



Project Information			
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Lead Institution	University of Oxford		
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Programme Name (and number)	Transforming curriculum delivery through technology		
Programme Manager	Lisa Grey		

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Interim Reporting Template

Project name	Cascade: University of Oxford
Report compiled by	Marion Manton and Bridget Lewis
With contributions from	Rebecca Lingwood, Sean Faughnan and Nicola Warren
Reporting period	01 November 2008 - 31 July 2009
Section One: Summary	
<p>The Cascade project aims to harness technology to enable the Department for Continuing Education to respond to the challenges of the government's Equivalent or Lower Qualification (ELQ) policy. This remit is very broad, especially taking into consideration the wide variety of courses the Department offers in terms of academic level, format of presentation, subject area, and the diversity of our students. In order for the project to be of most benefit to the Department it was necessary to narrow its focus to areas where the application of technology offers the greatest impact, either in terms of savings in time and/or money, expanding our reach to new audiences, improving the student experience or has broad application across a number of activities.</p> <p>After a period of review and research, stakeholder consultation and other activities the main foci of the project have been identified as:</p> <ul style="list-style-type: none"> • VLE support for courses, where appropriate, incorporating online assignment handling and linking our student and course information system with Moodle to increase efficiency for delivering courses; • development of customisable resources for delivery of generic content; • extension of online enrolment and payment for courses; and • review of the course design process to ensure appropriate use of technology is considered from the start rather than treated as an afterthought once a course has been approved. <p>With the scope narrowed and defined, good progress has been made in identifying stakeholders' needs, developing specifications, undertaking initial pilot studies and identifying and preparing for later stages of the project.</p>	
Section Two: Activities and Progress	
<p>The main tasks for this reporting period were to:</p> <ul style="list-style-type: none"> • Set up the project (including appointing a Research Officer); • Review and research; • Refine the project scope; • Start technical developments; • Undertake initial pilots; • Start defining models. <p>The project got off to a relatively slow start due to a delay in recruiting the project Research Officer, Bridget Lewis. However, since Bridget joined the team at the end of April 2009, the project has made considerable progress. With the scope of the project now clearly defined, the project workpackages have been revised to better reflect planned activities for the rest of the project.</p> <p>Due to the cyclical nature of the project, within the reporting period almost all the workpackages have commenced, and those numbered 1 to 3 (project set up, review and research, develop and refine scope) have been completed.</p>	

Review and research, developing and refining scope

Initially, 21 sub-themes were identified through a review of the literature, consideration of the Department's 10-year vision, the project requirements and interviews with key stakeholders in the Department. These can be seen on the project website (<http://cascade.conted.ox.ac.uk/outputs.php>) in the project schematic dated February 2009. It was clear from the start that while all the areas identified had the potential to be of value to the Department, it would not be possible to address them all within the timescale and resources of the project.

In order to prioritise the original sub-themes, the team analysed each one for impact and achievability, and compared them to stakeholder requirements, which were elicited through a variety of methods including brainstorming, interviews, surveys, and focus groups. The consultation activities with stakeholders highlighted their main needs as:

- improvements to the current online assignment handling system;
- coherent course support and content development both in administrative and subject-related areas;
- easy to use systems and processes;
- consideration of the use of technology at an early stage in the course proposal/design path; and
- training or guidance on using any technology that is implemented.

As a result of this, the team was able to designate some of the sub-themes as outside the project's scope and amalgamate others. The redefined scope now focuses on:

- development of an improved online assignment submission system;
- extension of VLE support for courses where this will add value for students and improve efficiency in running the course;
- creation of customisable content for delivery of generic skills training;
- extension of online enrolment and payment for courses; and
- reviewing procedures to ensure that the use of technology to support course delivery is fully considered in all new course proposals.

An updated version of the project schematic, dated June 2009, reflecting the current focus is available on the project website (<http://cascade.conted.ox.ac.uk/outputs.php>).

It is worth noting that parallel development on many of the sub-themes that were deemed out of scope for the Cascade project continues elsewhere in the Department, although not all are likely to be completed in the life of the project, many will have an impact on the deliverables and outcomes of Cascade as these activities overlap significantly with those of the project. As such, while Cascade does not have the resources to evaluate, monitor or disseminate these developments, they may contribute to the work of the project as it progresses and will be reported on as appropriate.

Online assignment submission

Online assignment submission was recognised as a high priority for the project early on, due to the clear benefits it offers the Department both in terms of time and cost savings and in the potential to offer an improved service to students. A legacy online assignment submission system is currently being used by several programmes, but this has needed replacing for several years and is not scalable for wider adoption across the full range of the Department's course offerings.

The team started by considering a range of possible systems both internal and external to Oxford, including Moodle, which is currently used as the Department's main VLE. This made it clear that the most effective route forward would be to adapt the standard Moodle assignment handling module to provide all the functionality required.

The project team has reviewed the functionality of the Department's current bespoke assignment system (CASS), our current and potential future requirements for assignment handling and the existing functionality of the Moodle assignment module in order to map the functions required on to what Moodle currently provides and what features need to be developed. From this, in consultation with the relevant stakeholders, a technical specification for the new online assignment submission system has been produced. Technical work is currently underway to implement essential functionality that is not available in the standard Moodle assignment module. In order to allow more time for development and strategic roll out, it was decided to push back the date of the pilot implementation from the start of autumn term 2009 to early 2010. In addition, consultation among tutors has revealed wider issues around perceptions of onscreen marking. The longer development timeframe will allow us to address these factors through training and interaction with a demonstration user interface while the details of the backend functionality are finalised, reviewed and tested.

Update: The team has spoken to Gus Cameron at the e-bio labs project, while there are not obvious points of collaboration (we are using assignment submission in Moodle in very different ways) we have agreed to stay in touch in case this changes as the projects progress

VLE support for courses

In recent years, the Department has offered VLE support for courses in three main areas: fully online courses, blended learning and face-to-face learning. However, while the first area is well supported and developed, use of a VLE to underpin the other two has generally taken place on a more ad hoc basis and is only used on a minority of programmes that might benefit from this provision. Addressing this in a more systematic fashion was always intended to be a major focus of Cascade. However, identifying which approaches to take has been a significant challenge. Of the original 21 sub-themes, 15 were related to this area and much of the scope refinement focussed on prioritising our approach. To do this, our needs assessment activities included mapping best practice from our existing activities and the literature, consulting current and potential users of the system and targeting key groups of students to better understand their requirements.

Many of the Department's professional development (face-to-face, blended and fully online) programmes are already supported with Moodle. One of these programmes, the Postgraduate Diploma in Paediatric Infectious Diseases (<http://cpd.conted.ox.ac.uk/PID>), is a new blended learning programme that runs over two years with a short residential course held in Oxford in June of each year. This June's course was an ideal opportunity to get feedback from students, by questionnaire and discussions, on their views of the Moodle support provided for their programme. In conjunction with the course's online evaluation forms, these activities gave us a snapshot of professional students on an award-bearing programme, especially their level of technological awareness prior to taking the course and their experiences of using the technology as a medium for learning. Work is ongoing to obtain data from other student groups across the spectrum of courses offered by the Department.

From all these approaches, we are starting to specify the features that will be incorporated into the Moodle support sites and to develop initial templates for use in pilot studies. Some of these features

are generic across all courses the Department offers, while others are specific to groups of courses, whether this grouping is by level and type of accreditation, format of presentation or subject area. This suggests we will need to develop a set of template Moodles for each of these different groups. A selection of courses have been identified as suitable for pilot studies.

Over the summer, a short pilot study was run with the one-week Global Health summer school (<http://cpd.conted.ox.ac.uk/globalhealth>), to give an insight into providing VLE support for professional learners studying a short non-accredited (essentially face-to-face) programme. The project team is currently planning further pilot studies to get sufficient feedback on which features are most useful and whether there are any technical problems with accessing the information. Our main pilot study course for the autumn term will be the Undergraduate Diploma in Archaeology (<http://awardbearing.conted.ox.ac.uk/archaeology/udba.php>). This will enable us to focus on students studying an award-bearing programme for personal interest and development.

The project team is also working on providing VLE support for tutors of our weekly classes programme. The weekly classes programme is one of the Department's largest and well established programmes and currently offers 342 individual courses (<http://www.conted.ox.ac.uk/courses/results.php?Category=400>), which are delivered entirely face-to-face in 2-3 hour sessions over a period of 10 or 20 weeks. Whilst this represents a significant number of students for the Department, initial consultation suggests that it is unlikely that VLE support across the whole of this portfolio would offer significant benefits to tutors or students, due the volume of courses and the rapid turn around of subjects. By starting with tutor support at this stage, we hope to explore how using Moodle to support staff more widely in the Department might work, and to use this as a bridge to the potential introduction of online assignment submission for these courses via the Moodle interface.

Generic content

A clear finding, from our initial stakeholder engagement activities and the review of new course proposals, is the amount of generic content that is being created by different teams across the Department. This content is both in administrative areas, such as that covered by our course handbooks, and in basic skills training in what might be called 'academic literacies', especially in areas such as basic study skills and library and information skills. It was recognised that, in many cases, this information was delivered at the start of a course when students were not fully cognizant of its importance, and therefore, when students needed a specific skill they often require retraining. As such, there is a clear demand for reusable online content addressing these areas that can be accessed by students at the point of need. However, there is also a clear requirement that information and skills training needs to be discipline specific in order for it to be most valuable. We are working with the library and course teams to identify which topics would be most valuable to develop and how to ensure they are easily customisable to ensure greatest utility and uptake.

Online enrolment and payment

While online enrolment and payment is well established for some of the Department's programmes, such as online courses (<http://onlinecourses.conted.ox.ac.uk/>), other programmes have not been able to take advantage of this service, and at the start of the Cascade project, the majority of the Department's students enrolled and paid for their courses in person, by post or by fax. Expansion of online enrolment and payment services has not been straight forward due to the need to develop extra functionality to manage the specific enrolment requirements of different programme types. Our existing experience indicates that great savings in time can be made by allowing students to enrol and pay for their courses online. In addition, given the global nature of our audience, this functionality also offers a major improvement in the service we can offer our students. As such, this is a priority

for development across as many of our activities as possible.

A survey was undertaken in spring 2009 to review students' attitudes to our existing online enrolment service, and the results were generally very positive. Since then, we have focussed development in four main areas, as outlined below, with priorities set both by ease of implementation and commercial impact:

1. Discounted enrolments (operational since May 2009)
2. Online enrolment for Weekend Schools, including the ability to book catering and accommodation (operational since June 2009)
3. Shopping basket feature to allow students to enrol on and pay for multiple courses at the same time (in development, due to be available from spring 2010)
4. Payment of invoices by instalments (in development, due to be available from summer 2010)

Course proposal system

A clear finding from many of the most successful uses of technology in curriculum delivery in recent years is that those which make a real difference tend to have been designed into the course from the start rather than added as an afterthought. Thus, whilst many of the technology developments being made by the project this year are being piloted within existing programmes, we also wanted to work with new programmes that are currently being designed for launch in autumn 2010.

The proposals for all new programmes currently in the Department's accreditation process have been reviewed and their designs mapped against the sub-themes of Cascade. In addition, the project team has met with many of the course teams to discuss the use of technology and to investigate where generic approaches could be of benefit. The majority of these programmes intended to use technology, with at least some VLE support and online assignment submission, but had not fully considered the implications of their plans in relation to staff resources, student time and associated costs.

As an initial step, the Department has updated its accreditation documentation to include consideration of technology at an earlier stage. We are also considering how the Phoebe Pedagogic Planner tool (<http://www.phoebe.ox.ac.uk/>) might be customised to support the Department's course accreditation process as well as other course design activities which take place in the Department.

The project team is also looking at how we can more widely disseminate examples of existing good practice, such as using online surveys to better elicit requirements for programmes from delivery partners and potential students at the course design stage.

Models

This phase of the project has seen less development of 'models' than anticipated. It was clear from working with stakeholders, and from our previous experience of working in the learning design area, that abstracting interventions too early in the process would not prove helpful either in terms of implementation or communication. While aspects of models have been developed as a side product of initial pilot studies these have not been the focus of concentrated consideration. As such, the workpackages have been updated to reflect greater emphasis on practical implementation in the first instance with the development of models in their various formats taking place later in the project.

Update: The team has spoken to Ulster at the programme meeting about their work and intends to follow this up with reference to models. The team also intends to contact the team at Herts. as we

expect there may be some outputs of interest we can share here also.

Section Three: Outputs and Deliverables

The main outputs of this project have always been expected to be 'models' that enable easy uptake and use of our developments, both by our own staff and others. The vague term 'models' has been useful as it allows us to explore a variety of formats without prejudging the utility of certain approaches. At the moment we are investigating many different possibilities and forms of representation including:

- updated documentation (including forms);
- customisable, reusable content in generic skills and administrative areas;
- training materials (both online and for use face-to-face) for staff and students;
- case studies;
- templates for VLEs for different course types; and
- customised tools and systems such as online assignment submission and Phoebe.

In technical terms, the three main foci for the project are:

1. the development of an extension to the Moodle assignment handling module;
2. extending our online enrolment and payment system; and
3. linking our student and course information system with Moodle to allow easier creation of courses and registration of students. Within this, we are exploring the potential of using XCRI as the main import/export function.

Where applicable, we aim to contribute code from these developments to the mainstream Moodle open source software development site.

In terms of outputs from the reporting period, the project plan, workpackages and project schematics are all available on the project website, and other public facing outputs will be added as the project progresses. More generally, the Cascade team has used the TALL blog to reflect on the project (see: <http://tallblog.conted.ox.ac.uk/index.php/category/cascade/>).

Update: the project team is updating the website and will be sharing ongoing outputs such the communications plan

Section Four: Outcomes and Lessons Learned

As identified in the project proposal, our key challenge remains the ELQ policy. This major change in government funding has forced the need for innovation. While individuals within the Department are often surprisingly open to the idea of innovation they do not believe they have the time to implement it. Identifying ways to implement changes that have obvious utility to our stakeholders, in the face of competing demands on their time, remains our main challenge.

Our baselining activities have consisted mainly of discovering what currently takes up too much time (that could be better spent on some other course-related matters) or is too inconvenient in terms of ease of use, storage space required etc., or that is too expensive to maintain, and whether any of these activities could be easily replaced by a technological solution. We have also been considering how we could improve our offerings to students and where we might engage in valuable new activities.

Key problems/challenges:

- Finding a use for technology that is applicable to as many of our courses as possible as our

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current offerings cover a wide range of presentation formats, academic levels, subject areas and types of student.

- Persuading staff that the initial investment of time to get a new system off the ground will be worth the effort.

The project will address these problems by:

- focusing on common tasks such as assignment handling, online enrolment and payment and generic Moodle course site set-up that can then be customised for different kinds of courses, as required;
- identifying existing and developing new common content, and developing procedures to provide efficient uptake;
- attempting to automate the set up of course sites in Moodle as much as possible; and
- providing relevant training for whatever we implement so that staff can use new systems as quickly and productively as possible.

Impact will be assessed by:

- surveys of students and staff to determine levels of satisfaction, presence of problems (and absence of problems that were previously present);
- studies of time spent on specific tasks carried out in both the original and the new way; and
- analyses of the costs of running new systems compared to the old.

Evidence collected so far includes:

- surveys of targeted student groups who are about to, or who already use some of the technology we intend to implement more widely throughout the Department, highlighting useful as well as problematic features;
- early interviews with representatives of key stakeholder groups;
- feedback from focus groups and questionnaires determining what activities academic and administrative staff feel may be replaced or improved by the use of technology;
- information on existing online enrolment and payment services and the value of these services to the Department;
- a review of new course proposals and feedback from follow-up interviews with course teams; and
- budgets for all programmes, providing records of real development and delivery costs, which can then be analysed in light of specific interventions.

Evidence we are in the process of gathering includes:

- data on staff time taken to support the aspects of courses we are intending to change (for example, time spent on providing information that will be more readily available online); and
- data on the detailed costs of specific processes we are intending to change.

A key lesson in this project has been around communication and managing expectations. With the original proposal being so broad, it was possible to interpret virtually any activity involving technology as potentially being within scope of the project. Now that a clear vision exists for our focussed activities we are developing our plans to better communicate this to our stakeholders.

For any development, we are aware of the need for stakeholder engagement to be a core part of the process. However, early on we realised that we needed to refine some of our initial ideas about how to approach this, especially in relation to the largest stakeholder group - our students. As has been mentioned before, the work done in the Department is exceedingly broad and our students are an extremely heterogeneous, globally dispersed group. They range from people with no experience of using a PC to people developing the latest applications for mobile phones. As such, a broad generic

student survey was problematic. With this in mind, we decided to gather information on our students through a number of methods, including:

- working with what was already there, such as data already collected by course teams or through previous research projects such as Isthmus (<http://isthmus.conted.ox.ac.uk/>); and
- targeting new data collection around key groups and pilot studies which could be used to extrapolate to wider student groups within the Department.

This has proved a valuable approach to enable us to move forward.

Section Five: Communications and Dissemination Activities

At this stage, the team has focussed on ensuring awareness among the stakeholders of the project's existence and what it is trying to achieve. This has been done through open invitations to workshops and meetings with specific individuals. More generally, the project featured in the summer issue of the Department's newsletter (http://www.conted.ox.ac.uk/about_us/news/newsletter/09/OU DCE_newsletter_T09.pdf), which is distributed to all staff, current students and former students who have opted to continue to receive information from the Department by email (c.30,000 individuals). This should have brought the project to the notice of many of the people we will be engaging in the pilot studies. Readers of the newsletter are referred to the project website (<http://cascade.conted.ox.ac.uk/>) for further information so our website updates, as well as our regular project blog posts, enable them to remain informed about the project.

Within the Department, the project is supported by its own Moodle installation which is used as a central repository of all project information and as a development space that all staff involved in the pilots can access. As many Departmental staff are unfamiliar with using Moodle, this allows them a low risk introduction to the platform and its capabilities prior to wider engagement with the VLE for their own course activities.

The first Steering Committee meeting is taking place in early September and will allow the project team to address all the significant groups within the wider University as well as a small number of key external stakeholders.

More generally, the team has engaged in the wider Moodle community in planning and specifying Moodle extensions and throughout the technical developments. Any adaptations to the standard Moodle code will be kept in line with guidelines for contributed code so that any modifications can be made widely available.

We have also ensured that other engagement undertaken by Departmental staff with relevance to the project both feeds into and out from our work. This includes participation in events such as the UK Council for Graduate Education workshop on meeting the needs of part-time research students.

Within Oxford, the project has occurred at a fortuitous time to ensure impact throughout the wider University. The central computing service, OU CS, has recently launched a new VLE and is currently developing training materials, templates and other support material. These have a strong correlation to some of the areas we are looking at in terms of VLE support via Cascade. As a result, we are working with OU CS to ensure each team benefits from the other to maximise our impact across the University. Recently, the University has also undertaken an audit of provision in learning development across the Collegiate University and has created the Fostering Learning Review Group (the Cascade project Principal Investigator, Sean Faughnan, is a member of this group), which aims to establish how Oxford's traditional learning and teaching can be supported and enhanced through

innovative use of IT. These developments suggest that this is an ideal time for our project and its intended outputs.

Update: the team has developed a communications plan and will be developing this going forward to reflect project activities in this area.

Section Six: Evaluation

Although evaluation and baselining are not the same, our evaluation activities have been very much integrated with the baselining activities outlined above - for example through pre- and post-intervention surveys of pilot studies, such as the Global Health summer school. A major issue is that Liz Masterman, our evaluation consultant, is going to have insufficient time available to devote to the project due to other commitments. As a result of this we have undertaken a review of our evaluation and baselining activities and are currently defining our requirements for staff resources in this area.

Focusing both baselining and evaluation activities around specific pilot studies has enabled us to move forward successfully. Our focus for the next six months will be on the immediate pilot studies, namely online assignment submission, VLE support for undergraduate level award-bearing courses in archaeology and VLE support for tutors of the weekly classes programme.

Specific upcoming activities include:

- a survey of weekly class tutors;
- a pre-course survey of students studying undergraduate award-bearing archaeology courses;
- a survey of staff to determine expectations of and attitudes towards online assignment submission and onscreen marking;
- a feedback exercise on the online assignment submission system with expert users;
- testing of training on using the new online assignment submission system;
- evaluation of existing generic content; and
- focus groups around generic content generation.

Update: An evaluation consultant has been identified and the team has specified the role in terms of evaluation and reporting on baselining activities required (taking into account comments on interim report). Work in this area should commence soon.

Section Seven: Issues and Challenges

The main issues the project has faced up to now have been around the delay in recruiting the Research Officer and the time that has been required to define the project scope appropriately. As reported above, both of these issues have now been resolved and the delay incurred has been largely made up.

Rebecca Lingwood, one of the Principal Investigators, will be leaving the Department in October 2009, to head the Institute of Continuing Education at the University of Cambridge. However, as the project seeks to develop outputs relevant for other departments and institutions dealing with similar student intakes and requirements, we hope to take advantage of this connection to invite Rebecca to remain on the Steering Committee and to help us in the dissemination of the results of the project beyond Oxford. The time allocated for her involvement in the project will be reallocated to the other Principal Investigator, Sean Faughnan, so this change should have minimal impact on the project.

A specific challenge has emerged around our development of online assignment handling. It has become apparent that some academics have serious concerns about online assignment submission and in particular onscreen marking. However, both negative and positive attitudes have been highlighted and we now have a much better impression of academics' concerns around this topic than before. It is clear that, beyond training in our specific system, there is a need for support in related areas such as optimising screens for online marking and effective use of the 'Track Changes' and 'Comments' features in Word. We have identified several key champions amongst the Department's academic staff who have much practical experience of online marking and who greatly prefer working in this way. We plan to closely involve these members of staff in project activities related to offering targeting support and training to other academic colleagues with less previous experience in this area.

In a busy University environment, we have found our most effective strategies for engaging stakeholders have been approaching them at times when the aims of the project meet their existing concerns and address acknowledged challenges. While this was challenging early on in the project when our focus was less clearly defined and harder to articulate, this has become easier as the project has progressed, both within the Department and the wider University.

Section Eight: Collaboration and Support

Since the start of the project, we have attended all the programme and cluster meetings organised by JISC. We have also had visits from the programme manager, Lisa Grey, the project coordinator, Marianne Shepherd and Sheila MacNeill from JISC CETIS. In this period we have also had two useful meetings with our critical friend, Peter Chatterton.

In the context of the wider programme, we have run an Elluminate session on the Phoebe Pedagogic Planner (<http://www.phoebe.ox.ac.uk>), which seems to have been well received. More generally, we have continued our interest in the broader area of curriculum design and delivery, learning design, and pedagogical planners both through our participation in the LDSE project (<https://sites.google.com/a/lkl.ac.uk/ldse>) and by attending events such as the Pedagogical Planner Summit recently held at the Open University, which was also attended by several other projects in the curriculum design and delivery programme.

More specifically, we have been in conversation with both Sarah Knight and Helen Beetham about how the support and guidance contained within the Phoebe Pedagogic Planner might be used within the wider programme in the context of the Design Studio.

It would be interesting to hear at least a brief update from other projects beyond our cluster as it is difficult to find the time to identify those it might be useful to engage with more closely, especially across the curriculum delivery and design strands.

So far we have found the interaction with our critical friend extremely useful. It has been particularly valuable to be able to check our assumptions and progress with someone with the knowledge and experience of e-learning that Peter Chatterton brings. Although the projects within our cluster focus on very different implementations of technology within curriculum delivery, we all seem to have similar issues with regard to more generic project management issues such as stakeholder engagement. Our regular CAMEL meetings are very beneficial in getting us to look at these problems from a different perspective and generate new ideas on overcoming difficulties. However, it is worth noting that there is probably a limit to the extent of shared outputs our cluster is likely to produce due to the fundamental differences in our projects.

Section Nine: Financial Statement				
Total Grant	██████████	Duration of project	01 November 2008 to 31 October 2010	
Reporting Period	01 November 2008 to 31 July 2009			
Budget Headings	Total budget allocated	Expenditure this reporting period	Total expenditure to date	Further information
Directly Incurred Staff Costs				
M. Manton , Researcher & Project Manager, G8 43, 0.4 FTE	██████████	██████████	██████████	
E. Masterman , Evaluation Consultant, G8 39, 0.055 FTE	██████████	██████████	██████████	See Note 1
B Lewis , Research Officer, G6 27, 0.6 FTE	██████████	██████████	██████████	See Note 2
Sub-total	██████████	██████████	██████████	
Directly Incurred Non-Staff Costs				
Equipment	██████████	██████████	██████████	See Note 3
Travel and subsistence	██████████	██████████	██████████	See Note 4
Recruitment	██████████	██████████	██████████	See Note 5
Conferences & dissemination	██████████	██████████	██████████	See Note 6
Consultancy (workshop facilitators)	██████████	██████████	██████████	See Note 7
Other (including workshop costs)	██████████	██████████	██████████	See Note 8
Sub-Total	██████████	██████████	██████████	
Directly Allocated Costs				
Staff	██████████	██████████	██████████	
Estates	██████████	██████████	██████████	
Sub-Total	██████████	██████████	██████████	
Indirect Costs				
Indirect costs	██████████	██████████	██████████	
TOTAL COST				
Total project cost	██████████	██████████	██████████	
JISC funding	██████████	██████████	██████████	
Institutional contribution	██████████	██████████	██████████	

Supporting Notes

Spending on the project thus far is under budget; this is largely due to the relatively slow start to project activities and as such will be naturally rectified by activities over the coming months. This

effect has been magnified in the budget above as Directly Allocated Staff, Estates and Indirect costs included in the budget statement are based on data from the University's grant management system and are derived based on calculations driven by Directly Incurred expenditure incurred during the reporting period.

Note 1: Liz Masterman, our evaluation consultant, has not been able to contribute the time hoped to the project. Reported expenditure is for the work she was able to do during the reporting period.

Note 2: Originally, the Research Officer post was intended to be a joint appointment with the LDSE project; however, it became clear that this was not the optimum approach for either project. While the role had been budgeted at a Grade 7, once the job description for the Cascade Research Officer was written, it was graded by the University as a Grade 6 post. The requirement to prepare a new job description and have it graded contributed to the delay in the recruitment to this post, which was filled on 20 April 2009. Due to the delay in recruitment and the change in grade it was decided to increase this post from 0.4 FTE to a 0.6 FTE so that by the end of the project the budget will have been spent as forecast.

Note 3: Originally the PC for the Research Officer post holder was budgeted as part of the LDSE project; when this was no longer a joint appointment, the project needed to purchase a PC for the new Cascade Research Officer. While this was an unanticipated expense, the cost has been compensated for by more than equivalent savings in recruitment.

Note 4: While the project team has been represented at all JISC programme meetings, due to the late recruitment of the Research Officer, for much of this reporting period fewer people have attended these meetings than was budgeted for. In addition, many of the meetings have been held relatively close to Oxford meaning that costs have been lower than budgeted for per trip.

Note 5: Due to the Research Officer post being advertised only on the University's website and the jobs.ac.uk website no direct recruitment costs were incurred.

Note 6: As the project is in its early stages, serious work on dissemination has not yet commenced. Attendance at conferences is likely to take place towards the end of the project when there are genuine findings to report. The project team is planning to participate in ALT-C 2010.

Note 7: The main workshops for the project have not yet taken place. These are likely to be held during the next phase of the project.

Note 8: To date, two workshops have been held to solicit stakeholder requirements. As outlined in Note 7 above, the main workshops for the project are planned for the next phase of the project.