

# JISC Project Plan Template

*The Project Management Guidelines have detailed instructions for preparing project plans.*

*Expand tables as appropriate.*

*Fill in the information for the header, e.g. project acronym, version, and date.*

*Prepare a cover sheet using the cover sheet template and attach to the project plan.*

## Overview of Project

### 1. Background

*Summarise the background to the project (and how it builds on previous work) and the need for it (and why it's important).*

This bid has been prepared as a collaboration between HEIs, FECs and other related organisations in the Lancashire and Cumbria sub-region of the North West of England. It is based on the identification of a particular category of learners (or non-learners) who are 'isolated' from the educational opportunities offered in further, higher and related education. Access to these learners is often problematic. However, many of these 'isolated learners' are making tentative steps back into learning through a recognition that they need to develop their IT skills, either for work or more often for personal reasons. The FEC partners to this bid, in particular, make extensive efforts to reach out to these learners through their college and outreach IT programmes. The project will use these access opportunities and other opportunities that might occur during the life of the project. Such access to these learners offers clear opportunities to encourage them to reflect on their learning needs and to advise them on the many opportunities that exist to progress, either with IT or in any other area of learning relevant to their work and personal needs. The project will be centred on the trialling and evaluation of ePortfolios with a minimum of 100 "isolated learners" from across the partner institutions in a variety of situations as a tool to enable this personal reflection and the identification of progression opportunities.

### 2. Aims and Objectives

*List the broad aim or purpose of the project, and the specific objectives you intend to achieve.*

#### **Aim.**

To evaluate the potential of ePortfolios to facilitate and encourage isolated learners to engage with the lifelong learning agenda and to gain access to the opportunities provided by HEIs for personal and work-related development. To deliver the benefits of this project to Consortium members, and through JISC, more widely through the numerous networks involved in this project.

#### **Objectives**

1. Encourage and raise awareness of educational opportunities by isolated learners who make initial steps back into education through locally-led IT courses
2. Trial and evaluate ePortfolios as a way of encouraging isolated learners to reflect on their educational needs and aspirations and to advise them on opportunities for progression into and through higher education
3. Identify ePortfolio software that is suitable to the needs of the isolated learner, which can be adopted, and the data collected shared by all of the partners.
4. Ensure that the adopted ePortfolio includes information on how to apply for and access HE and the wide range of opportunities offered, including those offered by validated or franchised HE programmes at their local FEC.
5. Consult employer representatives on the value of ePortfolios to employers for the recruitment and development of their staff and for meeting skills gaps.
6. Share between the partners to this bid existing e-tools relating to personal development and to assess their relevance to ePortfolio tools developed by JISC and through open source software development.
7. Collate opportunities for progression to HE, especially through arrangements between HEIs and the FECs for locally-based provision.

8. Train IT tutors working with the isolated learners in the use of ePortfolios and how learners can be helped to benefit from them.

### 3. Overall Approach

*Describe the overall approach you will take to achieve the objectives outlined above, including:*

- *Strategy and/or methodology and how the work will be structured*
- *Important issues to be addressed, e.g. interoperability*
- *Scope and boundaries of the work, including any issues that will not be covered.*
- *Critical success factors.*

The project takes as its theme the 'isolated' learner who engages with education through ICT related programmes. However this does not limit the domain in terms of learners who can be involved with this programme. The demographic of this pilot will be formed by those learners that each partner organisation feels will benefit from the tools and support offered in the context of this pilot. It is likely that the populations will include pre-degree, foundation degree, first degree and postgraduate students undertaking both full and part time study. In addition it is hoped that work based learners will contribute to the evaluation in order to support the idea as a 'lifelong' proposition.

### 4. Project Outputs

*List the tangible deliverables (including reports) your project will create, and the less tangible knowledge and experience you hope to build and share.*

The principal output from the project will be the documentation and evaluation of pilot process models, operational procedures and support systems, integrated into FE, HE and employer systems. The project deliverables will include analysis on the personal development planning requirements of students from each partner institution, case studies of the learner experience and the project pilot and evaluation report.

The project will look to establish several definitions of 'isolated learner' (eg; geographic, socially isolated, isolated learner in the workplace, mature student). These will then set the background to the evaluation of the learner's experience of an e-portfolio, particularly in respect to its potential as a conduit for reflection of an individual's personal development.

The project also looks to establish networks amongst the sub-region with emphasis on the cultural acceptance between institutions (academic and non-academic) of the worth of a learner's record of achievement. The project will feed into a regional group (made up of those funded under the same strand in the North-west region) to compare and share findings from the respective programmes.

The project will work to form what it feels will be effective evaluation of the following 4 aspects:

- Evaluation of the learner's experience.
- Evaluation of the supporting tutor's experience.
- Evaluation of how the findings from this project can help shape the policy of individual institutions and the policy of institutions as a collective.
- Evaluation of how the project as a whole worked and how the collaboration of institutions in this area can be taken forward.

### 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.*

The project will help to shape institutional policies on e-portfolios for all students, but particularly in such a way as to ensure more isolated learners get into or back to learning.

It will facilitate progression for the isolated learner by:

- Ensuring that the process of engaging with an e-portfolio includes information on how to apply for and access FE and HE and the wide range of opportunities offered
- Demonstrating to employer representatives the value of e-portfolios in the recruitment and development of their staff and for meeting skills gaps.
- Collaborative approaches to personal development planning and sharing e-resources across institutions relating to PDP.
- Training supporting tutors in the use of e-portfolios and how independent lifelong learners can be helped to benefit from them.

## 6. Stakeholder Analysis

List key stakeholder groups and individuals that will be interested in your project outcomes, will be affected by them, or whose support/approval is essential, both within your institution and in the community, and assess their importance (low/medium/high).

Stakeholder	Interest / stake	Importance
8 Partner FE and HE institutions	Experience of implementing e-portfolios to inform policy on access and widening participation.	high
Supporting Tutors	Staff and curriculum development.	high
Learners	Access to opportunities. Can e-portfolios give a framework within which to build a skills set and to identify skill gaps.	high
Relevant Managers	Opportunities for collaborative working and policy formulation	high
Employers (Primarily Lancashire Fire & Rescue Service)	Collaboration with FE/HE and access to learning resources	medium
Centre for Recording Achievement	Collaborative working	low
HE Academy	Raising its profile in the sub region	low
Subject Centres	"	low
Aimhigher	Regional partnership	low
NTI	Access to students	low
East Lancashire Partnership	Meets objectives	low
Learning & Skills Council Lancashire	"	low
University Education in Cumbria (UEC)	Collaborative basis	low
2 x North-west regional bid teams	Shared expertise	low
Widening Participation Officers	Opportunities to meet institutions objectives	low
Educational Technologists	Extend expertise	low
Regional vocational training organisations	Collaboration with FE/HE	low

## 7. Risk Analysis

List factors that could pose a risk to the project's success, assess their likelihood and severity, and how you will prevent them from happening (or manage them if they if they occur). Cover the types of risks listed and any others that apply.

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
<b>Staffing</b>				
Failure to establish (early) key personnel in partners	2	5	10	Pre-project management meetings
Failure to co-opt sufficient students onto pilot	2	5	10	

<b>Organisational</b>				
Failure to maintain commonality of purpose with partners	2	5	10	Regular meeting of Steering and Management groups. With clear lines of communication between partners
<b>Technical</b>				
No agreement reached on software to be used for pilot	1	2	2	Define terms at start of project between partners
<b>External suppliers</b>	0	0	0	
<b>Legal</b>				
Failure to clarify terms of use to student	1	3	3	Seek advice from Secretariat
Data privacy issues between institutions interfere with record sharing	2	4	8	Define terms at start of project between partners

## 8. Standards

The majority of the partners will use Open Source Portfolio Initiative software to deliver an e-portfolio service to their learners for this pilot. The OSPI itself works closely with organizations such as IMS, OKI, SCORM, and IEEE and others to adopt existing standards, influence new standards, and implement them in the software. Lancaster University uses its own integrated e-portfolio system, this system also uses the IMS LIP specification. The project will promote greater awareness amongst the consortium of the need to define standards and API's that encourage software and data interoperability.

## 9. Technical Development

*Indicate how the project will follow best practice for technical development, and any specific technologies or development approaches the project will adopt and why.*

## 10. Intellectual Property Rights

*List any intellectual property owned by third parties that will be incorporated into project outputs, when/how you will obtain permission to use them, and any implications for project outputs after the project ends.*

The pilot service will be delivered from UCLAN or locally where institutions prefer. Users will be notified through the software interface of the terms and remit of the pilot and can accept or decline accordingly. Responsibility for these learners lies with each partner and the terms are clarified in the Consortium Agreement (Appendix \_\_)

The Management Committee will agree on existing support materials to be provided to the learner as part of this project. Each individual partner will be responsible for agreeing on which of their own materials can be made freely available on the project website. Each partner is also responsible for any materials it uses to support this project but that will not be made freely available. As per the consortium agreement the IPR of any supporting material used in connection with this project remains with the originator.

## ***Project Resources***

## 11. Project Partners

*List all project partners (including subcontractors), their roles, and the main contact. Indicate the date a consortium agreement was signed (or will be signed), and send a copy to the programme manager.*

For key contacts at the following institutions please see section 12 – 'Management Committee'.

Blackburn College  
 Burnley College  
 Carlisle College  
 Furness College  
 Cumbria Institute of the Arts  
 Edge Hill  
 St Martins College  
 University of Central Lancashire  
 University of Lancaster

Each partner will identify a minimum of 14 learners who may describe themselves as isolated in one of several ways to be defined by the Management Committee. Each partner agrees to employ a supporting tutor to help deliver the e-portfolio to their respective cohort. The 'live' date for this pilot will run in the first semester 2005/06. Each partner will help to procure evaluation material from the volunteering learners, the supporting tutor and a representative of the institution as a whole. Each partner may also contribute any material which it feels may support the learner. By agreement this material will be made available to learners from other institutions. The conditions for this are covered in the consortium agreement.

Consortium Agreement to be signed 13/05/2005.

## 12. Project Management

*Briefly describe the project management framework, including organisation, reporting relationships, decision process, and the role of any local management committee.*

*List all members of the project team, their roles, and contact details. Indicate the proportion of time the project manager will spend on project management.*

*Indicate if the project has training needs and how they will be met.*

**Programme Advisory Board.** One representative from each of the FEC/HEI consortium institutions, five co-opted members from related organisations, two employer representatives, external evaluator and nominee from the JISC regional body for the NW. To be chaired by the appropriate Pro Vice Chancellor of the lead HEI.

Patrick McGhee (Chair)	Pro Vice-Chancellor (Academic), UCLAN
Representative from the Management Committee	
Sarah Davies	Programme Manager, JISC
Janet Strivens	External Evaluator, CRA and Liverpool University
Rob Paine	Director, NTI
Dave Paton	Staff Development Officer, Fire Service Training
Ken Phillips	Director of Partnership, UCLAN
Neil Ringan	Project Manager, MANSLE, Greater Manchester Strategic Alliance Distributed eLearning Network, Bolton University
Roger Clark	Project Manager, The Learning Matrix, Cheshire and Merseyside Distributed eLearning Network, Liverpool University
Pam Houghton	Chair, FILE-PASS Management Committee, UCLAN
Paul Mahoney	Project Officer, FILE-PASS, Lancashire and

	Cumbria Distributed eLearning Network, UCLAN
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**Management Committee.** Senior member of the lead institution (to be nominated by lead HEI) to chair a management committee consisting of the Project Officer, the Project Team from the LDU and key contacts from each of the partner institutions.

Sarah Chesney <i>s.chesney@ucsm.ac.uk</i>	St Martins
Mark Nicholson (Head of Faculty – Contemporary Studies) <i>Mark.Nicholson@furness.ac.uk</i>	Furness College
James Murdock (Director of Learning, Planning & Technology) <i>JMurdock@carlisle.ac.uk</i>	Carlisle College
John Woodman <i>j.woodman@cumbria.ac.uk</i>	Cumbria Institute of the Arts
Terry Wareham (Director, CELT) <i>t.wareham@lancaster.ac.uk</i>	Lancaster University
Mark Allinson (Head of Business & Network Systems) <i>Mark.allinson@edgehill.ac.uk</i>	Edge Hill
Alan Hicks (Director, Information and Learning Technology NTI Board and New Technology Centre) <i>a.hicks@burnley.ac.uk</i>	Burnley College
Paul Kellett <i>p.kellett@blackburn.ac.uk</i>	Blackburn College

**Project Team in the LDU.** In addition to the above there will exist an operational group in the LDU whose expertise in certain areas will be called upon to help guide the project.

Paul Mahoney <i>pmahoney@uclan.ac.uk</i>	Project Officer
Sally Wade <i>sawade@uclan.ac.uk</i>	Specialist in FE colleges and personal development portfolios
Pam Houghton <i>pihoughton@uclan.ac.uk</i>	Head of LDU
Elizabeth Fish <i>efish@uclan.ac.uk</i>	Specialist in Project Management and Budget Administration
Fiona Jolley <i>fjolley@uclan.ac.uk</i>	Project Administration

### 13. Programme Support

*Indicate if there are specific areas where you would like support from the programme or programme manager.*

### 14. Budget

*Use the budget template and attach the project budget as Appendix A. Explain any changes from the budget in the agreed project proposal.*

## Detailed Project Planning

### 15. Workpackages

Use the workpackages template to plan the detailed project work and attach as Appendix B. Clearly indicate project deliverables and reports (in **bold**), when they are due, phasing of workpackages, and explain any dependencies. You may also attach a Gantt chart, diagram, or flowchart to illustrate phasing.

### 16. Evaluation Plan

Indicate how you will evaluate the quality of the project outputs and the success of the project. List the factors you plan to evaluate, questions the evaluation will answer, methods you will use, and how success will be measured. Expand as appropriate on how you will conduct the evaluation.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Month 7-9	The Learner's perspective/experience	In what way are you isolated? Preconceptions Usefulness Value for time	'Jottings' questionnaire – learners can take notes as they use the system.	Reliability. Ease of use. Utility. Connection with 'learning'. Connection with PDP processes. Acknowledgment.
Month 7-9	The Supporting Tutor's perspective/experience (in each) partner institution	Good focus for recording achievement? Usefulness. Value for time.	Interview and questionnaire.	Ease of training. Positive feedback from learners.
Month 10-12	The wider view of how each institution may take forward e-portfolios.	Practicality. Utility.	Review and report from each partner.	Practical insight.
Month 12	The FILE-PASS project itself.	Is there value in having close (sub-regional) links on the issues surrounding recording achievement.	Review by Programme Advisory Board.	Commitment to maintain partnership in some form.

Different groups and individuals will be asked to comment the processes concerned with the FILE-PASS project. Their roles will vary depending on what is being evaluated. However in general the roles will be as follows:

#### Role of Programme Advisory Board

The Project Advisory Board will determine the overall summative evaluation strategy. This evaluation of the project will focus on the value to 'isolated' learners and as a device by which academic staff can engage the isolated learner.

There will be a significant role for the External Evaluator who will confirm the appropriate quantitative and qualitative methodology adopted for evaluation. The primary role of external evaluator will be to ensure that the approach adopted for self-assessment is comprehensive, transparent and flexible in order to provide the necessary feedback to develop and achieve the project goals in the most efficient way. The External Evaluator will be a member of the Programme Advisory Board as a participant

observer and will be responsible for advising on the design of the evaluation strategy and the methods and procedures to be used as well as providing independent judgement on the outcomes of the evaluation.

We will take advice from Janet Strivens (External Evaluator on the Programme Advisory Board) about the best way of approaching the Subject Centres. Janet is seconded to the Centre for Recording Achievement, which closely collaborates with the HE Academy and has knowledge and experience of the use of Progress Files, ePortfolios and Personal Development Planning across the HE sector.

### **Role of Management Committee**

The Management Committee members will be responsible for organising evaluation of learners and supporting staff in their own institutions. The evaluation process will be carried out at each University under the direction of the appropriate Management Committee member in conjunction with the project manager.

### **Role of End Users**

The end users (academic staff, students, graduates, employees – ‘isolated learners’) will be asked to comment on overall value as well as assessing models (and possibly associated materials and features such as portfolio review and mentorship).

Employers and professional bodies may also be asked to comment on the likely impact and effect of the project’s deliverables.

## **17. Quality Assurance Plan**

*Explain the quality assurance procedures you will put in place to ensure that project outputs comply with JISC technical standards and best practice, and what will constitute evidence of compliance.*

The main outputs of the project are evaluation materials drawn from 4 areas.

1. The Learner
2. The supporting Tutor
3. The individual institutions view
4. The project as a whole

The quality of the evaluation materials presented to 1 & 2 & 3 will be determined largely by peer assessment amongst the Management Committee with advice from the Programme Advisory Board. The project as a whole will be advised by the Programme Advisory Board and assessed by the external evaluator, details are available in section 16.

The Learners will be given advance notice of when the evaluation is to take place and given sufficient time to complete the evaluation material. The supporting Tutor will be on hand to give advice to the Learners and answer any queries that may arise with the evaluation questions.

The supporting Tutor will be briefed by the Management Committee and the Project Team on how to deliver and support the evaluation materials to the students.

The Learners perception of the quality of the service and the supporting Tutor’s view of the quality of support from the project will be recorded in their respective evaluation documents. It will also be monitored locally as the project is developing by the Management Committee representatives from each partner and the Project Officer.

As this project takes place at the intersection of a number of epistemologies the project will aim to set itself small chunks of deliverables to be agreed and taken forward in line with the schedule for the Management Committee meetings (Approx every 4 weeks). This will help to ensure the project has the scope to focus on ‘quality enhancement’ as well as ‘quality assurance’ (see fig. 1). These deliverables will be prompted and recorded in the form of a set of questions which will form the basis of the Management Committee meetings. These ‘questions’ will be published as part of the project documentation and may be reviewed by the Programme Advisory Board and the JISC.

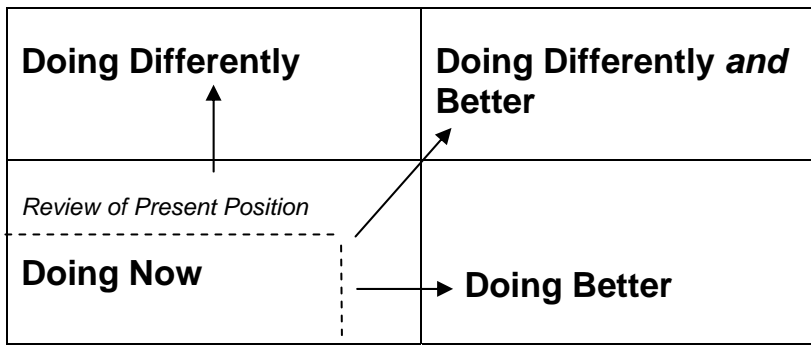


Fig 1. The Enhancement Matrix (*Managing Educational Development Projects, C Baume et al, 2002*)

### 18. Dissemination Plan

Explain how the project will share outcomes and learning with stakeholders and the community. List important dissemination activities planned throughout the project, indicating purpose, target audience, timing, and key message.

Timing	Dissemination Activity	Audience	Purpose	Key Message
Ongoing	All partners and interested others event to reflect on findings from evaluation.	Sub region	Gain understanding of different perspectives on implementation of project.	
Quarterly	Reports to NW Universities Association	NWUA		
End of project	Evaluation materials to be made available publicly	FE/HE Community	Share findings	
End of project	Regional event with all sub-regional projects presenting.	Regional pilots	Draw together experience and feed into regional strategic thinking.	
	Possible presentation at Jisc/ALT-C event. Possible submission to ALT-N.	JISC, ALT	Inform wider community of project.	

### 19. Exit/Sustainability Plan

Explain what will happen to project outputs at the end of the project (including knowledge and learning). Focus on the work needed to ensure they are taken up by the community and any work needed for project closedown, e.g. preservation, maintenance, documentation.

Project Outputs	Action for Take-up & Embedding	Action for Exit
Evaluation data to feed into institutional strategies for implementation (or otherwise) of e-portfolios	Evaluation findings will feed into individual institutional debate on implementation. Continued activity of consortium in exchange and development of ideas and best practice.	Consortium experience to feed into regional and national dialogue.
Continued provision of	E-Portfolio service to continue until	Service discontinued e/o

web service e-portfolio interim to partners local installation?	end of academic year 2005/06.	academic year.

*List any project outputs that may have potential to live on after the project ends, why, how they might be taken forward, and any issues involved in making them sustainable in the long term.*

<b>Project Outputs</b>	<b>Why Sustainable</b>	<b>Scenarios for Taking Forward</b>	<b>Issues to Address</b>
Strong sub-regional network able to exchange ideas regarding e-portfolios.	Mutually beneficial collaboration	Further collaboration on bids and projects	Capture effective and ineffective practice

## ***Appendixes***

### **Appendix A. Project Budget**

### **Appendix B. Workpackages**

JISC Project Management Framework  
22 December 2003

Paul Mahoney	23:02:05
PM	25:02:05
PM	24:03:05
PM	30:03:05
PM	01:04:05
Fiona Jolley	07:04:05
PM	25:04:05
PM	27:04:05