Learning and Teaching in HE, and PG Cert. in Research Student Supervision programmes; Level 3 Student Support and Guidance module; Level 2 Planning Your Career module team; Module Leader for Level 2 Skills for Employment module
<b>Positions of responsibility</b>	2006-	Institutional Correspondent at St Martin's for the Centre for Recording Achievement
	2004-	Chair, UCLAN Progress File/PDP Advisory Group
	1999-2006	Member, UCLAN Learning and Teaching Committee and Strategic Management Group
	2000-2004	Member, UCLAN Central Induction Working Group
	2000-2002	Chair, UCLAN Stage One Working Group (L&T Strategy)
	1997-2001	Member, UCLAN Scheme Management Committee for the PG Certificate in Teaching and Learning in HE
<b>Current research</b>	2005-	UCLAN Pedagogic Research Forum funded project investigating postgraduate research students' attitudes to their training
<b>Recent consultancy activities</b>	2005	UK GRAD (£3000)
	2004	UK GRAD (£3000)
	2004	British Council (£3000)

	2004	GLTSN (£3000)
<b>Refereed Publications</b>	2003	Shaw, M. Healy, R. Pilkington, R. and Houghton, P. "Pioneering Employability within the Curriculum", SEDA Special 14, August 2003
<b>Unrefereed Publications</b>	2006	Shaw, M. "2005 Update on emerging practice on the use of Personal Development Plan Postgraduate Researchers (PGRs)" UK GRAD. Cambridge
	2004	Jackson, N. Gough, D. Dunne, E. & Shaw, M. "Developing an infrastructure to support a informed approach to Personal Development Planning", (GLTSN) now HE Academy Shaw, M. Brown, T. and Pearce, E. A national review of emerging practice on the use of development Planning for postgraduate researchers", UK GRAD. Cambridge Jackson, N and Shaw, M. "Building a database of PDP institutional evaluation studies to implementation: Evaluation of the initial search and find strategy developed to identify institutional PDP evaluation studies" GLTSN
	2002	Houghton, P. and Shaw, M. "Debating The Design of Degree Programmes by focusing c Retention", Issue 1 "Exchange" magazine, NCT, LTSN, ILT, JISC
	2000	Shaw, M. Malik, A. and Cronshaw, S. 'Key Skills In Higher Education: The Central Lanca Skills Contract' 1998-2000". University of Central Lancashire
	1987	Towner, M. "Learner Psychology and Training". Taylor Francis.
<b>Presentations, conferences, workshops, exhibitions, performances, etc</b>		
	2005	Invited workshop UK GRAD North West Hub event, Manchester
	2004	Invited workshop UK GRAD national conference, London

## Rachel Karenza Challen

Business Administration - Bachelor of Arts (University of Wolverhampton)  
Postgraduate Certificate in Post Compulsory Education (University of Wolverhampton)  
Postgraduate Certificate in Hospitality Management (University of Birmingham)

27 Woodhouse Road  
Broseley  
Shropshire  
TF12 5HL

Telephone 07793 717208  
Email [rachel@pebblelearning.co.uk](mailto:rachel@pebblelearning.co.uk)

Outstanding success in the eMentoring of staff and students raising both awareness and confidence in the range of technologies available. Thus enabling implementation and integration of technologies in the learning environment.

### Key Skills

Solid teacher practitioner in a wide range of learning establishments

Proven ability to support both teachers and students in the development of eLearning

Excellent organisational skills for project managing

Knowledge of current projects promoting the use of ePortfolios in curriculum integration

### Recent career

eMentor - Pebble Learning

June 03 - Ongoing

- Mentoring small teams of teachers and students in ePortfolio use and implementation
- Using technology to develop new ideas for teaching resources
- Contributing to professional reports by researching and presenting academic theories and applications
- Running workshops in various technology applications for FE and HE teachers

Student Lecturer - Birmingham College of Food

Sept 02 - June 03

- Delivered both FE and HE classes in the areas of Hospitality and Business.
- Worked with colleagues to plan lessons in accordance with schemes of work.
- Designed and produced high quality resources to assist learners with both their educational development and their summative assessments
- Worked with peers to reflect upon learning encounters and the factors contributing to learning outcomes.

Lecturer - Stafford College, Stafford

Sep 01 - June 02

- Devised, planned and delivered schemes of work both independently and in collaboration with colleagues to both HE and FE students
- Assessment, monitoring and recording of student progress and attendance
- Promoting and maintaining good conduct and behaviour in accordance with college procedures.

Research Administrator- University of Wolverhampton

Jan 01 - Nov 01

- In conjunction with the Professor of Management implemented a new Centre of Enterprise Excellence within the University
- Researching contemporary business ideas and writing practitioner reports for the Centres publication
- Made use of all multi media packages available both within the university and external sources

#### Recent Publications

Eportfolio in the UK: Emerging Practice (2005) in The Handbook of Research on ePortfolios. Jafari and Kaufman. The Ideas Group Inc PA.



- Assessment and Evaluation in Education
- Quality Management in Educational Contexts

## Recent Conference Papers

**Developing and implementing an ePortfolio System** (2006) Learning Sciences Research Institute. Nottingham 18 October 2006

**ePortfolios and personalising learning** (2006) Europortfolio Conference. Cambridge 12-13 October 2006

**ePortfolios: a personal space for learning** (2006) ALT-C. Edinburgh 4-6 September 2006

**ePortfolio: A Means of Enhancing Employability and the Professional Development of Engineers** (2006) Engineering Education Conference. Liverpool 24 July 2006

**Yorkshire and Humberside Regional Support Centre Annual Conference (Workshops and Vodcast)** 19 June 2006

**ePortfolios and eDentity (Expert Facilitator) I before E Conference**, London: Eduserve 18 May 2006

**Telling Educational Stories with ePortfolios** (2006) Excellence in Education, Wolverhampton 10 May 2006

**Telling Stories: ways of working with eportfolios** (2006) Social Skills and Social Software Conference. Salzburg, Austria. 24 May 2006

**ePortfolios and PDP** (2006) The Journey into HE Conference, King's Hill Conference Centre, Kent. 30 March 2006

**Not Just Flashy** (2005) European ePortfolio Conference, Cambridge. 27 October 2005

**User led interoperability: a demonstration of interoperability for learning** (2005) European ePortfolio PlugFest: Cambridge. 26 October 2005

**Telling Stories: ways of working with ePortfolios Post16** (2005) British Educational Communication and Technology Agency Conference: Manchester MICC. 01 November 2005

**Telling Stories: ways of working with ePortfolios** (2005) Using ICT to develop an integrated and simplified approach to recording skills and achievement - Merseyside 14-19 Network: Jaguar Conference Centre. 01 November 2005

**Not just flashy!** (2005) European ePortfolio Conference: Cambridge. 27 October 2005

**Interoperability: possibilities and probabilities** (2005) European ePortfolio Conference: Cambridge. 27 October 2005

**User led interoperability: a demonstration of interoperability for learning** (2005) European ePortfolio PlugFest: Cambridge. 26 October 2005

**An ePortfolio for Life** (2005) Personalising eLearning Seminar Learning Lab: Telford. 15 June 05

**ePortfolios and VLEs** (2005) West Midlands Regional Support Centre Annual Conference: Wolverhampton. 17 June 2005

**ePortfolios Supporting PDP** (2005) Higher Education Academy-ICS 'Personal Development Planning' Seminar: University of Sheffield. 23 May 2005.

**Interoperability: the practical and the practicable** (2005) Centre for Recording Achievement Seminar: Sheffield Hallam University. 16 May 2005

**An ePortfolio for Life.** (2005) Learning Innovations Forum d'Innovation d'Apprentissage (LIFIA): Vancouver, Canada

## James Colin Dalziel

Bachelor of Science (EIMC Bradford)

Postgraduate Certificate in Education (Learning and Teaching in HE Wolverhampton)

16 Deuxhill Close Dawley Telford Shropshire TF4 2RA			
		Telephone: Email:	01952 401412 colin@pebblelearning.co.uk

High level of understanding and experience in the use of technology to support learning from both the learner's and the teacher's perspective.

### Key Skills:

Detailed knowledge of current elearning systems and their application;

Ability to work as a part of a team and individually as required;

Project management and planning abilities;

Knowledge of the UK education sector.

### Recent Career:

Director and co-founder - Pebble Learning Ltd

April 03 - Ongoing

- Operations Director - responsible for day to day operation of the company
- Supporting the use of ePortfolio for learning and assessment
- Offering expert consultation to clients relating to elearning and web based systems
- Supporting the development of web-based courses and face to face staff development activity relating to the Internet as a teaching tool.
- Developing and delivering bespoke elearning courses for teaching staff in H.E. and F.E.

eLearning Project Officer

March 03 - December 06

Centre for Excellence in Learning and Teaching, University of Wolverhampton

- Supporting the use of technology across the department and the institution
- Advise on the development of the institutional VLE
- Advise staff on the use of computer aided assessment software
- Offer technical assistance to placement students developing elearning resources

Network Learning Development Officer - IT Services

April 99 - February 03

- Supporting the use of technology across the institution
- Being the first point of contact for staff using the institutional VLE
- Developing and delivering staff development courses in the use of the VLE to support student learning.

Courseware Development Officer - WBS

September 96 - March 99

- Responsible for creating the first online learning materials validated at the University

- Advising on functionality within the Broadnet VLE
- Working with academic staff to develop appropriate strategies for the use of technology.

### Current Projects

- Creating a web presence for the Black County School Improvement Service ([www.bcsip.org](http://www.bcsip.org))
- Development of the PebblePad eportfolio system for supporting students' personal development processes
- Courseware design and curriculum enhancement (Post-graduate Certificate in Professional Development - North East Wales Institute)
- eMentoring projects for teachers supporting the development of elearning resources and integration into the curriculum - Hugh Baird College, Liverpool; Sandwell College, Testbed Project

### Conference Papers

Interoperability: possibilities and probabilities. (2005) European Institute for E-Learning European ePortfolio Conference. Cambridge

Texting and Retention: (with Traxler) (2004) Association for Learning Technologies ALT-C Conference: Blue skies and pragmatism - learning technologies for the next decade. University of Exeter

Ability Profiling: Identifying Strengths and Developing New Abilities. (with Sutherland) (2004) Universities and Colleges Information Systems Association. University of Exeter

Broadening the appeal of technology supported learning to staff. (with Sutherland) (2001) Association for Learning Technologies ALT-C Conference: Changing Learning Environments. University of Edinburgh

### Recent Publications

Eportfolio in the UK: Emerging Practice (2006) in The Handbook of Research on ePortfolios. Jafari and Kaufman. The Ideas Group Inc PA.

**Appendix B**  
Letters of support

To whom it may concern

Wednesday 23<sup>rd</sup> November 2006

Dear Sir/Madam,

JISC Capital Programme: Users and Innovation: Personalising Technologies: Call 3 -  
Implementation of Personal e-Administration to Support Teachers and Researchers

St Martin's College welcomes the opportunity to lead the proposed e-CPD Project designed to implement and enhance an e-portfolio system (PebblePad) for staff with higher education teaching and learning support roles, to assist them in engaging with their personal continuing professional development, with particular reference to the national Professional Standards.

The proposed project (in response to JISC CIRCULAR 4/06) builds on our recent successful collaboration in the JISC-funded regional FILE-PASS Project related to distributed e-learning and the use of e-portfolios to support learning. The proposed e-CPD Project provides an important opportunity to explore the potential for e-portfolios to provide personalised support for staff learning in the lead up to the creation, and early years of the new multi-campus/site university for Cumbria.

The e-CPD Project corresponds well with the College's strategic objectives in relation to developing flexible and distributed learning as a means to widening participation in the low participation neighbourhoods of Cumbria. The new university for Cumbria (incorporating St Martin's College, Cumbria Institute for the Arts and the Cumbria-based elements of the University of Central Lancashire) is set to come into being on 1<sup>st</sup> August 2007, and is designed from the outset to take a higher education experience from its central campuses to a dispersed population through the use of a Distributed Learning Network.

The activity proposed in the project will contribute towards capacity building in relation to the use of e-portfolios to support learning, development, and collaborative working amongst the staff of the dispersed component institutions/the new University. Indeed, the project will be vital in accelerating the experience, knowledge and skills underpinning the development of the university.

The institution is fully in support of the proposed project.

Yours Sincerely,



Dr Neil Simco  
Assistant Principal



Carlisle CA1 2HH. Telephone: 01228 616234 Fax: 01228 616235

Principal & Chief Executive: Prof Christopher J Carr, MA, BCL



Sarah Chesney  
Senior Lecturer in e-learning  
CDLT  
St Martin's College  
Lancaster

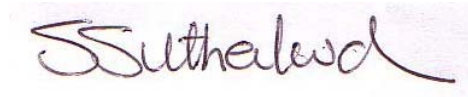
22 November 2006

Dear Sarah,

I am writing to confirm that Pebble Learning are delighted to be invited to work with you on this very interesting and important project. As you know PebblePad is being used by both students and staff in an ever growing number of institutions, though it is a regret that colleagues staff often come to the system by accidental choice rather than through some institutionally supported process.

I remain convinced that the best way to meet the myriad eportfolio agendas for students is to find meaningful ways to encourage staff use of systems such as this and key to that will be reducing their work burden rather than adding to it. We very much look forward to working towards this aim with you on this project and I hope that our technical and pedagogical experience will be valuable to you and your colleagues at St Martin's College.

Kind regards

A handwritten signature in black ink that reads "Sutherland". The signature is written in a cursive style and is positioned above the typed name and title.

Shane Sutherland  
Development Director