



## Project Plan Cover Sheet

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# JISC Project Plan

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## Overview of Project

### 1. Rationale

The ***Enhancing Learner Progression through Personalised Learning Environments (ELP2)*** is a two year project that will investigate, identify and evaluate solutions to the issues and challenges that arise in providing a personalised learning experience which meets the needs of individual lifelong learners in a range of settings. The project will explore these issues through the use of e-Portfolios and social software (Web 2.0) to support widening participation and the development of skills essential to successful lifelong learning.

This project will build on the outcomes of the JISC funded ***Enhancing Learner Progression (ELP)***<sup>1</sup> project<sup>2</sup>, and other projects in the Regional Pilots strand of the JISC Distributed e-Learning programme<sup>3</sup>, particularly the ePistle, MyWORLD, PDP4Life and FilePASS projects.

### ELP1 findings

The original ELP project (hereinafter referred to as ELP1) ran from Mar 2005 to Dec 2007. ELP1 explored and evaluated the potential of e-portfolios to support students at key transfer points in their lifelong learning journey: moving from school/FE to University; moving from University into the workplace; and moving between institutions. Through the ELP project we developed an informed, evidence-based understanding of: the use and usability of the e-portfolio tools (PebblePad and Bodington) within particular contexts; the role and effectiveness of e-portfolios in supporting lifelong learning and student progression; interoperability; technical and organisational issues. These findings, in particular what we have learned about the initial and sustained engagement of users in e-portfolio usage, are informing ELP partners, as well as the wider HE/FE communities, institutional strategies on e-Portfolios and PDP. However, the ELP findings also suggest that even though an e-portfolio can assist and help learners at transition points, its success ultimately lies in how it is 'marketed' to its potential users and, equally importantly, their educational supporters. The initial training offered to users, transparent technical implementation and the engagement of tutors are important factors that influence the learner's use of the e-portfolio. Ownership of the portfolio was perceived by many ELP learners as being vested in the institution and its use was based around formal instruction and assessed activities. This resulted in the tutor engagement having a significant impact on take-up, with little use by learners beyond the formal activities.

### ELP2 focus

In ELP2 we want to address these factors that are limiting learner engagement. ELP2 will do this by investigating the potential of less formal, personal online support tools and services where ownership is more likely to be vested in the users (ie learners) and less dependent on institutional systems, formal learning and support. Key issues we identified in ELP that we want to investigate in ELP2 include: the nature of ownership, assessing reflective ability and learning, time issues, and feedback.

In ELP2 we wish to establish the extent to which e-Portfolios enhance the ICT, digital and creative skills of participants compared to blogs and other social software. In addition, we wish to establish the combination of tools that most effectively support active learner engagement and the development of skills that are required in the future to enhance local economic development and increase business start-up.

The main focus of ELP2 is to provide flexible delivery of personalised learning experiences in a supportive and collaborative environment in order to extend widening participation opportunities, improve take-up, and enable learners to develop the essential skills they need for

<sup>1</sup> <http://www.elp.ac.uk>

<sup>2</sup> The ELP project was funded under the Regional Pilots strand of the JISC Distributed e-Learning Programme. The project ran from 1 March 2005 until 31 December 2006.

<sup>3</sup> [http://www.jisc.ac.uk/whatwedo/programmes/programme\\_edistributed/pilotsdetail.aspx](http://www.jisc.ac.uk/whatwedo/programmes/programme_edistributed/pilotsdetail.aspx)

successful lifelong learning. ELP2 builds on the experiences of the ELP project by extending the flexibility and choices of personalised learning environments through the provision of a wider variety of online services particularly social software, sometimes referred to as Web 2.0 (Anderson, Feb 2007), including blogs, wikis, instant messaging (IM), texting, social networking services and social book marking (tagging) services (see Anderson, 2007 for examples).

We will examine the impact and roles of the different technologies with particular emphasis on structured vs unstructured support, formal vs informal learning, individual vs networking/ collaborative perspectives and support, and public vs private spaces, and the extent to which these can provide and support flexible and personalised learning across institutional boundaries. ELP2 will also explore the use of these systems to establish and expand informal support networks amongst learners, teachers, careers advisers, community group leaders, creating spaces for them to build knowledge, and share good practice and experiences. A particular issue is the extent to which these virtual networks can be developed entirely online or need to be based on existing real social networks.

ELP2 addresses DfES and HEFCE national strategic aims of facilitating progression, flexible delivery and personalised learning experiences that support the development of lifelong learning skills and widening participation. It also links with the DfES aim of ensuring that all young people make the correct choices, both post 16 and 18, which can contribute to reducing drop out and youth unemployment.

Specifically, the ELP2 project seeks to:

1. Establish the impact of Individual Learning Plans (ILP), required by 2008, on regional lifelong learning initiatives and identify ways in which the integration and interoperability issues can be addressed by these social network technologies. Our particular focus is on ensuring that ELP2 partners' WP initiatives integrate effectively with our partner schools and colleges as they start to implement ILPs. This is an important regional issue that will affect all schools, colleges and universities.
2. Extend the provision of widening participation opportunities to a broader range of learner groups beyond the 16-19 group in full-time formal education that was targeted in ELP, through the use technologies that support more informal approaches to learning. These would include mature learners, excluded and isolated learners, learners from BME and other priority groups, and individual learners following non-traditional entry routes.
3. Demonstrate how social software can enhance the capacity of learner groups and other stakeholders within the region to form support networks which can provide peer and mentor support, engender a sense of a wider community of learners and create shared knowledge, advice and guidance.
4. Establish the extent to which social software engages and motivates learners and enables them to develop the skills essential for effective lifelong learning, eg self-analysis, reflective skills.
5. Complete a longitudinal evaluation of the experiences of ELP participants (and subsequent cohorts) that have transferred from School/FE into HE, and HE into workplace settings as they progress in their lifelong learning journeys.

ELP2 is a learner focussed project which builds on the partnerships and collaborations that were in place for the ELP project. ELP2 seeks to expand the technologies used to improve and extend our support for widening participation though flexible delivery and individual learning to a wider range of participants and with a focus on establishing a range of support networks and resources.

## 2. Aims and Objectives

The project has five broad aims as outlined below.

Aims	Objectives
<p>1. Ensure the effective integration of ELP2 project partners' WP initiatives with our partner schools, colleges and LEAs as they implement Individual Learning Plans (ILP) for 14 to 19 learners by 2008.</p>	<ul style="list-style-type: none"> <li>• Identify and document the ILP approaches/systems being adopted by ELP2 partner regional LEAs, colleges and schools.</li> <li>• Identify appropriate standards that can support integration and interoperability between ELP2 and their regional WP partners and the role that social software might contribute towards integration.</li> <li>• Provide guidance on the organisational, administrative and technical integration and interoperability issues to ELP2 project partners, participating colleges and schools.</li> </ul>
<p>2. Extend the provision of WP opportunities to a broader range of learner groups within the region beyond the 16 to 19 learners in full-time formal education that was targeted in ELP, through the use of technologies that support more informal and user-centred approaches to learning.</p>	<ul style="list-style-type: none"> <li>• Identify a range of appropriate target WP groups of learners, eg mature learners, excluded and isolated learners, learners from BME and other priority groups, and individual learners following non-traditional entry routes.</li> <li>• Identify, evaluate and select appropriate and available technologies and services or combinations that can be used to facilitate learner engagement and uptake, and the development of lifelong learning skills.</li> <li>• Engage these groups in learning activities through the use of an extended range of formal and informal technologies (e-Portfolios and Social Software).</li> <li>• Evaluate the extent to which these technologies effectively support these learners in providing accessible, flexible and personalised learning experiences.</li> </ul>
<p>3. Extend and improve ELP partners' community engagement and demonstrate how social software can enhance the capacity of learner groups and other stakeholders within the region to form support networks which can provide support, engender a sense of a wider community of learners and create shared knowledge, advice and guidance.</p>	<ul style="list-style-type: none"> <li>• Identify existing and potential support networks, community groups and interest groups within the region which may benefit from the use of social software, eg: learners, tutors, parents, employers, careers adviser, and community groups.</li> <li>• Work with these groups to scope the potential of these technologies to support their communities – user needs analysis.</li> <li>• Identify, evaluate and select appropriate and available technologies and services or combinations to use with these groups – systems specification</li> <li>• Implement and support the selected solution over an agreed period.</li> <li>• Evaluate the extent to which these services effectively support these groups in an accessible and flexible way, and meet their needs.</li> </ul>

Aims	Objectives
4. Evaluate the impact of social software on individual learners engagement, motivation and the development of lifelong learning skills.	<ul style="list-style-type: none"> <li>• Identify one or two successful learners/participants from each use case.</li> <li>• Identify the participants' perception of success and how they measure themselves against these criteria, and the factors that the participants feel contribute to their success.</li> <li>• For each, identify and analyse the extent to which these technologies engaged and motivated them and enabled them to develop the skills essential for effective lifelong learning, eg self-analysis, reflective skills.</li> </ul>
5. Complete a longitudinal evaluation of the experiences of ELP participants and their impact on learners' lifelong learning skills, attitudes and practices.	<ul style="list-style-type: none"> <li>• Evaluate the quantitative data on learner progression options and choices in their transition to the next stage of their lifelong learning journey.</li> <li>• Undertake a qualitative evaluation of the characteristics of a number of successful participants from ELP1 case studies, with a particular focus on their lifelong learning skills, attitudes and practices.</li> <li>• Monitor and record the ongoing progress and development of partner WP initiatives from ELP1 in Context 1: moving from School/FE into HE.</li> <li>• Evaluate the growth, impact and embedding of these WP in the ELP2 partner institutions over the life of the project.</li> </ul>

### 3. Overall Approach

ELP2 will adopt a similar case based approach to that used in ELP1. This will enable us to build on the expertise and experiences developed in ELP1, allow us to continue to capture the rich and complex picture of individual and unique use cases while still allowing us to pull out common themes and experiences across these use cases.

#### Project phases

The project will be divided into three phases:

1. Scoping and planning (Jan to Aug 2007);
2. Implementing and evaluating use cases (Sept 2007 to Aug 2008);
3. Project evaluation, dissemination and closure (Sept to Dec 2008).

We anticipate that phases will overlap with ongoing planning, identification of use cases and cross project evaluation being undertaken throughout the project, albeit to a more limited extent in their non-core phases.

#### Scoping and Planning

The main challenge for ELP2 is to identify and engage with appropriate use cases for the two main scenarios addressed by aims 2 and 3: widening participation with excluded, disenfranchised and hard to reach groups, and community based groups and support networks. Phase 1 will focus on identifying and planning the engagement with real use cases needed to achieve the project objectives.

In this phase we will identify and work with accessible (opportunistic) uses cases to develop:

- our understanding and experience of currently available social software and services,

- processes and models for the use of these services in supporting learning and community building,
- appropriate evaluation strategies and instruments and identify and engage with target groups in preparation for phase 2.

The project will work through the ELP2 partners' widening participation and community engagement initiatives in order to access and engage with non-traditional learners and community groups. The ELP2 project will also build on the existing relationships between the ELP partners and regional schools and colleges and relationships established through the ELP project.

### **Implementing and evaluating use cases**

This phase will form the main part of the project implementation. We will focus on working with and supporting identified groups of learners and networks to implement and evaluate the use of social software in meeting their needs, helping them to achieve their objectives, and building capacity to enable them become self-sustaining communities beyond the life of the project. Each use case will be assigned to, and be the responsibility of, one of the project officers.

### **Project evaluation, dissemination and closure**

The final phase of the project will focus on implementing sustainability plans for the use case groups and communities; drawing together and synthesising the overarching project findings arising from the individual use cases; and publishing recommendations and guidance based on these findings.

### **Work structuring**

Each ELP partner key contact, with the support of an ELP2 project officer, will be responsible for identifying and engaging with their local groups. The management of this process is devolved to the local ELP2 partner but it is envisaged that regular local review meetings will be held at each partner institution to track progress, raise and address issues and determine implementation strategies. Common target groups, themes and issues will be identified by the project officers and be reported on through the project blog and discussed at the monthly ELP2 project meetings. Each use case will be managed as a separate work package.

## **Important Issues to be addressed**

Issues to be addressed include:

- the nature and role of e-support in informal learning and networking:
  - structured vs unstructured support,
  - formal vs informal learning,
  - individual vs networking/collaborative perspectives and support,
  - public vs private spaces,
- transfer of control from tutor to learner,
  - nature of ownership,
  - active engagement of learners,
  - developing reflective skills,
  - development of lifelong learning skills,
- the ability of participants and other stakeholders to
  - develop informal support networks,
  - create shared knowledge resources,
  - build community capacity to support lifelong learners.
- standards and interoperability of selected social software services

- with each other
- with institutional system

## Scope

The project will focus on pre-existing target groups of learners and existing networks and support groups. The project will not attempt to artificially create new groups or networks unless a pre-existing need or requirement has been identified and articulated by the potential users.

## Critical success factors

**Through this project we are aiming to:**

- Identify what prior experiences and uses of social software students are bringing to University through formal and informal use.
- Identify how learners' attitudes, behaviours and values affect their use, and willingness to use, social software for formal (organised) learning.
- Demonstrate how social software and web-based tools can enhance widening participation into higher education, for example by providing innovative ways of enabling learners to present learning outcomes and achievements in a digital format increase engagement, motivation and learning, by creating a range of user groups and communities.
- Effectively apply social software to engage a broad range of learners and for their benefit of learners.
- Demonstrate how social software can engage individual learners, increase motivation and support the development of lifelong learning skills.

**We will evidence this through:**

- A broad range of use cases that outline different aspects of practice. From these use cases we can learn lessons about the effective uses of social software in the context of widening participation. These case studies will be clustered around our identified target groups which include mature learners, excluded and isolated learners, learners from BME and other priority groups, and individual learners following non-traditional entry routes. Our preliminary targets are three use cases in each target cluster area, targeting 40 participants across each use case cluster.
- Successful use of social software to engage individuals and communities will be evidenced by the numbers of users that actively engage with the social software tools including: learners, tutors, parents, employers, careers adviser, and community groups.
- Sustained use of social software by use cases beyond life of project support.
- New technology-based supports for lifelong learners
- Increased participation
- New approaches to personalise learning
- Increased capacity, knowledge and skills in participants
- Increased engagement with target communities
- Enhanced feelings of learner confidence, active engagement of participants and evidence of lifelong learning skills in targeted learners. Evidence will include
  - Patterns and evidence of sustained usage.
  - Numbers of successful applications to university or work.
  - Numbers of targeted learners able to identify and access relevant support.

- Number of targeted learners able to make successful transitions to work, training or to further or higher education through greater self awareness and increased knowledge of application processes.
- Greater use of wikis, digital storytelling, photo-sharing software to present learning outcomes.
- WP students have a broader 'field' of influence.

**We will compare the project-end situation with:**

- Current approaches to, and use of, personalised learning and flexible delivery.
- Current use of e-learning and social software by stakeholders.
- Current participation rates in institutional partners widening participation and community engagement activities.
- Previous numbers of successful applications to university or college courses/work/training from schools and FE institutions and/or comparison with national/regional average.
- User/participant perceptions of value added by social software in meeting their aims and needs and contributing to their internal communication and participation and engagement by group members.

**4. Project Outputs**

In addition to project outputs (P) each of the five project areas listed below will produce specific deliverables and outcomes that contribute to the overall project deliverables. Further details of these five foci are provide in Appendix C: ELP2 Focii: Five areas of investigation.

1. Impact of Individual Learning Plans (ILPs) on regional widening participation partnerships.
2. Impact of social software in extending the take-up of widening participation opportunities.
3. Establish and expand informal support networks.
4. Impact of social software on individual learners' engagement, motivation and lifelong learning skills.
5. A longitudinal evaluation of the experiences of ELP participants and their impact on learners' lifelong learning skills, attitudes and practices.

<b>Project or Focus area</b>	<b>Deliverables</b>
2 and 3	<ul style="list-style-type: none"> <li>• New use cases (15 to 20)</li> </ul>
P (mainly 2 and 5)	<ul style="list-style-type: none"> <li>• Evaluation and comparison with existing ELP1 use cases between using social software and e-portfolios to support lifelong learning.</li> </ul>
P, 1, 2, 4 and 5	<ul style="list-style-type: none"> <li>• Good practice models and learning materials for teachers, careers advisers and other regional stakeholders in the co-ordination of activities which could underpin the formulation of ILP's into the curricula and embed delivery.</li> </ul>
2 and 3	<ul style="list-style-type: none"> <li>• Community spaces for teachers, careers advisers, community group leaders etc to build knowledge, share good practice and experiences.</li> <li>• Guidance on how to set up user-based, user-driven groups reputations trust</li> </ul>
4 (but also 2 and 3)	<ul style="list-style-type: none"> <li>• An evaluation report on the impact of social software on individual learners' engagement, motivation and development of lifelong learning skills.</li> </ul>
1	<ul style="list-style-type: none"> <li>• A report on the ILP solutions being adopted by regional LEAs,</li> </ul>

Project or Focus area	Deliverables
	<p>schools and colleges along with a set of recommendations as to how integration issues can be addressed within the context of the e-Framework and other relevant standards and the role of social software in this process.</p> <ul style="list-style-type: none"> <li>• A set of recommendations for each partner institution to support and promote the seamless progression of students, and their ILPs, from School and FE into HE and WBL within the region</li> </ul>
2 and 3	<ul style="list-style-type: none"> <li>• An evaluation report on the technical options and project choices of social software with a focus on usability, accessibility, fitness-for-purpose and interoperability.</li> </ul>
1, 2 and 3	<ul style="list-style-type: none"> <li>• A set of recommendations for each partner institution addressing issues to support and promote the seamless progression of students from School and FE into HE within the region.</li> </ul>
1, 2 and 3	<ul style="list-style-type: none"> <li>• A set of recommendations as to how the use of social software can be addressed within the context of the e-Framework and other relevant standards.</li> </ul>

In addition ELP2 will produce a range of more intangible deliverables including:

- an enhanced understanding and knowledge base within the partner institutions as to progression and transfer issues relating to all areas of project investigation,
- raised awareness and understanding of organisational, administrative and technical integration issues in adopting social software solutions,
- a knowledge capacity with in the ELP2 project team and project participants regarding social software, its potential, effective use in supporting widening participation and appropriate educational and pedagogical uses,
- contribute to the ELP2 partners' institutional capacity to evaluate social software (Web 2.0) in relation to their own strategies and requirements and make informed decisions in relation to its effective adoption and integration with institutional system,
- building capacity within the region for learners and other stakeholders to use social software themselves to meet their identified needs and requirements,
- building a knowledge and capacity in the potential and use of social software within our participants,
- an increased capacity and understanding amongst the project team and within the partner institutions WP teams as to the factors influencing these aspects of learner behaviour and success,
- improved links and communication with regional schools and colleges in relation to progression and widening participation,
- an improved understanding of the factors that motivate learners engaging with lifelong learning; the factors which influence learners' application of these lifelong learning skills; and the learners' attitudes towards these skills and their usefulness in practice.

## 5. Project Outcomes

The outcomes of this project will include:

- Potential for the e-transfer of learner data between school/college and university.

Project Focii	Outcome	Impact	Change
2, 3 and	Partner institutions using social software solutions	More flexible and targeted services which	HE Widening participation activities

<b>Project Focii</b>	<b>Outcome</b>	<b>Impact</b>	<b>Change</b>
4	to support the delivery of lifelong learning skills, improve flexible delivery and provide personal learning environments to support progression and widening participation; and community engagement.	engage hard to reach groups	reach broader and more diverse range of potential learners.  Ongoing and expanding use in the application of social software in support of ELP2 partners widening participation strategies and activities.
2, 3, and 4	Informed and evidence-based institutional decision making regarding the adoption of social software.	Building capacity, knowledge and understanding of potential of social software across partners and participants.	More effective practice in selecting, adopting and implementing social software solutions to support student learning.
2, 3, and 4	Contribution to the regional and national evidence-base and debate on appropriate and effective use of social software for formal and informal learning, higher education, widening participation, lifelong learning and community networking.	Building capacity, knowledge and understanding of potential of social software within the region, particularly community and support groups.	A number of virtual communities within the region using social software to provide flexible support for community groups, regional lifelong learning and widening participation.
1 and 5	Identification of technical and organisational issues in transferring content between ILPs and University systems.	Knowledge and experience gained in e-support for students transferring from school to HE.	Increased automation of transfer of learner progress data and artefacts between school/college and university.
2 and 5	Evidence based on progression in HE of WP participants involved in ELP1.	Better understanding of transition process and factors that influence student success	Improved practice and use of social software in Institutional progression and retention strategies

## 6. Stakeholder Analysis

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
JISC Programme Manager (external)	Funding Body, interested in outcomes	High	Advice, feedback and guidance on aspects of project deliverables, outcomes, planning and evaluation and budget  Provide access to appropriate support services and materials.  Establish and facilitate cross programme links, communication and collaboration with other projects.	Unknown but could include  busy, therefore limited time for individual projects  prefer hands off approach	Meet JISC project reporting requirements  Keep in regular communication, beyond JISC requirements (monthly email or by exception?)  Provide access to project blog	Project Manager
Project Director (Bradford)	Project owner and Bradford Sponsor  Commitment to project success	High	Commitment to sponsor project within own and partner institutions, across region (eg Yorkshire Universities) and Nationally.  Identify possible collaborators and/or relevant work from other networks across the UK and nationally, eg CRA  Identify and gain internal support from other internal institutional stakeholders	No money available in budget for work on project  extremely busy with many competing demands on time and conflicting priorities  time may be an issue	Member and Chair of Project Management Team – regular monthly meetings  Member of SG  Access to project blog	Project Manager
Partner Institutional Sponsors	Provide promotion and sponsor project in	High	Commitment to sponsor project within own and partner institutions, across	No money available in budget for work on project	Member of Project Management Team – regular monthly meetings	Project Manager

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
(team and beneficiary)	their institution Commitment to success		region (eg Yorkshire Universities) and Nationally. Identify and gain support from their internal institutional stakeholders Manage local progress of their use cases.	extremely busy with many competing demands and priorities time maybe an issue	Member of SG Access to project blog	Project Director
Project Manager (team)	Successful delivery of project within time and budget.	High	Plan project, manage risk, manage liaison and communication across partners, monitor and report progress. Help partners identify appropriate use cases. Liaise with funder (JISC).	No money available in budget for work on project extremely busy with many competing demands and priorities inability to commit necessary time at appropriate points	Member of Project Management Team – regular monthly meetings Report to SG Access to project blog	Project Director
Project Officers (team)	Successful completion of project work Enjoy work and committed to project	High	Introduce and engage teachers, learners, mentors and other participants in each use case in use of social software Provide regular updates on progress. Contributing to planning and undertaking of evaluation and dissemination. Write up use cases.	Lack of skills in particular areas, eg use of social software, evaluation and availability of staff development Leave project	Involvement in reporting to SG Member of Project Management Team with regular monthly meetings Weekly report on activities and plan for coming week Regular contact by phone and email Give a stake in approaches to use cases and level of autonomy in	Project Manager

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
					managing these.	
Institutional WP co-ordinators (team and beneficiary)	Policy and process owner who determines institutional policy and access to Widening Participation	High	Help in identifying use cases Provide experiences staff to be involved in use cases, and project Commitment to implementing change	Lack of clarity of project aims leading to lack of commitment. Lack of availability Don't see value in deploying staff on a project that might distract them for core duties Unable or unwilling to help identify use cases Need to sustain use case support after project	Involve in SG Involve in Project Team if willing, or provide regular update meetings with institutional sponsor/project manager.	Project Manager Project Director and Project Sponsors
Institutional Community engagement co-ordinators (beneficiary)	Policy and process owner who determines institutional policy and access to Widening Participation	High	Help in identifying use cases Provide experiences staff to be involved in use cases, and project Commitment to implementing change	Lack of clarity of project aims leading to lack of commitment. Lack of availability Don't see value in deploying staff on a project that might distract them for core duties Unable or unwilling to help identify use cases Need to sustain use case support after project	Involve in SG Involve in Project Team if willing, or provide regular update meetings with institutional sponsor/project manager.	Project Manager Project Director and Project Sponsors

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
Use Case contacts (WP) (beneficiary)	Manage projects and/or staff that will engage with project	High	<p>Access to their project/network to enable</p> <p>Help in identification of needs</p> <p>Input into selection and implementation of social networking solutions</p> <p>participation in evaluation</p>	<p>Lack of interest in project</p> <p>Unclear about benefits to them of participation</p> <p>Think it will be more work</p> <p>Unwilling to use social software</p> <p>Concern about non-technical risks of using online systems, eg privacy, safety etc.</p>	Involve in regular meetings, updates, take issues on board	Project officers
Use Case learners (WP) – (beneficiary)	Users of social software services	High	<p>Use social software to support their learning and other related activities for duration of project</p> <p>Contribute to evaluation of system and impact</p>	<p>Lack of interest and unwilling to participate</p> <p>Lack of skills to participate, concerns about training don't like novel environment</p> <p>Concern about impact on assessment and workload.</p>	<p>Use social software to keep in contact and provide updates</p> <p>Set up user group and get them involved</p>	Project officers
Use Case support participants (WP) – teachers, mentors, support staff	Users of social software services	High	<p>Develop or adapt learning programmes/ courses/ activities to use social software and to support learners in their use</p> <p>Contribute to evaluation of system and impact</p>	<p>Lack of interest and unwilling to participate</p> <p>Lack of skills to participate, concerns about training</p> <p>Concern about impact on assessment and</p>	<p>Use social software to keep in contact and provide updates</p> <p>Set up user group and get them involved</p>	Project officers

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
(beneficiary)				workload. Challenge of providing support to learners		
Use Case contacts (community) (beneficiary)	Manage/direct projects and/or groups that will engage with project	High	Access to their project/network to enable identification of needs selection and implementation of social networking solutions participation in evaluation	Lack of interest in project Unclear about benefits to them of participation Think it will be more work Unwilling to use social software Concern about non-technical risks of using online systems, eg privacy, safety etc.	Involve in regular meetings, updates, take issues on board	Project officers
Use Case participants (community) – (beneficiary)	Users of social software services	High	Use social software to support their learning and other related activities for duration of project Contribute to evaluation of system and impact	Lack of interest and unwilling to participate Lack of skills to participate, concerns about training, don't like novel environment Lack of access to social software Concern about non-technical risks of using online systems, eg privacy, safety etc.	Use social software to keep in contact and provide updates Set up user group and get them involved	Project officers

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
Providers of social free software services (external)	May find evaluation findings interesting	Low	Access to and use of free web 2.0 social services	May not like use of their systems for these purposes	Monitoring	Project Manager
Support staff (careers, access, guidance) in Universities	Promotion and use of social software to support raising student aspirations, planning pre-entry activities and recording their attainment.	High	Participation and support of learners via social software	Lack of interest in project, don't see relevance Worried about increase in workload Lack of skills and concern about staff development and support	Involvement in user groups Involvement in identifying benefits and goals	Project Officers
WP schools and colleges (external)	No direct stake but may use findings to inform actions and raise awareness	High	Share Information about their implementation approaches to ILP	Unwilling to participate Lack of clarity about project aims/objectives Concern about non-technical risks of using online systems, eg privacy, safety etc.	Involve in SG	Project Manager/ Director
LEA (external)	No direct stake but may use findings to inform actions and raise awareness	Med	Share Information about their implementation approaches to ILP	Unwilling to participate Lack of clarity about project aims/objectives Concern about non-technical risks of using online systems, eg privacy, safety etc.	Involve in SG	Project Manager/ Director

Stakeholder	Stake in the project	Potential impact on Project	What does the Project expect the Stakeholder to provide?	Perceived attitudes and/or risks	Stakeholder Management Strategy	Responsibility
LLN (external)	No direct stake but may use findings to inform actions and raise awareness	Low	Share Information about their implementation approaches to ILP	LLN may not yet exist Unwilling to participate Lack of clarity about project aims/objectives	Involve in SG	Project Manager/ Director
Other JISC projects (external)	Common questions and themes  Share experiences and findings	Low	Share experiences and approaches	Useful information not available in time Unwillingness to share Unable to share due to different priorities	Monitoring of other project outputs,  Contacts	Project Manager  JISC Programme Manager

## 7. Risk Analysis

Risk	Likelihood (1 to 5)	Impact (1 to 5)	Score (L * I)	Risk Management Approach/Mitigating Actions	Early Warning Signs (caused by)
Retention of project officers	2	5	10	Motivation via contractual terms, good job design, good working environment & personal development.  Provide level of autonomy, self-determination and responsibility to maintain interest and challenge.	Low morale. Poor performance. Lack of interest and engagement with user groups. Poor team work.
Failure to get all parties to share same understanding of purpose	3	5	15	Definition of stakeholder needs and clear plan with well-defined deliverables. Use of sound project management methodology.	Lack of plan, workpackages, deliverables, use cases. Differing views on forward plan. Confused messages in draft publications.
Project Manager – lack of available time on project	2	5	10	Schedule regular time in diary, plan meetings, reports etc ahead	Late submission of plans and reports, work not completed on time for project meetings, late distribution of meeting agenda and minutes
Project Officers – difficulty in managing complex set of use cases	3	4	12	Maintain comprehensive list of use cases investigated; plan schedule of use cases carefully so each officer has balanced workload over life of project; monitor progress and report status of each use case regularly to identify any that are slipping.	Tasks for individual use cases missed, late or forgotten. Use cases lose momentum or participant buy-in; progress is uneven and sporadic.
Key institutional Contacts and Project Director – competing priorities leading to lack of input and support	3	5	15	Schedule regular meetings, maintain regular communication by email, blog etc	Lack of attendance at meetings, lack of contribution and participation/feedback on key project deliverables.
Difficulty in getting commitment from key institutional contacts – WP and community co-ordinators	2 to 4 (depends on institution)	5	10 to 20	Identify clear benefits to contacts in terms of meeting their goals (eg flexible delivery); emphasise support available from project; work with enthusiasts; ensure project institutional champions are engaged; focus on potential to	Lack of willingness to meet, attend meetings or discuss project. Contact liaisons are not provided. Use cases not identified or fall through. Unable to contact.

Risk	Likelihood (1 to 5)	Impact (1 to 5)	Score (L * I)	Risk Management Approach/Mitigating Actions	Early Warning Signs (caused by)
				be more productive/ skill staff.	
Difficulty in getting commitment and engagement from use case staff	4	5	20	Identify clear benefits to contacts in terms of meeting their goals (eg flexible delivery); emphasise support available from project; work with enthusiasts; ensure their line manager is supportive. Focus on potential to do job more effectively. Provide training, exemplars and ideas on potential of social software.	Lack of willingness to meet, attend meetings or discuss project. Contact liaisons not provided. Use cases not identified or fall through. Lack of enthusiasm, lack of interest, focus on problems, difficulties and challenges. Unable to contact.
Lack of engagement of schools, FE colleges and LEAs regarding ILPs	3	3	9	Approach a wide range of schools, colleges and LEAs to gather information. Focus on asking for information; policy and plans already available. Do environmental scan on what other regions are doing. Sample rather than exhaustive coverage of all potential institutions and LEAs (focus on Bradford and Leeds). ? need to cover all regional LEAs, eg Calderdale etc?	Can't establish contacts in any institutions/LEAs. Passed around within contact institution. Information promised but not delivered. Generally poor communication.
Unable to engage with regional LLN	3	2	6	Just recently set-up (based in Huddersfield Uni) with each HEI having a named contact – use these to establish credentials and make initial approach. *** Bradford contact has left institution – need to establish new contact	Can't find out or establish contact with ELP2 partner LLN reps. Reps won't engage in dialogue with project; won't facilitate introduction; support collaboration between ELP2 and LLN.
Project officers are unfamiliar with social software and services	3	5	15	Provide time and support for staff development, training and to develop expertise. Identify appropriate references, studies and resources. Seek advice and input from JISC support services, eg CETIS.	Unwillingness to use software, focus on a small number of social software types systems.
Project manager and institutional reps are similarly unfamiliar with social software	3	5	15	Provide time and support for staff development, training and to develop expertise. Identify appropriate references, studies and resources. Seek advice and input from JISC support services, eg CETIS.	Lack of input to discussion, inability to advise or comment on social software recommendations and choices.

Risk	Likelihood (1 to 5)	Impact (1 to 5)	Score (L * I)	Risk Management Approach/Mitigating Actions	Early Warning Signs (caused by)
Use case staff (organisers, tutors, supporters) don't have skills in use of social software	5	5	25	Project officers to develop training programme for staff, develop exemplars, engage staff in discussions about potential and application to particular and individual needs.  Use software to develop and support user group – get feedback, provide support	Fear expressed re use of technology in general and social software in particular. Lack of interest (inertia or opposition) and unwilling to engage in discussions. Comments regarding additional workload and lack of training.
Use case participants – learners and community members don't have skills in use of social software	3 to 5 depending on use case	3	9 to 15	Project officers to develop activity based training programme for learners, develop exemplars, and engage participants in discussions about potential and application to their particular and individual needs. Part of evaluation. Non-participation is valid choice at this level but we must be able to find out why.	Fear expressed re use of technology in general and social software in particular. Lack of interest (inertia or opposition) and unwilling to engage in discussions.  Comments regarding additional work; don't log on or use any of the social software services; don't participate in online activities.
Lack of contact with other JISC projects in programme	2	2	4	Identify areas for sharing/collaboration; notify JISC programme manager; attend programme meetings and development events.	Lack of response; slow response; information too little and too late to be implemented
Inappropriate choice of social software for use cases	3	4	12	Ensure project officers get appropriate training and have time to explore features of a range of social software – use recent Web 2.0 publication by JISC Technology watch to identify range of common services.	Social software selected does not provide facilities and features needed by users; it is difficult to use, learn, navigate; participants make use of other communication channels to complete learning activities.
Project Plan inaccurate	3	4	12	Quarterly review and update against progress; get feedback from institutional contact and project officers.	What project is actually doing does not match plan. Can't work out what we are actually doing.
Bradford restructure while project in progress - TQEG, lead partner and project management, has been relocated within Uni our of School which contains Bradford's WP	5	3	15	Makes relationships more remote. Keep in regular contact	Use cases don't actually start, or lose momentum; patch in progress.

Risk	Likelihood (1 to 5)	Impact (1 to 5)	Score (L * I)	Risk Management Approach/Mitigating Actions	Early Warning Signs (caused by)
initiative					
Bradford – new post holder due in July 07 – senior line manager for project	5	2	10	Keep informed, Get ELP2 project director to liaise	No interest expressed in project by senior manager; too much interest expressed in project by new senior manager; lack of support.
People who require retraining (team, use case managers and participants)	5	5	25	Ensure cascade model of development and training is implemented for and by project team	People can't find time for training; don't engage in training; passive resistance and inertia; attitude and how it affects other participants.
People who may be required to commit resources to the project (institutional contacts, use case managers)	4	4	16	Be clear about project aims and how these align and help them meet their aims and targets – emphasis on appropriateness, efficiency, flexible delivery, new and potentially more effective ways of engaging learners	Can't contact; slow to return calls/emails; identify lots of barriers and challenges; slow to identify groups; all initiation/drive comes from project.
People who will have to do their job in a different way (use case staff/ managers/ supporters)	5	5	25	Focus on benefits, alignment of aims and goals, ensure training and support are in place; many exemplars; get advocates from people in similar positions.	Can't contact; slow to return calls/emails; identify lots of barriers and challenges; slow to identify groups; all initiation/drive comes from project.
People who will have to carry out new or additional functions (all participants in use cases including manager, tutors and learners)	3	5	15	Ensuring that all questions and concerns are answered; provide evidence that it meets a need, achieves greater results, is more effective.	Participants don't engage in using software, technology or activities.
People who will have to use a new technology (all)	5	5	25	Try to embed and integrate use of technology with other activities of group, learning activities or community.	Participants don't engage in using software, technology or activities.
Unable to Interface/ integrate selected Social Software with	5	3	15	Identify relevant standards and services using JISC e-Framework, list possible areas of interoperability and integration or data transfer.	Institutional IT systems manager won't engage in dialogue. Can't map social software services available against e-Framework.

Risk	Likelihood (1 to 5)	Impact (1 to 5)	Score (L * I)	Risk Management Approach/Mitigating Actions	Early Warning Signs (caused by)
ELP2 partner institutional systems					
Unable to engage users and particularly non-users in evaluation (especially important if use cases do not engage user community to understand why)	3	5	15	Provide incentive to users to provide evaluation feedback; try to build in evaluation	Lack of user participation in use case; lack of response to evaluation questions or data collection approaches; lack of support from use case manager/organiser/supporter.
Project officers unable to undertake learner experience part of evaluation – lack of necessary skills	4	5	20	Provide appropriate training in methodology; review evaluation outputs from relevant JISC learner experience projects; review and exchange ideas etc with new e-learner experiences projects	Can't identify interviewees; inconsistency of approach and outputs. Poor collaboration and team approach.
Project not disseminated to range of audiences, ie beyond HE	3	4	12	Try to engage users in identifying appropriate range of channels and methods; get them involved in co-authoring and presenting.	No ongoing dissemination; lack of interest from users case managers/institutional contacts in joint dissemination and identifying appropriate channels.
Project focus number 3 – difficulty in engaging user groups	5	5	25	Identify appropriate contacts within ELP2 partners; cultivate good working relationships with them; work closely with partner contacts	Can't identify use cases; can't engage use case participants.
Use cases don't work/take-off	3	4	12	Ensure appropriate time is spent identifying their needs and mapping use of social software.	Lack of worth while activities for community; lack of participant engagement.

## 8. Standards

This project will be using existing Web 2.0 and social software services in its use cases. The focus of this aspect of the project will be on mapping the selected services against the JISC e-framework<sup>4</sup> (existing and identified domain maps) and identifying opportunities and barriers to interoperability with each other and with ELP2 partners' institutional systems.

## 9. Technical Development

The project will not be undertaking any technical development.

## 10. Intellectual Property Rights

The intellectual property rights of materials brought to and used in the project by the ELP2 partners or any participants will remain vested with the original copyright holder although the materials may be used within the project with the consent of the copyright holder.

The copyright of any materials developed as part of the project will comply with the JISC requirements<sup>5</sup>. The project partner responsible for creating the materials and/or deliverable will own and be responsible for the IPR and copyright but be freely available for other partners to use within the project and by agreement beyond the life of the project. These materials will be made available to the sector under a creative commons<sup>6</sup> licence. The project team consult the JISC, JISC programme manager or appropriate service (eg JISC Legal<sup>7</sup>) on this aspect.

IPR created by use case participants will be owned by them and the ELP2 project will obtain any releases by needed to enable us to use them in the project.

Currently no commercial partners are involved in this project.

## Project Resources

### 11. Project Partners

Partner	Role	Main contact
University of Bradford	Project Director	Professor Peter Hartley
	Project Manager <ul style="list-style-type: none"> <li>○ Overall project co-ordination</li> <li>○ Budget control and management</li> <li>○ Identify appropriate contacts for use cases within Bradford</li> </ul>	Carol Higgison
	Project Officer <ul style="list-style-type: none"> <li>○ identification of appropriate use cases linked to Leeds</li> <li>○ develop, implement and evaluate use cases across partners</li> </ul>	Neil Currant
University of Leeds	Institutional lead <ul style="list-style-type: none"> <li>○ identify appropriate contact for</li> </ul>	Andy Pellow

<sup>4</sup> [http://www.jisc.ac.uk/whatwedo/programmes/elearning\\_framework.aspx](http://www.jisc.ac.uk/whatwedo/programmes/elearning_framework.aspx)

<sup>5</sup> [http://www.jisc.ac.uk/fundingopportunities/proj\\_manuguide/projectplanning/intellectualproperty.aspx](http://www.jisc.ac.uk/fundingopportunities/proj_manuguide/projectplanning/intellectualproperty.aspx)

<sup>6</sup> [http://www.jisc.ac.uk/news/stories/2005/10/cie\\_creativecommons.aspx](http://www.jisc.ac.uk/news/stories/2005/10/cie_creativecommons.aspx)

<sup>7</sup> [http://www.jisc.ac.uk/whatwedo/services/as\\_jisclegal.aspx](http://www.jisc.ac.uk/whatwedo/services/as_jisclegal.aspx)

Partner	Role	Main contact
	use cases within Leeds Project Officer <ul style="list-style-type: none"> <li>○ identification of appropriate use cases linked to Leeds</li> <li>○ develop, implement and evaluate use cases across partners</li> </ul>	Christopher Murray
Leeds Metropolitan University	Institutional lead <ul style="list-style-type: none"> <li>○ identify appropriate contact for use cases within Leeds Met</li> </ul>	Jill Taylor

## 12. Project Management

The project reporting framework comprises three tiers, weekly management and reporting within the project team (manager and project officers); monthly project meetings and advisory steering group meetings.

### Weekly reporting

Day-to-day co-ordination is overseen by the Project Manager, in consultation with the Project Officers and lead contacts at the partner institutions. This is facilitated by a project blog to which the project officers post a weekly summary of their activities and plans for the coming week. In addition all members of the project team can post relevant items to the blog, eg summaries of meetings with use case stakeholders. The team can also share relevant resources and materials through a shared bookmarking service<sup>8</sup> which is linked into the project blog.

### Monthly project meetings

The project also holds regular monthly project meetings which include partner stakeholders beyond the immediate project team, eg in widening participation and community engagement. It meets monthly to review the ongoing progress of the project against the plan; the identification and development of new use cases and monitoring of progress of current use cases; agree shared strategies (eg evaluation, support materials), discuss progress and update work packages.

The project also has an advisory steering group that will be consulted at key points during the project. The project proposal suggests this group will meet six times during the project, but the more developed phased approach suggests that it will be more appropriate for this group to meet at key points in the project to consider forward direction and to comment and feedback on major project deliverables.

### Steering group

This will meet during the course of the project in order to:

- Monitor progress
- Ensure that the lessons learned in different parts of the project are shared across all partners
- Develop plans for continuing the work and the new partnerships created beyond the timespan of the JISC funding.

At a minimum the steering group will meet at the end of each phase of the project.

<sup>8</sup> Del.icio.us - <http://del.icio.us/elp2?296372>

## Project team and specific roles

University	Person	Role	Role in project	Contact
Bradford	Peter Hartley	Professor of Education Development,	Project Director	P.Hartley@bradford.ac.uk
	Carol Higgison	Senior Adviser on E-Learning	Project Manager	<a href="mailto:C.Higgison@bradford.ac.uk">C.Higgison@bradford.ac.uk</a> 0.5 day per week on project management
	Project officer	Neil Carrant	Main project contact	<a href="mailto:N.Carrant@bradford.ac.uk">N.Carrant@bradford.ac.uk</a>
Leeds	Andy Pellow	IT Manager, Leeds University School of Medicine	Institutional contact	<a href="mailto:A.Pellow@leeds.ac.uk">A.Pellow@leeds.ac.uk</a>
	Christopher Murray	Project Officer	Main project contact	<a href="mailto:C.Murray@leeds.ac.uk">C.Murray@leeds.ac.uk</a>
Leeds Metropolitan	Jill Taylor	Principal Lecturer and Teaching Fellow, Faculty of Health	Institutional Contact and Main project contact at Leeds Met	<a href="mailto:J.D.Taylor@leedsmet.ac.uk">J.D.Taylor@leedsmet.ac.uk</a>

### 13. Programme Support

The project would appreciate specific support in identification of a range of current and popular Web 2.0 and social software systems and training in their applications and use. ELP2 would also appreciate training or sharing opportunities in the areas of evaluation and dissemination.

### 14. Budget

The budget is unchanged from the original proposal – see Appendix A

## Detailed Project Planning

### 15. Workpackages

The project has been divided into three phases to allow scoping of the project use cases (identification of key questions, methods and processes); implementation of the use cases; and evaluation and project closure. The project will use a sliding planning window<sup>9</sup> approach to the development of work packages, as recommended by the JISC Infonet Infokit on Project Management<sup>10</sup>. Consequently the first few months of the project, Phase 1, will be spend scoping the project and as such detailed work packages will emerge from the scoping process.

See Appendix B for further details.

#### Work package 1: Create the project plan

**Objective:** agree the general scope and capture initial requirements, agree roles and responsibilities in the team and implement project communication tools, eg blog, shared resource bookmarks.

<sup>9</sup> or Rolling Wave approach

<http://www.jiscinfonet.ac.uk/InfoKits/project-management/pm-planning-1.1>

<sup>10</sup> <http://www.jiscinfonet.ac.uk/InfoKits/project-management>

**Start Date:** 1 Jan 2007. **Completion Date:** 30 March 2007

**Work package 2: Scope the project**

**Objective:** Identify and make contact with partners institutional WP and community engagement staff; brainstorm ideas for use cases in each project focus area; identify a set of pilot use cases and implement to identify key social software and web 2.0 technologies that might be appropriate and identify any issues; pilot use case processes and identify barriers and challenges.

**Start Date:** 1 Jan 2007. **Completion Date:** 31 August 2007

**Work package 3: Staff Training and development**

**Objective:** identify key training needs of project staff; arrange appropriate training; identify appropriate resources and allow time for practice and self-development and sharing of ideas. Identify potential training needs of use case participants and how these might be best be addressed.

**Start Date:** 1 Jan 2007. **Review Date:** 31 August 2007

**Work package 4: Project Evaluation 1**

**Objective:** to determine and pilot evaluation strategy during first phase of project and ensure team have common view and receive required training in learner centred qualitative approaches.

**Start Date:** 1 April 2007. **End Date** 20 Aug 2007

**16. Evaluation Plan**

The project undertake formative evaluation via the ongoing management processes including project officer reports and meetings where discussions and decisions will be documented. Similarly each use case will be formally evaluated and contribute to an ongoing and continuous evaluation of the project activities and their impact. All electronic communication will between project members will be captured via email, notes of informal meetings, minutes of meetings, and progress reports which will be collated via the project blog. All formal project documents, plans, reports and deliverables will be added to the blog or project web site as they are produced.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Phase 1	Selection of Social Software (per use case)	To what extent was the social software/web 2.0 tool appropriate to the use case.	Review of use – logs, actual use, ease of use. User questionnaire	User perception of success. Actual use Barriers to use
Phases 1 and 2	what prior experiences and uses of social software are students bringing	<ul style="list-style-type: none"> <li>o To what extent to participants have previous experience of social software</li> <li>o How and to what extent do they use them?</li> <li>o What are their perceptions of the use of systems they use?</li> <li>o</li> </ul>	Pre-questionnaire Focus groups	Base line measure Perceptions Attitude to external influences on their use of social software and web 2.0 may indicate potential for success or failure in use cases.
Phases 1, 2 and 3	How do learners' attitudes, behaviours and values affect their use, and willingness	<ul style="list-style-type: none"> <li>o Do they perceive these as private space</li> <li>o are they open to</li> </ul>	Questionnaires Focus groups Individual indepth	Elicitation of student perceptions, attitudes and values and how these influence their behaviours in their use

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
	to use, social software for formal (organised) learning.	using them for learning?	interviews with purposeful sample of successful learners	of social software. One learner experience from each use case.
	How social software and web-based tools enhance widening participation into higher education	<ul style="list-style-type: none"> <li>○ Does providing innovative ways of enabling learners to present learning outcomes and achievements in a digital format increase engagement, motivation and learning?</li> <li>○ Does creating/ supporting a range of user groups and communities increase motivation, engagement and learning?</li> </ul>	<p>Questionnaires</p> <p>Observation of student engagement with online services and activities</p> <p>Observation of student engagement in online communities</p> <p>Indepth interview with sample of learners</p>	<p>Identify factors which motivate students</p> <p>Establish extent to which these two factors (digital presentation and community participation) feature in student factors.</p> <p>Identifying how and when students engage successfully</p>
	Effectively apply social software to engage a broad range of learners and for their benefit of learners.	<ul style="list-style-type: none"> <li>○ What are the barriers to user engagement (practical, skills, confidence)?</li> <li>○ How do learners access these systems?</li> <li>○ Do learners perceive these systems as offering more flexible and accessible learning opportunities?</li> <li>○ How many are engaged in going onto HE.</li> </ul>		
	How social software can engage individual learners, increase motivation and support the development of lifelong learning skills.	<ul style="list-style-type: none"> <li>○ What are learners' perceptions of success?</li> <li>○ How do learners perceive their motivation, engagement and motivation</li> <li>○ How do learners perceive their lifelong learning skills</li> </ul>	In depth interviews with a purposeful sample of successful learners (one per use case)	Rich and detailed learner narratives

## 17. Quality Plan

Timing	Deliverable	QA Method(s)	Evidence of Compliance
Weekly	Progress reports from project officer	Reviewed by project manager	Comments as appropriate  Issues raised and discussed at project meetings  Project Blog
During project	Training programme for project team in use of social software	Review by project Team and Manager	Evaluation of appropriateness of selection of tools for use cases.
During project	Minutes of project meetings	Reviewed by project meeting	Project Blog
During project	Use cases published on project web site as they are completed	Review and sign off by Project manager and project team meeting  Signed off by SG as appropriate	Availability of use cases.
During project	Project Website	Review by Project Team  Review and sign off by SG	Web site available online.
End of project	JISC programme meetings and JISC dissemination events eg online conference, annual conference	Prepare papers/ presentations on project findings/ outcomes	Acceptance of paper/presentation at event
	JISC RSC (Yorkshire and Humber) dissemination events, eg conferences	Prepare papers/ presentations on project findings/ outcomes	Acceptance of paper/presentation at event
All phases	Use case implementations	Review and sign off by SG	Use cases
All phases	Project reports and evaluations	Review and sign off by SG	Sign off by JISC programme manager.
All phases	Project plan	Project Manager review progress against plan and report to SG  Regular progress reports to JISC	Updated/ revised plans and progress reports  Sign off by JISC programme manager.
All phases	Evaluation Plan	Project Manager review progress against plan and report to SG  Regular progress reports to JISC	Updated/ revised plans and progress reports  Sign off by JISC programme manager.
All phases	Dissemination plan	Project Manager review progress against plan and report to SG  Regular progress reports to JISC	Updated/ revised plans and progress reports  Sign off by JISC programme manager.

## 18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
From phase 1	Project Website	UK HE, FE and School staff	To explain project purpose and outcomes	Evaluation of the application of social software to WP
Throughout project	Meetings with key stakeholders (including Steering Group)	Regional and national organisations which have interests in student progression	To make contacts in relevant organisations	Evaluation of the application of social software to WP and community engagement
	Regional project meetings	Related projects	To share experience and learn from other projects	Sharing of experience and project progress
	JISC programme meetings and JISC annual and online conferences	General audience plus related projects	To share experience and learn from other projects	Sharing of experience and project progress
	JISC RSC (Yorkshire and Humber) Annual Conferences	Regional schools, FE, sixth form colleges, Universities etc.	To publicise and share experiences of project within the region.	Sharing of experiences and progress within the region.
	Conference submissions, eg HEA; ISL; ALT	UK HE staff interested in the application and evaluation of e-portfolios	To explain project purpose/ outcomes and receive feedback from other workers in this field	Evaluation of the application of e-portfolios to student progression

## 19. Exit and Sustainability Plans

### Exit Plan

Project Outputs	Action for Take-up & Embedding	Action for Exit
Social software use case implementations	All are planned for long-term implementation	Embedding in Partners normal activities
Project reports and evaluations	Published on website which will be maintained for up to 5 years	Used as basis for conference submissions and further development

### Sustainability Plan

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
Social software use cases	Planned as part of development of ongoing provision	Extend use of social software among target groups.	Usability Affordability Technical Interoperability
Evaluation Report on Learner experiences	Useful reference and evidence base for future studies	Part of growing literature and research on this aspect of e-learning.	How it is compatible with, complementary to and adds value to current and future research

<b>Project Outputs</b>	<b>Why Sustainable</b>	<b>Scenarios for Taking Forward</b>	<b>Issues to Address</b>
Report on regional ILP initiatives	National requirement and useful information for partners and other HEIs/regions dealing with student progression	How ILPs can feed into and integrate with University student information and learning systems	Standards, interoperability, service based approach, e-framework.

## **Appendix A – ELP2 Budget**

See attached spread sheet

## Appendix B ELP2 –Work Package

Here Month 1 is January 2007 - dates in WPs following revised to reflect actual position of each component.

This first draft of the project plan covers Phase I of the project which runs from 1 January to 31 August 2007

WORKPACKAGES	Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
		J A n 2	F e b 0	M a R 0	A p R 7	M a y	J u n	J u l	A u g	S e p	O c t	N o v	D e c	J a n 2	F e b 0	M a R 0	A p r 8	M a y	J u n	J u l	A u g	S e p	O c t	N o v	D e c
1: Planning																									
2: Define scope and use cases																									
3: Staff training and development																									
4: Project evaluation 1																									
Project																									

Members of Project Team:

CH - Carol Higgison

PH - Peter Hartley

NC - Neil Currant

CM - Christopher Murray

AP - Andy Pellow

JT - Jill Taylor

<b>Workpackage and activity</b>	<b>Earliest start date</b>	<b>Latest completion date</b>	<b>Outputs (clearly indicate deliverables &amp; reports in bold)</b>	<b>Milestone</b>	<b>Responsibility</b>
<b>WORKPACKAGE 1: Planning</b>  <b><i>Objective: To plan the project, establish the project team and communication processes</i></b>				WP Complete	
1. Produce initial project plan for phase I	Jan 07	Mar 07	<b>Project plan (Phase 1)</b>		CH/PH/JT/AP
2. Implement project blog	Jan 07	Mar 07	The project blog		NC
3. Build the project team and outline roles	Jan 07	Mar 07	Commitment of project team members to the project		All
4. Identify Stakeholders	Jan 07	Mar 07	<b>List of stakeholders</b>		CH/All
5. Produce plan for phase 2	Jul 07	Aug 07	<b>Project Plan (Phase 2)</b>		
<b>WORKPACKAGE 2: Define scope and capture initial requirements</b>  <b><i>Objective: To capture the most important or architecturally significant requirements, identify risks and define the scope of the development.</i></b>				WP Complete	
6. Identify potential use cases	Jan 07	Aug 07	<b>List of potential cases</b>		CH/JT/NC/CM
7. Define pilot use cases	Jan 07	Aug 07	<b>Pilot Use cases</b>		NC/CM
8. Develop and implement and evaluate pilot use cases	Feb 07	Aug 07	<b>Use case studies with evaluation on web site</b>		NC/CM
9. Identify risks	Mar 07	Aug 07	<b>Risk list</b>		VLW/CSR/GMC
10. Identify range of appropriate use cases for implementation phase	Apr 07	Aug 07	<b>Use case model Use cases Participants and Stakeholders</b>		NC/CM/CH (All)
11. Analysis - detail and prioritize use cases	Jul 07	Sept 07	Further described use cases and use case priorities		CH/NC/CM
12. Validate choices of social software selections	July 07	Sept 07	Social software functions mapped against use case requirements		GMC/CSR

<b>Workpackage and activity</b>	<b>Earliest start date</b>	<b>Latest completion date</b>	<b>Outputs (clearly indicate deliverables &amp; reports in bold)</b>	<b>Milestone</b>	<b>Responsibility</b>
<b>WORKPACKAGE 3: Staff training and development</b>  <b>Objective:</b> identify key training needs of project staff; arrange appropriate training; identify appropriate resources and allow time for practice and self-development and sharing of ideas. Identify potential training needs of use case participants and how these might be best be addressed.				WP Complete	
13. Review range of social software/web 2.0 technologies available and select those to be considered for use in project	Jan 07	Mar 07	List of social software/web 2.0		CH/CM/NC
14. Complete user training needs analysis and identify training needs of team relating to social software along with potential sources of training/development	Mar 07	Jun 08	Training needs and solutions		CH (all)
15. Undertake team training in understanding and using social software systems	Mar 07	May 08	Training sessions, training materials, relevant references, reviews and information		CH/(all)
<b>WORKPACKAGE 4: Project Evaluation 1</b>  <b>Objective:</b> to determine and pilot evaluation strategy during first phase of project and ensure team have common view and receive required training in learner centred qualitative approaches				WP Complete	
16. Review evaluation methodology used in ELP1 and determine appropriateness for ELP2	Mar 07	May 07	Draft evaluation framework for ELP2 with recommendation for changes (omissions, additions, changes)		CH
17. Determine any training requirements for project team resulting from revised framework and identify potential solutions	May 07	Aug 08	Training needs analysis Possible training/development opportunities and providers		CH
18. Arrange and run training	May 07	Aug 08	Training day		CH (all)

## Appendix C – ELP2 focii: Five areas of investigation

1. Impact of Individual Learning Plans (ILPs) on regional widening participation partnerships.
2. Impact of social software in extending the take-up of widening participation opportunities.
3. Establish and expand informal support networks.
4. Impact of social software on individual learners' engagement, motivation and lifelong learning skills.
5. A longitudinal evaluation of the experiences of ELP participants and their impact on learners' lifelong learning skills, attitudes and practices.

### ***Impact of Individual Learning Plans on regional WP partnerships***

The development of ILPs is a priority in local authority 14-19 Strategies and Action Plans, it also features in Education Development Plans and is a key priority in the preparation and implementation of children's services. ILPs are also crucial to the delivery of several of the Connexions West Yorkshire Strategic Objectives. The Tomlinson Report emphasised the central importance of ILPs in assisting students in mapping out their programmes of learning and pathways to further study and employment. The increasing flexibility at key stage 4 (KS4) and the broadening of choice post 16 means that young people will need a supporting framework within which to make choices and ensure progression in their learning. ILPs will help ensure that their learning needs are effectively met and appropriate relevant pathways are mapped. Most areas are rolling the ILPs out over the next 3 years, to ensure all young people entering KS4 have ILPs.

A key challenge is to ensure that young people have ownership of their learning plans. An implication of Every Child Matters is the importance of learners developing independent learning skills whilst also being effective social learners and contributors. ILPs therefore need to help young people assess their own progress as learners in the light of their teachers' and mentors' assessment and feedback. The framework should support learners in formulating appropriate objectives and targets for learning as well as mapping out some of their longer term aspirations.

This development presents significant challenges at a regional and national level with regards to lifelong learning. For example, each project partner is currently offering its own 'technological' e-support for WP and each school and college in the regional will be introducing e-support for ILPs by 2008. This presents considerable organisational, cultural and technological integration and interoperability (compatibility) challenges across the region.

As part of this project we intend to consult and work with our WP partners to identify how they are planning to support ILPs, the different solutions and approaches being put in place, and how these can integrate and interoperate with each other as well as with regional HE WP initiatives.

### ***Impact of social software on extending take-up of WP opportunities***

The ELP project explored the use of e-Portfolios in facilitating wider participation of 16 to 19 year olds in full-time education into HE. The ELP evaluation suggests that raising aspirations to enter HE must begin at an earlier stage than Year 12, and the FilePASS project evaluation suggests that non-traditional groups need to be specifically targeted. In this strand of ELP2 we seek to implement the lessons learned from ELP and extend these WP opportunities and support to other demographic groups including:

- Younger learners (13 to 16 year olds), particularly those at KS4 as outlined above,
- Excluded school pupils,
- Mature learners,
- Black minority ethnic learners,
- Learners from non-traditional routes, eg individual learners.

Many of these target learners will be familiar with, and already use, blogs and other forms of social software, which are less structured and more informal in nature and where ownership is more likely to be perceived by the learners as belonging to them. We want to find out which combination of e-portfolios, blogs and social software will encourage the students to engage with the widening participation activities and accept responsibility for managing their own learning and as a preparation for developing the skills required to support lifelong learning, eg self-analysis, reflective skills.

### ***Establish and expand informal support networks***

In addition to extending the e-support to a broader range of non-traditional learners we also intend to use these technologies to support informal regional networks of learners and to build a learner community to support, develop and sustain these widening participation partnerships. Although extremely successful, the current approaches of the ELP2 partners offer limited opportunities for participating learners to share their experiences with their peers within and beyond their own institution. These additional e-Learning tools will allow participants, and other stakeholders, to

- establish contact and exchange experiences with their peers from other years and other institutions beyond those facilitated by e-Portfolios,
- access informal e-mentoring networks for support,
- establish E-homework clubs to support achievement,
- build a growing resource of individual, class, school and regional achievements to motivate and inspire future groups of learners,
- build support communities to enable stakeholders to participate in support networks and communities,
- explore their potential to enable participants to establish contact with employers, Connexions, careers guidance providers, local IAG (Information, Advice and Guidance) networks for adults and contact with university departments.

The key characteristic of these networks is that they will be established and run by the learners and other stakeholders themselves to meet their identified needs and requirements and build the capacity of the regional community.

### ***Impact of social software on individual learners' engagement, motivation and lifelong learning skills***

An overarching theme of the project is evaluating the extent to which use of social software or Web 2.0 technologies engages learners and promotes active engagement in their own learning, improves their motivation and helps to develop their lifelong learning skills.

In this strand of the project we will be using an in-depth, qualitative analysis of individual journeys of successful learners, and their perception of the factors which have contributed to their success. Our approach will be based on purposive sampling of one or two successful learners from each use case and we will use learner centred methods as described in the JISC Learner Experiences of e-Learning guide on *Methods for evaluation the Learner experience of e-Learning* (JISC, April 2007).

### ***Longitudinal Evaluation of ELP outcomes and impact***

In this project we seek to extend the evaluation of the ELP outcomes by undertaking an ongoing, longitudinal evaluation of the experiences of ELP participants. By 2008, at least four cohorts of participants will have experienced the support developed under ELP. There is little published research looking at the long term impact of such initiatives on widening participation and its impact on participants developing the skills they will need for lifelong learning. In ELP2 will examine three aspects of the ELP project outcomes:

- The impact of undertaking PDP and using an e-Portfolio on ELP participants (and subsequent cohorts) who have transferred from School/FE into HE as they continue their learning journeys through their University courses. We will examine the impact on their attitudes, their learning and their ongoing lifelong learning.

- The impact of undertaking PDP and using an e-Portfolio on ELP participants (and subsequent cohorts) who have transferred from HE into workplace settings and continue their learning into professional life. We will examine the impact on their attitudes, their learning and their ongoing lifelong learning.
- The extent to which the ELP process have been embedded into the partner institutions widening participation initiatives.

## References

Anderson, P (2007) What is Web 2.0? Ideas, technologies and implications for education (TSW0701), JISC Techwatch, Feb 2007, available online at [http://www.jisc.ac.uk/whatwedo/services/services\\_techwatch/techwatch/techwatch\\_ic\\_reports\\_2005\\_published.aspx](http://www.jisc.ac.uk/whatwedo/services/services_techwatch/techwatch/techwatch_ic_reports_2005_published.aspx)