

JISC DEVELOPMENT PROGRAMMES

Project Document Cover Sheet

PROJECT PLAN

Project

Project Acronym	EPICS	Project ID	07/04
Project Title	North east regional collaboration around e-portfolio progression pathways with illustrative studies		
Start Date	31 st January 2005	End Date	31 st March 2006
Lead Institution	Newcastle University		
Project Director	Paul Hopkins		
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Partner Institutions	Northumbria University, University of Durham, University of Sunderland, University of Teesside, City of Sunderland College, Stockton Riverside College		
Project Web URL	http://www.epics.ac.uk/		
Programme Name (and number)	<i>JISC 07/04 Distributed eLearning Programme</i>		
Programme Manager	Sarah Davies		

Document

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Document History

Version	Date	Comments
Draft	18/02/2005	For discussion and Guidance only
Draft 0.2	24/02/2005	Update of responsibilities and stakeholder from comments received
Draft 0.3	24/03/2005	Update of work packages; standards, evaluation plan and budget allocation.
Draft 0.4	29/03/2005	Update of work packages; standards, evaluation plan and budget allocation.
1.0	19/04/2005	Minor updates and corrections; Agreement of the plan

EPICS Project Plan

Overview of Project

1. Background

This collaboration of representatives of North East (NE) educational sectors (within and between FE/HE) proposes a scalable and sustainable regional pilot project building on local excellent practice in personal development planning (PDP) and e portfolios to support learners at all levels of post-16 education. Enhancing the learning experience by supporting the individual needs of each learner is at the heart of this development, along with permanently embedding collaboration in regional activity.

The project will use a methodology designed to develop, test and evaluate a practical approach, building on existing tools, to implement a region-wide infrastructure for the easy transfer of individual progress file, ePortfolio and PDP information across a range of agencies and institutions.

The sharing and extending the use of robust tools and services across regional educational sectors maximises investment and local ownership, with commitment to succeed. Crucially, the use and integration of Shibboleth and core middleware technologies to authorise and authenticate access to content across participating institutions is a major objective of the project.

There is still considerable effort required in order to enable institutions to efficiently and effectively roll out good practice across subject areas. Additionally, there are few standards or legal, political and social structures, to support the transition from school to FE and HE, and into work and CPD.

The partners, who have a history of working closely together and, following extensive dialogue, have chosen to prioritise learner needs as a key area of work, acknowledging other collaborative work, and complementary proposals in response to this project

2. Aims and Objectives

The aim is to collaborate with representative institutions of North East (NE) educational sectors (within and between FE/HE), to extend the regional partnership through active engagement and dissemination of illustrative case studies, and to learn from parallel activities elsewhere.

The project objectives are identified to:

- Establish a regional collaboration pilot project pledged to deliver a critical level of uptake of connected services
- Identify the conditions necessary to create a framework within which a single e portfolio PDP, directly linked to the individual learner, can be followed through its full lifecycle from the final secondary school years to A level and FE, through foundation courses and degrees to graduating from HE and on into the workplace, whilst providing a seamless experience to the individual learner
- Develop a suitable technical framework to deliver the transfer of learner e portfolio information (which may be different in each institution) between a range of educational institutions, and web based interfaces to enable access from learners' homes, educational establishments and the workplace
- Implement an agreed base-level technical schema to test the portability of learner e portfolios.
- Examine the regional, legal, political and cultural issues which need to be addressed in order to offer a full progression pathway
- Evaluate the integrated use of e portfolio tools to support widening participation and lifelong learning, by developing 5 model case studies to illustrate how local, regional and national systems will work together to provide coherent access across educational institutions to learner portfolio information
- Utilise Shibboleth technologies to control authorisation and authentication to learner record information, and investigate the opportunities for attribute data (from ePortfolios) to enhance Shibboleth flexibility.
- Disseminate the practical outputs of the project to other regional partnerships and the JISC via the website, documentation (including a handbook and case studies), and events

3. Overall Approach

The project will use a four stage strategy in which the work packages with the associated tasks and resources / timescale allocation will be defined in detail as the project progresses. This will provide the project team with sufficient time to learn as we go and the project team will be able to build on the skills and experiences being learnt throughout the project lifecycle.

All project documentation including the work packages will be validated by the project partners and refined in the light of their experiences. Each work package and stage will be quality assured by members of the Higher Education Academy subject centre for Medicine, Dentistry and Veterinary Medicine ('the Academy' formerly LTSN-01)¹ and deemed 'fit for purpose'.

All risks and issues encountered will be resolved before progressing to the next dependency work package and or stage. During the lifecycle of the project there will be a continuous process of learning from the process and the lessons learned will be documented and published using the objectives and deliverables identified in the communications strategy.

Additional Funding Award

Using the additional funding will allow the project to investigate and resolve the issues to allow the development and implementation with real life examples of student records being electronically transferred between partner sites. Controlled access, authentication and authorisation will be maintained using shibboleth. In addition to the legal issues which need to be addressed, the project needs to establish the secure authentication procedures given that we will be access real live student data.

First stage:

Setting up project controls and reviewing current status. The stage will incorporate the following work packages: (the detailed WP are documented in appendix B)

- WP1 Project Start-up and Controls
 - Establish terms of reference for the collaboration of involved partners
 - Allocation of project resources, staffing and budgetary controls
 - The setup of the Advisory Board: To include member representatives from: The senior user, the executive and the major stakeholders
 - Acceptance of the project plan
 - Detailed project planning
 - Project Reporting; to include highlights/ progress reports; issues and risks and dissemination news

- WP2 Communication Strategy
 - Establish a communications strategy based on email, meetings (including advisory), reporting, stakeholder briefings, website updates and regular updates of progress
 - Establish email lists; Web Site; Project Management system
 - Reporting and communication structures, timetable for meetings

Second stage:

This will consist of defining both the design and technical elements of the project. This stage will incorporate the following work packages: (the detailed WP are documented in appendix B).

- WP3 Review and mapping exercise to identify current practice at partner institutions (e.g. progress files, recording basic skills); identify staff with PDP responsibility at each institution; arrange user group
 - Identify review and mapping areas to be investigated wrt Progress Files, PDP, recording basic skills, and use of ePortfolios

¹ The Academy subject centre is an independent agency, responsible directly to the constituencies through the Academy and the UK Higher Education Funding Councils, and the team who developed the proposal

Identify existing technical, data flow and legal baseline, and document requirements
Identify barriers
Draft hypothetical and real use cases for testing

- WP4 Develop and establish use cases for a small selection of current students in FE and HE institutions.
Develop and circulate sample forms for collecting hypothetical use cases (for testing)
Develop, conduct and document structured interviews and questionnaires with partner stakeholders (sample), in order to identify current practice in WP3 above
Collate/document hypothetical use cases
Identify and document potential barriers to collaboration
- WP5 Establishing a Regional Governance Framework
- WP6 Implement/establish ePortfolio servers
Assess student data sources (primarily management information systems)
Clone copies of ePortfolio system as necessary
Populate ePortfolio servers with institutional data
Customise ePortfolio servers to institutional requirements

Third stage:

This will consist of building and implementing the design and technical elements of the project. This stage will incorporate the following work packages: (the detailed WP are documented in appendix B).

- WP7 Implement a technology interpretation/transfer negotiation layer
ioNodes familiarisation, setup of initial server
Implement technology interpretation/transfer negotiation layer for reference (lead site) ePortfolio
Implement technology interpretation/transfer negotiation layer for additional site
Test bi-directional transfer of data
Setup additional technology interpretation/transfer negotiation layer for other partner sites
Test document transfer of data with student examples
Implement and document the transfer of data with student examples
- WP8 Install Shibboleth infrastructure (WebISO +origin) at partner sites
Establish a technical contact within each partner institution
Assess feasibility of infrastructure installation at each site via questionnaire covering facilities, expertise, any existing webiso, password store; open ports establish a set of attributes to be used for authorisation
If necessary, investigate feasibility of centrally hosted infrastructure
Identify authorisation attribute source at each partner institution
Purchase and install WebISO and origin servers at each site
If necessary and feasible, install centrally hosted infrastructure
- WP9 Shibboleth authorised inter-institutional access to ePortfolios
Establish managerial contact at each partner site
Each partner site joins SDSS federation
Adapt existing ePortfolio products as Shibboleth targets
Identify and agree set of attributes to be used to authorise access to ePortfolios
- WP10 Create a master set of suitable records for test data exchange between institutions, containing agreed real or fictional student 'use case' data for each partner. This will be based on the forms developed in WP3 and WP7.
Test data exchange within sectors:
FE – FE College; HE – HE institution;
Test data exchange across sectors:
FE College – HE institution
Review the learner experience through 'talk aloud' protocols, reflection.

The Forth and final stage:

To document, publish the findings, disseminate and share any development with national and regional institutions (the detailed WP are documented in appendix B).

WP11 Develop detailed dissemination plan (support from the Academy Subject Centre (LTSN-01 team)) and the development of an evaluation strategy (in conjunction with JISC Regional Support Centres) This will include (but not limited to):

- Investigate dissemination interfaces
- Produce Dissemination Strategy and Plan
- Review project documentation
- Dissemination event (Regional)
- Dissemination event (National)
- workshops with the partner sites (embedding) and wider audiences understanding/awareness within and outside the region;
- focus groups; documentation which will be presented in a 'handbook' of good practice, solutions, and case studies (based on the use cases outlined above).

Critical success factors include:

- The proactive collaboration of involved partners
- Implementation of a communications strategy
- ePortfolio standards and transfer infrastructure involving all participating partners
- Installation and commissioning of identified hardware
- Successful configuration and implementation of Shibboleth
- Sustainable transfer of student portfolio data between participating institutions
- The publishing of project documentation, finding and recommendations.
- Scope and boundaries of the work, including any issues that will not be covered.

May be expanded as work progresses

4. Project Outputs

Deliverable	Outline Description
Use cases and scenarios	These will be developed as hypothetical and real (anonymised) datasets designed to test the technical dataflow and political frameworks through which learner information must pass and which check that a representative set of progression pathways have been analysed
Regional collaboration strategy	Collaboration undertaken and established as part of this project (including dissemination activities and website) will be documented in interim and annual reports, and reported to the Advisory Board
Learner case studies Implementation case studies	A series of at least five detailed hypothetical case studies will be developed illustrating a range of rich learner scenarios which illustrates the complex educational progression pathways available to an individual in their personal development. A set of five case studies illustrating a range of learner scenarios which demonstrate the provision of various aspects of distributed eLearning in the NE Each site will document the approaches taken, lessons learned and experiences of the project
Learning enhancement and student outcomes	Develop and establish use cases for learning enhancement and student outcomes for a small selection of current students in FE and HE institutions
Portfolio transfer infrastructure	A critical uptake of PDP tools in the region, sharing good practice and direct exchange in order to benefit learners. The use of Shibboleth to authenticate and authorise access to resources in a regional context
Individual reports	Individual reports will be developed during each WP which will be uploaded to the website separately, and (finally) as part of the handbook outlined below
Documentation Handbook	A range of documentation detailing and exploration of the implications, benefits and opportunities of distributed portfolios together with a publicly available set use cases, scenarios and case studies, and technical specifications will be made available

5. Project Outcomes

List the outcomes you envisage, including their impact on the teaching, learning, or research communities, and what change they will stimulate or enable.

To combine various and developing technologies that will support a regional collaboration of North East higher and further education institutions to implement learning outcomes based assessment and to disseminate both the models and the results to those who will take part in this development.

Collaboration of the NE higher and further education institutions will develop new working practices, procedures and processes to implement the transference and communication of learning outcomes assessment as part of an ongoing effort to improve the quality of the learning experience of students.

The emphasis of the project outcomes is to investigate and where required develop technologies and best working practice which supports the efforts of the participating institutions across various aspects of distributed eLearning in the NE.

To establish the update of PDP tools consistent with the principles of best practices for active and generative learning and the WSU commitment to undergraduate research.

The utilisation of agreed an template will facilitate the generation and dissemination of reports that fulfil administrative and accreditation requirements and of showcases to communicate the complexity and richness of our values to our internal and external constituents.

6. Stakeholder Analysis

Stakeholder Groups	Interest / stake	AB	Importance
Host institution and lead site FMS (Tony McDonald) (Newcastle)	Contributor to the bid, responsible for delivering project – lead site. FMS and ISS need to work effectively	*	High
Host institution ISS (Janet Wheeler) (Newcastle)	Contributor to the bid. Responsible for delivering Shibboleth. FMS and ISS need to work effectively	*	High
Academy subject centre (Megan Quentin-Baxter) (Suzanne Hardy)	Contributors to the bid and assessing the Quality Assurance of the project	*	High
Partner institutions City of Sunderland College Durham University Northumbria University Stockton Riverside College Sunderland University Teesside University	Collaborating and delivering one or more of the work packages	* * * * * *	High
Paul Hopkins (Ncl and NorMAN)	PI – support is essential	*	High
End users such as students	Users of the service	*	High
JISC	Main User of the project results	*	High
NorMAN regional network	Important for regional support and dissemination	*	Medium
Partner institutions senior management and other stakeholders including	Important to support implementation of the project		Medium
Other HE institutions	Key to effective dissemination		Low
JISC Regional Support Centre Northern			Medium

Stakeholder Analysis (Con't)

Stakeholder - Advisory Board	Interest / stake	AB	Importance
Paul Hopkins PI University of Newcastle	To chair the AB – representing ISS and FMS; NorMAN	Yes	High
Sarah Davies JISC	JISC Programme Manager	Yes	High
Prof Ella Ritchie University of Newcastle	Invite to nominate a representative to the AB (in addition to Paul Hopkins PI)	Yes	High
Prof Alan Bilsborough University of Durham	Invite to nominate a representative to the AB	Yes	High
Prof JR Bradshaw University of Sunderland	Invite to nominate a representative to the AB	Yes	High
Prof KL Oglesby University of Teesside	Invite to nominate a representative to the AB	Yes	High
Prof Bob Cryan Northumbria University	Invite to nominate a representative to the AB	Yes	High
Dr W King City of Sunderland College	Invite to nominate a representative to the AB	Yes	High
Dr Sujindar S Sangha Stockton Riverside College	Invite to nominate a representative to the AB	Yes	High
Alan Sanderson (on behalf of Helen Pickering) Unis4NE	Invite to nominate a representative to the AB	Yes	High
Mike Adams	Employers stakeholder. Invite to nominate a representative to the AB	Yes	High
Gareth Davies JISC RSC Northern	Invite to nominate a representative to the AB	Yes	High

Stakeholder Individuals	Interest / stake	PT	Importance
Mr Lawrence Taylor Northumbria University	Managing the EPICS project	Yes	High
Mr Dave Webster University of Sunderland and JISC RSC Northern	Contacts with FE partners particularly through the RSC. Member of NorMAN	Yes	High
Mr Gary Davison University of Newcastle	Named on the project proposal – some time allocated to this project	Yes	High
Ms Janet Wheeler University of Newcastle	Manages the IAMSECT Shibboleth project	Yes	High
Mr Jamie Thompson Northumbria University	PDP rollout at UNN leading a PDP pilot at Northumbria	Yes	High
Mr Simon Cotterill University of Newcastle	FDTL4 (and other projects); PDP in medicine and health	Yes	High
Ms Sue Gill University of Newcastle	Implementing PDP for the University (not medicine)	Yes	High
Mr Matthew Duncanson-Hunter University of Sunderland	Variety of support and development roles at Sunderland; looking after links with FE colleges in the region	Yes	High
Mr Bruce Ingraham University of Teesside	Responsible for eLearning across the curriculum	Yes	High
Mr Rick Smith	Stockton Riverside College	Yes	High
Mr Rob Wilson University of Newcastle	Collaborating and delivering one or more of the work packages	Yes	High
Dr Megan Quentin-Baxter Academy subject centre	Quality Assurance on the project & Involved in supporting a number of projects in this round around the UK	Yes	High
Dr Tony McDonald University of Newcastle	Quality Assurance on the project & Project Manager on FDTL4; Joint Project Manager of ePET	Yes	High

Stakeholder Analysis (Con't)

Ms Suzanne Hardy Academy subject centre	Quality Assurance on the project & Coordinated the writing of the bid.	Yes	High
Ms Susan Hakim RSC	HE Liaison	Yes	High
Dr Malcolm Murray University of Durham	Learning Technologies	Yes	High
Mr Paul Drummond University of Newcastle			
John Snowdon University of Newcastle	V. Technical		
Paul Hollands University of Newcastle	Information specialist, libraries background, dissemination		
Ms Kate Boardman	University of Durham		
Ms Beatrice Ollerenshaw University of Durham	Pedagogy		
Mr Bob White University of Teesside	ePortfolios		
Mr Dean O'Brien Northumbria University			
Dr Oisin MacNamara Northumbria University			
Ms Doreen Shannon Northumbria University			
Julie CIA Training			
Mr Henry McLaughlin COSC			
Mrs Janice Coulson University of Newcastle	Clerical support to PI		
Ms Sue Bruce University of Newcastle	Clerical support to the Academy subject centre		
Mr Mark Burrell Northumbria University	e-Learning		Medium
Ms Roz Cooper Northumbria University	Project Management interest		Low

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (PxS)	Action to Prevent/Manage Risk
Organisational Lack of clarity in the work packages and who is responsible for what	3	5	15	A commitment must be agreed by partners to deliver the WP on time and within budget
Time – insufficient time to complete the work Already Late (11 weeks)	3	4	12	Management required to ensure work packages are delivered on time
Staffing	3	4	12	Project teams have the required expertise; there is a wide variety of people involved, institutional commitment of project staff will be a risk that has to be mitigated.
Lack of commitment	3	4	12	Partners to be motivated to succeed, project plan communicated to participants
Insufficient benefits to partners Commonality?	3	3	9	Is this work closely aligned to strategic requirements?
Shibboleth not used by partners, incompatible versions, Shibboleth failure	3	3	9	Close watch on international developments, advice from JISC
Scope creep – needs / focus / targets, change management	3	3	9	Strong management to ensure scope remains within plan, adjustment within reason
External suppliers	2	4	8	Some parts of the project dependent on commercial and open source software e.g. MS backend, Blackboard, WebCT, shibboleth risk being monitored by partners
Raised expectations – unrealistic	4	2	8	Project and Communication Plan is very clear in order to avoid any misunderstanding
Legal	2	4	8	Legal issues anticipated, we need to address the risk
Communication/dissemination ineffective	2	4	8	Adherence to the communication plan is essential throughout the lifecycle of project
Technical	2	3	6	Project will use existing technologies and have skilled experienced staff to deliver and support the services
Insufficient planning – unanticipated activities needed	1	4	5	Strong Project Management is being used; Joint planning among team and JISC programme manager is a member of the Advisory Board, the will mitigate the risk
Cost – over budget	2	2	4	Budget Allocation is fixed, additional input from partners may be possible. Project control will minimise this risk
Quality – insufficient quality standards achieved	2	2	2	Quality will be monitored via evaluation, need external validation?

8. Standards

The project will be conducted using freely available tools wherever possible, and any outputs made available under the auspices of creative commons licensing (CCL) (<http://creativecommons.org/>). Under CCL all resources will be fully acknowledged in project documentation and as comments in any distributed scripts or programs. Third party interests will be respected by notifying them of the work of the project and requesting their permission to reproduce, if necessary and where appropriate. 'Document status' guidance will indicate the reproduction rights of all documents, and any permission granted will be indicated in an appendix to the project documentation.

The project will adhere to relevant standards and specifications as laid out at http://www.jisc.ac.uk/proj_manguide16.html

The standards document referenced at http://www.jisc.ac.uk/projman_standards.html, points to http://www.jisc.ac.uk/uploaded_documents/ACF127.pdf, which is a draft document from February 2001. However, some specifications and standards from the document are relevant to this project:

ePortfolios

Document formats: - the web site will conform to the XHTML DTD and CSS will be used to control the appearance of the site. The use of FLASH and other plugin based technologies will be limited to those that we expect the vast majority of browsers to be able to support.

Any news feeds created will use an appropriate version of RSS and/or ATOM (created since February 2001) specifications.

Any scripts the user is required to execute will be in ECMAScript, and server-side scripting will be in Zope, CGI or PHP.

UK-LeaP British Standard BS8788 UK Lifelong Learning Profile (<http://ecommittees.bsi-global.com/bsi/controller?livelinkDataID=835344/>). IMS-LIP (<http://www.imsglobal.org/>)

Accessibility: The web site will conform to relevant guidelines on accessibility, such as W3C (at least WAI Level A).

Metadata: UK Lom Core (<http://www.cetis.ac.uk/profiles/uklomcore>) an application profile of the IEEE Learning Object Metadata Standard <http://metadata.cetis.ac.uk/specs/#LOM>

Content Packaging: IMS Content Packaging (<http://www.imsglobal.org/content/packaging/index.cfm>) will be used for data transfer between systems. e.g. a content package containing pdp and lip info is used to move that info from webct to blackboard etc.

Shibboleth

LDAP: the recommendation of v3 of LDAP is noted and the project will conform to this requirement.

Authentication: The project will use Athens access management where necessary to compare and contrast with the core requirement of the project, which is to create Shibboleth enabled origins and targets,

It is the intention to utilise version 1.2 of Shibboleth for the lifetime of the project; this decision may be subject to re-examination if any later version introduces benefits which would outweigh the consequences of upgrading.

The version of Pubcookie utilised will be that in production service at Newcastle (currently 3.1)

9. Technical Development

During the lifecycle of the project a technical framework will be developed and revised by the learning experiences of the partners, which will deliver the project objectives (which may be different as defined by the partner's institution).

10. Intellectual Property Rights

The Intellectual property rights developed within the project will be governed, in accordance with:
 UK law
 the NorMAN consortium agreement

The project team and the project manager will take responsibility: to ensure that we all respect the intellectual property rights of others, and to ensure that we properly manage the project's intellectual property rights.

In order to comply with the law, all team members will take personal responsibility of the work they undertake and will obtain written permission for any intellectual property they incorporate in their work.

All outputs of the project will be provided for free to the education sector (within legal limitations e.g. data protection)

The project will ensure dissemination at several levels: awareness; understanding and embedding. The Shibboleth origins and targets outcomes will be disseminated alongside IAMSECT

Project Resources

11. Project Partners

Partners	Roles	Main Contact
Host institution and lead site ISS and FMS including ePET, IAMSECT and other relevant developments (Newcastle)	Responsible for delivering project – lead site.	Paul Hopkins Tony McDonald
City of Sunderland College Durham University Northumbria University Stockton Riverside College Sunderland University Teesside University One extra FE college	Collaborating and delivering one or more of the work packages	Merv Stapleton Mr Malcolm Murray Mr Jamie Thompson Mr Rick Smith Mr Dave Webster Mr Bruce Ingraham
Academy subject centre	Quality Assurance on the project & Coordinated the writing of the bid; Responsible for project Dissemination.	Megan Quentin-Baxter
SHELL Plymouth	the design, development and implementation of the ioNode infrastructure, the open source and open standard technologies which underpin the transfer infrastructure	Dave Croot
Norman, regional network		Mr Trevor Cornwell
JISC Regional Support Centre Northern	Involved will help to ensure that FE colleges can be involved	Mr Dave Webster

Consortium legal framework is being addresses and will be documented here when agreed.

12. Project Management

The project will be independently managed by a PRINCE2 project manager. Using the most appropriate elements from PRINCE2 standard methodology and the project requirements identified in the terms and conditions supplied by JISC, provides the project with the tools and the ability to manage the project and project risks more effectively, and specifically, encourages the formal recognition of roles and responsibilities within the project which will focus the Project Team members on what the project needs to deliver, why, when and for whom.

By close collaboration with all of the partners, the Project Team will develop detailed work package specifications. A work breakdown structure will be developed to provide the necessary project controls allowing the development of a detailed project plan. The project plan will provide the day to day control with an agreed process of change management to ensure a smooth development, implementation and deployment.

Given the complexity of the institutes and organisations involved, the communication plan and the change management process will require close monitoring and attention to ensure the necessary commitment from all involved is managed.

The project has 4 stages; these stages will be planned to coincide with the most appropriate timings of the partners working calendar and to ensure that there is sufficient resource and time to complete the tasks. The project stages will be planned accordingly with the assumption that there will be a major review during the implementation stage, and re-planning exercise completed where necessary.

The Advisory Board comprising of the major stakeholder groups including JISC and chaired by the Project Director Paul Hopkins. This group will meet a minimum of three times during the life of the project (to authorise progression and to resolve any major issues). At any time the group can be asked to meet to resolve any major issues that can not be resolved by the Project Manager or the Programme Manager.

A Project Team, comprising senior staff from the respective institutions, will be established to oversee the day to day development and implementation of the project. As this team comprises of seven institutions, the communications plan will identify the methods of communication; this will include using email, JISC mail, the EPICS web Site. Meetings will be arranged between 4 weekly intervals, or when deemed necessary by any member of the consortium.

The project manager is responsible for managing the project with additional project management support from the lead site and piloting a web based project management tool. Clerical support is being provided by the lead site, working on behalf of the seven partner sites.

The Project Officers and Consultants will be appointed to carry out the implementation, researching, documenting activities, coordination, and sharing good practice between the partner sites. The Project Officers, Senior Staff and Clerical Officer will be located as appropriate at the lead and partner sites. Office space has been allocated at Newcastle, Teesside, Stockton Riverside and Sunderland/City of Sunderland College who are hosting Project Officer's on behalf of the other sites.

Additional expertise from senior staff at the collaborating sites will be sourced to deliver additional or currently unidentified work packages or tasks, to promote engagement between the project team, and to buy in external consultancy to assist with and ratify the ioNodes and legal/governance work (e.g. from SHELL and JISC LIS).

13. Programme Support

The programme manager is also a member of the Advisory Board. As such she will be involved in the high level guidance process. In addition, the Programme Manager has offered to assist the project by identify any overlap with other projects and activities which could be of assistance to the project.

14. Budget

See Appendix A

Detailed Project Planning

15. Workpackages

See Appendix B

16. Evaluation Plan

The evaluation is integral to engendering ownership amongst the partners, to gather formative and summative feedback on the project as it develops and inform all via the dissemination strategy.

The proposed work should help to maximise the pedagogic advantages of devolving the responsibility for learning to subject specialists, and the quality assurance, administrative and economic advantages of implementing institution or region-wide solutions.

Establishing widespread use of e-portfolios by integrating existing services in a way that promotes organisational and technological convergence is complex and a number of questions arise. These questions are generic to education as well as specific to this project.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
WP 4 & 6	System Functionality	How do we integrate the leading technologies	PT – review & document	Pilot based on variety of technologies working between all partner sites
WP 3 & 4	System Specification / Standards	How do we best configure and share learner attribute data	PT – review & document	Documented report of attributes, configurations & methodologies
WP 5	Legal	What can we learn and advise about the legal requirements under data protection, databases and copyright	Procure legal advice; document legal issues	Tested advice available on website
Project Lifecycle	User Participation	How can Computer Services, Library, Learning Support Centres, Faculties and Schools in multiple institutions work together in developing, testing and achieving integration in a way that works for the student	Engagement of Advisory Board	AB representation of a range of groups; student evaluation outcomes
WP 10 & 11	System Appropriacy	Are the user interfaces intuitive and how seamless is the service	Stakeholder evaluation; observations (staff, students)	Time taken to learn the procedure for variety of stakeholders/interfaces
WP 11	System Review	How does the innovation compare with the existing 'status quo'	Baseline assessment pre of post-use - questionnaires	Comparative evaluation research report
WP 11	Sustainability	Is it possible to accelerate institutional cultural change through the implementation of region-wide e-portfolios	Qualitative interviews of senior management	Summary report

PT = Project Team

Feedback from stakeholders (partners, learners, staff, consultants, etc.) will be sought as part of the documentation of this project. The project team will prepare and administer, with the advice of the Higher Education Academy, stakeholder questionnaires and structured interviews before and after the deployment of e-portfolios in order to investigate the questions above. Server logs will be analysed to discover patterns of use. Focus groups with service users (students, staff, etc.) will be used where possible to gather qualitative information about usability of the service. Results will be included in the documentation produced.

17. Quality Assurance Plan

A quality assurance plan will be developed during the detailed specification of the work packages. This will include the partner’s responsibility to develop the work package as ‘fit for purpose’. Where there is the inclusion of automation tools for functional testing of any computer related systems, a detailed testing plan will be developed by those responsible for producing the deliverable.

The roles and responsibilities for the partners will be clearly defined and the following reporting method will be used.

A list of tasks with the roles and responsibilities of each person responsible will be recorded along with a description of that task. Where one or more participants are responsible for completing the task, each task will have ONE participant who is accountable for the quality assurance.

An external Quality assurance team (members from the Academy subject centre) will oversee the quality assurance plan.

Timing	Compliance With	QA Method(s)	Evidence of Compliance
January to April	A communications policy that markets the Project to its customers.	Creation of Project Management documents and plans	Publication and sign off of the plan
Project Lifecycle	WP Fit for purpose	Internal and or External quality verification	Customer and project sign off
Stage 2 and 3	Best practice for processes	Research / Verification	Publication and sign off of the plan
Stage 2 and 3	Adherence to specifications	Creation of support and operational procedures documents	IMS specifications, etc., compliance
Stage 2 and 3	Adherence to standards		IMS specifications, etc., compliance
Project Lifecycle	Accessibility legislation		Bobby compliance, etc. (validators)
Stage 4 and 4	Agreed project support hand over documentation be completed and signed off by those responsible	Adherence to project controls	Dissemination Documentation

Acceptance Criteria and how these will be assessed

- Customers: A selected number of customers will participate in the acceptance and sign off.
- Quality Assurance team is satisfied that all quality expectations have been met, or have accepted off-specifications where appropriate
- Advisory Board is satisfied that all quality expectations have been met, or have accepted off-specifications where appropriate
- Advisory Board and the Quality Assurance process approve any service handover and decommissioning processes
- Advisory Board authorise and confirm permission to proceed to the next stage, project closure, and Project Closure Notification

18. Dissemination Plan

The Academy subject centre and will be assisting the project with national dissemination activities for the project.

Additional support is available through JISC Regional Support Centres, particularly RSC Northern.

Timing	Dissemination Activity	Audience	Purpose	Key Message
31/1/2005	EPICS Web site	Education & Health Sector; Industry and commerce	Awareness, Education, Research and Publicity	Forum to communicate and discuss issues
31/1/2005	JISC Mail	Education & Health Sector; Industry and commerce	Communication	Forum to communicate and discuss issues Current project activities
31/1/2005	Email	The stakeholders, Customers and the project team	Communication	Forum to communicate
31/1/2005	Project Management System	Project Team and Advisory Board	Planning	Current project WP and Tasks activities
Oct 2005	Extend the regional partnership through active engagement and dissemination of illustrative case studies	Education & Health Sector; Industry and commerce	Participation	
Nov 2005	Sharing and extending the use of robust tools and services across regional educational sectors	Regional Education & Health Sector	Share findings	
2005/2006	Will include a region-wide agreed technical exchange framework and a handbook of good practice with illustrative case studies, which will be widely disseminated	Regional Education & Health Sector	Draw together experience and feed into regional strategic thinking	
2006	National Dissemination to share the findings and deliverable outcomes.	Education & Health Sector; Industry and commerce	Dissemination to share the findings and deliverable outcomes	Comparative value of ePortfolios in the educational process

19. Exit/Sustainability Plan

At the end of the project the partners will have used the JISC pump-priming to implement change and the seamless environment necessary to support regional e-portfolio progression pathways.

New working practices, procedures and processes will be embedded. Permanently changed working practice will ensure that long term sustainability is maintained at each partner site.

Servers from this project will be maintained for a minimum of two years after the end date and the infrastructure related to the project will be left in place and maintained by the partners who are committed to regional partnerships as exemplified by the NorMAN network and Unis4NE.

The partners are convinced that a regional pilot as described here can be established within the budget outlined due to the existing infrastructure and commitment. Therefore this proposal offers **excellent value for money**.

To be developed further, after the project team meeting, and during the lifecycle of the project.

At the end of the project the following actions will be implemented:

Project Outputs	Action for Take-up & Embedding	Action for Exit
Collaboration	Inclusion during project lifetime	Maintenance of collaborative agreement; further collaborative work planned (e.g. regional CETLs)
Website, email lists, etc.	Regular upkeep (information); high quality	Review quality; ensure support for maintenance; commitment to maintain for at least 2 years
Technical know-how	Fully documented during project	Dissemination of handbook; events

The following outputs have the potential to continue after the completion of the project:

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
ePortfolios	Progress files and PDP required by 2006; access to free software	Building on existing experience in HEI/FEIs; engagement of key stakeholders; pilot with key groups; review, expand and embed	Ensure exemplars/ scenarios working by end of project; accommodate multiple existing systems; flexibility required
Shibboleth	Considerable investment and commitment	Ensure uptake by partners during life of project	Awareness and uptake of Shib. technology; exemplars; critical mass
Higher quality student learning experience	Better pastoral and academic support; student demand (fees)	Regular review as part of institutional QA; baseline evaluation benchmark;	Cultural and societal barriers; perception; change management

Appendix B. Work Packages (to be agreed on the 19th April 2005)

WORKPACKAGES	Mth	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1: Project Management Controls																
2: Communication Strategy																
3: Review and mapping exercise																
4: Develop and establish use cases																
5: Establish the regional governance																
6: Implement/establish ePortfolio servers																
7: Implement a technology interpretation/transfer negotiation layer																
8: Install Shibboleth origin servers																
9: Shibboleth component - infrastructure																
10: Test and document transfer of data with real student examples																
11: Detailed dissemination and evaluation strategy																

Project start date: 31-01-2005

Project completion date: 31-03-2006

Duration: [15] months

Work package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<p>WORKPACKAGE 1: Project Management Controls</p> <p><u>Objective:</u> To setup the project controls, e.g. Advisory Board, Management Team, Project Team, reporting & communications, budget controls, collaboration framework, detailed planning</p>	31/1/2005	31/3/2006			Project Manager
1. Project Start-up and Controls	02/02/2005	19/04/2005	Communications; Planning documentation, Highlight Reports		Project Manager
2. Establish terms of reference for the collaboration of involved partners	24/02/2005	19/04/2005			Project Team
3. Allocation of project resources, staffing and budgetary controls	19/04/2005	19/04/2005	Agreed budget; Monthly Budget Reports		Project Team
4. The setup of the Advisory Board: To include member representatives from: The senior user, the executive and the major stakeholders	25/03/2005	30/04/2005	Advisory Board; Risk Assessment Report Issue Report		Project Team
5. Acceptance of the Project Plan	31/03/2005	31/03/2005	Project Plan	Yes	JISC (Sarah Davies)
6. Detailed project planning	19/04/2005	31/03/2006	Work Packages Schedules		Project Manager
7. Project Reporting	31/1/2005	31/3/2006	Highlight/Progress; issue and Risk Reports;		Project Team Project Manager

Duration: [15] months

Work package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<p>WORKPACKAGE 2: Communications Strategy</p> <p><u>Objective:</u> To develop and agreed methods of communicating with Partners; Stakeholders and interested groups</p>	31/1/2005	31/3/2006			
8. Develop communication strategy	31/1/2005	19/4/2005	Documented communication strategy as part of the plan	Yes	Project Manager
9. Establish email mailing lists	31/1/2005	19/4/2005	Communications (Emails)		Project Team Project Manager
10. Establish web site	31/1/2005	19/4/2005	Dissemination		Project support Project Manager
11. Establish Project Management system	31/1/2005	19/4/2005	Planning and Scheduling		Project support Project Manager
12. Establish the Advisory Board; and scheduled meetings	31/1/2005	31/03/2006	Discussion Papers; Minutes of meeting		Project Team Project Manager
13. Establish link with regional stakeholders, partners and interested groups	31/1/2005	19/04/2005	Collaboration links between partners		Project Partners Project Manager
14. Produce short briefing papers/publicity materials for stakeholders, partners and interested groups	31/3/2005	31/3/2006	Reports; issues, risks, progress		Project Partners Project Manager
15. Project Reporting (JISC & Advisory Board)	31/3/2005	31/3/2006	Reports; issues, risks, progress	Yes	Project Team Project Manager
16.					

Duration: [4] months

Work package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 3: Review and mapping exercise <u>Objective:</u> Review and mapping exercise to identify current practice at partner institutions	01/04/05	20/07/05			Newcastle Northumbria; Teesside; Durham;
17. Identify sample of stakeholders at partner institutions	01/04/05	20/05/05	List of stakeholders, contact details		PM/Project officer
18. Identify review and mapping areas to be investigated <i>wrt</i> Progress Files, PDP, recording basic skills, and use of (e)Portfolios	01/04/05	31/06/05	Documented flow diagram of areas of investigation		AMM/Project officer
19. Identify review and mapping areas to be investigated <i>wrt</i> existing technical infrastructure, data flow and legal baseline	01/04/05	31/06/05	Documented flow diagram of areas of investigation	Yes	GD/Project officer
20. Identify review and mapping areas to be investigated <i>wrt</i> enhancing the student learning experience	01/04/05	20/07/05	Documented flow diagram of areas of investigation	Yes	GD/Project officer

Duration: /4/ months

Work package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 4: Develop and establish potential use cases for a selection of current students in FE and HE institutions <u>Objective:</u>	01/04/05	31/07/05			Teesside supporting COSC & SRC
21. Develop and circulate sample forms for collecting hypothetical use cases (for testing)	01/04/05	31/06/05	Sample form for collecting use cases		SH/Project officer
22. Develop, conduct and document structured interviews and questionnaires with partner stakeholders (sample), in order to identify current practice in 18, 19 & 20 above	01/04/05	31/06/05	Report of current practice / baseline position		PM/Project officer
23. Collate/document hypothetical use cases	01/07/05	31/07/05	Compendium of use cases	Yes	Project officer
24. Identify and document potential barriers to collaboration	01/07/05	31/07/05	Analysis and report of current practice, use cases and project plan for critical path		PM

Duration: /9/ months

Work package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<p>WORKPACKAGE 5: Establishing a Regional Governance Framework</p> <p><u>Objective:</u> To understand the parameters and establish a Regional Governance Framework (with supporting development tool) for the NE FE/HE ICT community</p>	01/05/05	31/01/06			RW
25. Institutional Engagement (engage the range of institutional actors to explore the meaning and challenges of organisational 'joining-up' in the context of the proposed regional e-portfolio system)	01/05/05	30/11/05	Interim report and workshop		JC/RW
26. ePortfolio Lifecycle (establish the lifecycle of a ePortfolio to produce and in-depth understanding of the requirements of a regional ePortfolio system.)	01/05/05	30/11/05	Interim report and workshop		JC/RW/MM
27. Establish Regional Governance Framework (establish a process to support the development of a sustainable governance framework to facilitate the ongoing development of e-portfolios and other inter-institutional/cross-sector activity in the NE.)	01/11/05	31/01/06	Final Report and Workshop	Yes	RW/MM/JC
28. ePortfolio Partnership Development tool (produce a partnership development tool to facilitate the ongoing development of e-portfolios and other inter-institutional/cross-sector activity in the NE and other JISC regions.)	01/12/05	31/01/06	Partnership Development tool		RW/MM/JC

Duration: /8/ months

Work package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<p>WORKPACKAGE 6: Implement/establish ePortfolio servers</p> <p><u>Objective:</u> Implement and establish ePortfolio servers for all partner sites</p>	01/04/05	01/10/05			PO, SJC, TMcD
29. Assess student data sources (primarily management information systems)	01/04/05	01/08/05	Data flows and structures from all institutions		PO, SJC
30. Clone copies of ePortfolio system as necessary	01/04/05	31/06/05	Functioning ePortfolio servers		PO, SJC
31. Populate ePortfolio servers with institutional data	02/06/05	01/08/05	ePortfolio servers with institutional data installed	Yes	PO
32. Customise ePortfolio servers to institutional requirements	01/07/05	01/10/05			PO

Duration: /7/ months

Work Package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 7: Implement a technology interpretation/transfer negotiation layer <u>Objective:</u> Implement a technology interpretation/transfer negotiation layer	01/05/05	01/11/05			PO,SJC, TMcD
33. ioNodes familiarisation, setup of initial server	01/05/05	01/07/05	Initial server setup		PO, SJC, TMcD
34. Implement technology interpretation/transfer negotiation layer for reference (lead site) ePortfolio	01/06/05	01/08/05			PO, SJC, TMcD
35. Implement technology interpretation/transfer negotiation layer for additional site	01/07/05	01/08/05			PO
36. Test bi-directional transfer of data	01/08/05	01/09/05	Further sites setup		PO
37. Setup additional technology interpretation/transfer negotiation layer for other partner sites	01/09/05	01/10/05	Further sites setup		PO
38. Test document transfer of data with student examples	01/09/05	01/10/05	Further sites setup		PO
39. Implement and document the transfer of data with student examples	01/10/05	01/11/05	Further sites setup	Yes	PO

Duration: /9/ months

Work Package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 8 Install Shibboleth origin servers <u>Objective:</u>	1/04/2005	24/12/2005			
40. Establish a common conditions of use document for access to the ePortfolios system	1/04/2005	30/9/2005	A Legal framework that could be extended to other services that the partners might wish to share via shibboleth in the future	Yes	IAMSECT Project
41. System installation: to install Shibboleth infrastructure (1 x pubcookie server + 1 x origin) at each of the 6(7) partners	June	December			
42. Adapt eportfolio products as Shibboleth targets	June	December			
43. Establish a set of attributes to be used for authorisation	June	December			

Duration: /9/ months

Work Package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 9: Shibboleth component - infrastructure Objective: install Shibboleth infrastructure (WebISO +origin) at partner sites	1/04/2005	24/12/2005			
44. Establish a technical contact within each partner institution	April 05	May 05	List of technical contacts within each institution		PM
45. Assess feasibility of infrastructure installation at each site via questionnaire covering facilities, expertise, any existing webiso, password store, open ports.	April 05	June 05	Report on the feasibility of hosting Shibboleth architecture within each partner institution		GAD
46. If necessary, investigate feasibility of centrally hosted infrastructure	May 05	August 05	Report on feasibility of centrally hosted infrastructure		GAD, IAMSECT
47. Identify authorisation attribute source at each partner institution	May 05	Oct 05	Attribute source established		Tech contact, GAD, IAMSECT
48. Purchase and install WebISO and origin servers at each site	July 05	Oct 05	Infrastructure established	Yes	Tech contact, GAD, IAMSECT
49. If necessary and feasible, install centrally hosted infrastructure	August 05	24/12/2005	Centrally hosted infrastructure established		

Duration: /8/ months

Work Package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<p>WORKPACKAGE 10: Test and document transfer of data with real student examples; refine tools</p> <p>Objective: Test bi-directional transfer of data, i.e. the exchange of ePortfolio/progress file data between FE colleges, between HE institutions, and cross-sectorally, e.g. between an FE and an HE institution</p>	May	December			
50. Create a master set of suitable records for test data exchange between institutions, containing agreed real (or fictional) student 'use case' data for each partner. This will be based on the forms developed in WP3 and WP7.	May	July	Creation of standard test dataset	Yes	Project officers
51. Test data exchange within sectors: <ul style="list-style-type: none"> • FE – FE college • HE – HE institution 	July	October	Validation of data exchange protocols; documentation	Yes	Project officers
52. Test data exchange across sectors: <ul style="list-style-type: none"> • FE college – HE institution 	August	November	Validation of data exchange protocols; documentation	Yes	Project officers
53. Review the learner experience through 'talk aloud' protocols, reflection.	October	December	Qualitative description of the usefulness of shared learner records		KB/Project officers

Duration: [10] months

Work Package and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
WORKPACKAGE 11: Detailed dissemination and evaluation strategy Objective:	1/06/2005	31/03/2006			
54. Investigate dissemination interfaces	1/06/2005	31/03/2006			Partners Academy subject centre team JISC Regional Support Centre
55. Produce Dissemination Strategy and Plan	1/06/2005	1/07/2005	Dissemination Plan	Yes	Partners Academy subject centre team JISC Regional Support Centre
56. Review project documentation	1/07/2005	28/02/2006			Partners
57. Dissemination event (Regional)	28/02/2006	31/03/2006	Handbooks; Papers and Guides	Yes	Partners Academy subject centre team JISC Regional Support Centre
58. Dissemination event (National)	28/02/2006	31/03/2006	Handbooks; Papers and Guides	Yes	Partners Academy subject centre team JISC Regional Support Centre

This procedure is part of the EPICS Project documentation standards and is based on the PRINCE 2 methodology and incorporates the JISC requirements.

1. Purpose

This procedure outlines the reasons for the creation and delivery of a Work Package. A Work Package is a set of information which defines, in measurable terms, what must be done for the final product to be acceptable to the Advisory Board and to meet the project quality requirements. The Work Package is a formal agreement document between the Project Manager and Team Manager(s) about how the product will be created.

2. Scope

The **Work Package** will vary in content, and indeed in degree of formality, depending on circumstances. Where the work is being conducted by a team working directly under the Project Manager, the Work Package may be a verbal instruction, although there are good reasons for putting it in writing, such as avoidance of misunderstanding and providing a link to performance assessment. Where the work is being carried out by a Supplier under a contract and the Project Manager is part of the Customer organisation, there is a need for a formal written instruction in line with standards laid down in that contract.

3. Responsibilities

It is the responsibility of the Project Manager to ensure that staff affected by this process is informed of its content and that they will agree to adhere to the processes identified.

4. Procedure or Instructions

Document Header

The first page header should not change. Subsequent page headers will need to be updated to contain the Work Package title and reference number.

Document Footer

The file name should be entered automatically by the document template. If possible use either the title or reference number of the Work Package for the file name. Version number will only need updating if there is a version change. The date should update automatically – this date is the date of document creation or amendment not the date of issue of the Work Package.

The following instructions refer to the Work Package {WP/Code/nnn}

Front Page

Title

The title of the Work Package should be descriptive and specific to the product to be delivered.

Reference: WP

Category/Code/nnn

The numbering system to be applied is:

Project number xxx/

Stage number (use Stage 0 for general project documents and start up documents)

Sx/ Number of product as assigned by specific project numbering system x.x.x.

Example: WP0704/S1/3.0.1 = Project number 0704/ Stage 1/ WP number and Break down structure 3.0.1

The following are Self explanatory

Issue Version
Effective Date
Pages Reviewed
Description

Prepared by Authorised by

On completion the last section should be filled in by whoever is returning the completed Work Package to the Project Manager.

Distribution List/Media

To whom the work package is being sent. Remember, if the work package is part of a customer supplier chain, then it must also be sent to those who are responsible for producing the chained work packages.

Included Documents

Any additional or supporting documents that may be attached as specifications, standards etc

Work Package Timeline

The next part of the template is the Work Package Description timeline. (as defined by JISC)

A short Sentence giving a general description of the Work Package with reference to any other work packages that have been or are to be created

Planned time and costs

Complete the grid with start dates, length of work time in months.

Work Package and Activity

For each work package identified in the timeline, A short Sentence giving the objectives of the work package and a breakdown of the activity tasks. (also to be used in the Work Breakdown Structure diagram)

Earliest Start Date

Give the date when you will start the work package and each activity task.

Latest Completion Date

Give the date when you expect to complete the work package and each activity task.

Outputs / Delivery Criteria

Explain clearly the deliverables that will be produced by the work package and the activity tasks. Identify any techniques or processes relevant to the Work Package / activity tasks and specify anything, which is out of scope of the Work Package. Include any references to standards to be complied with, such as, the law, open source standards, documentation styles and / or templates.

Milestone

Identify if the Work Package / Activity Task is a milestone

Responsibilities

Identify the single person responsible for delivering the WP. Identify other people working on this product where known. Identify anyone involved in quality assurance for the WP.

Author Lawrence Taylor
EPICS
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Version 1.0

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