



JISC Project Plan

Overview of Project

1. Background

The Yorkshire & Humber East Lifelong Learning Network (YHELLN) consists of nine partner institutions and is focused on accelerating the development of a framework for progression embedded in institutions, with a particular emphasis on vocational learners and their learning pathways. The area is large geographically, contains relatively distributed population centres and has areas of high social deprivation, all of which impact upon physical mobility between institutions. In this highly distributed context, it is clear that ICT enabled systems can play a major role in supporting the development and delivery of a more efficient, personalised and seamless learner experience.

iCaboodle (ISPPS) provides an exemplar method of combining tested components in an innovative framework to augment the HEFCE priority area in the development of Lifelong Learning Networks.

iCaboodle (ISPPS) will provide a coherent, personalised and customisable cross-institutional space, supporting the location and organisation of a variety of materials and tools to support learning. These include (a) VLE based tools, (b) tools to facilitate the discovery and use of JISC resources, (c) tools to facilitate access to library based resources, (d) access to a variety of general information, including Information, Advice and Guidance (IAG) and support for employability and (e) social networking tools.

iCaboodle (ISPPS) will co-ordinate activity through a project manager reporting to a representative steering group drawn from YHELLN partners and with acknowledged authority. This group will meet no fewer than four times per year and will make extensive use of technology based conferencing solutions to augment face-to-face meetings. A consortium agreement will be put in place, building on the YHELLN Compact Agreement. A project working group (see heading 12) will meet on a monthly basis to undertake detailed planning and monitor progress against objectives and decide on any necessary adjustments to the project plan.

Scenario

Jordan started on an Applied Digital Media Foundation Degree course at Selby College over two years ago and made extensive use of many of the ICT applications available to her, taking advantage of the college's status as a Centre of Excellence. She lived some distance from the college and her employment sometimes meant she needed to stay in hotels when attending conferences. Accessing the college's VLE to submit her course work or contacting her tutor soon became a way of life and her e-portfolio was starting to look impressive.

Last year, Jordan began a specialist 'top up' programme at the University of Hull in Scarborough to study for an honours degree. Enrolment was 'a breeze' as she describes it, as many of her details passed seamlessly to the University based around her Unique Learner Number. When she accesses her own 'space' to keep in touch with friends and tutors through the university portal, her login recognises who she is and presents all the information she's interested in, including RSS feeds, as though she's reading an interactive daily newspaper, designed just for her. It looks almost identical to the interface she started using back at Selby College and all the information she accessed then is stored in an archive for her to search whenever she needs it, including her e-portfolio, which she's relieved she hasn't got to re-type.

2. Aims and Objectives

In common with many other Lifelong Learning Networks, YHELLN faces several technical and socio-political challenges in the delivery of ICT enabled services to its constituents. iCaboodle (ISPPS) addresses a number of critical challenges related to enabling a personalised experience for YHELLN participants. The project, based around an identity management solution, will implement a coherent view of the learner and other constituents. It will involve implementing a flexible framework for incorporating not only the delivery of personalised services, information and applications from institutions, built around that identity, but also the incorporation of elements of external services and content. The result will mean a more personalised experience for the learner, placing information and content management firmly under their control.

To enable this, iCaboodle ISPPS will validate a series of widely used and mature open-source software components in the context of a Lifelong Learning Network. This will contribute considerably to the availability of a wide range of tested tools for the community which are ready to use and reduce the extensive customisation required by deployments for this purpose.

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.>*

Our approach will involve an initial investigation into the nature of ICT systems in place at present and how well they are integrated within the range of institutions that make up the Yorkshire & Humber East Lifelong Learning Network. Our methodology will be based upon our experience over the last 6 months as a LLN and previously, through many years working in the FE/HE and guidance sectors implementing systems, processes and applications. We, therefore, understand the many challenges and issues connected with change management in this field and know there is no substitute for

carrying out face to face visits and managing direct consultation with clients and stakeholders who we will involve at an early stage in the project. The most effective way to bring about change is to ensure progress on the project is for individuals to take on a sense of ownership. Our strategy will encourage key personnel to become engaged and become convinced themselves of the need for change and action in order to embrace the proposals for implementing a web portal and the resulting benefits.

We recognise that the learner/user is at the centre of what we do and, therefore, would wish to involve them in helping us to reach conclusions and make recommendations concerning the proposals for Phase One. In collaboration with YHELLN and with the support of partner institutions, we would hope to run a series of focus groups that will enable us to gather data on user expectations and requirements.

The first stage of the project (WP2) will consist of identifying and making contact with all key clients and stakeholders, as well as stakeholder groups. This analysis following this benchmarking exercise will form a basis for our Statement of Requirements.

The criteria are likely to include the following:

- Accessibility (W3C compliance, Ergonomics)
- Personalised (Customisation, Learning Styles, Usability)
- Integration
- Sustainability
- Standards
- Ownership
- Security, Data protection
- Robustness
- Training requirements

After WP2 has been initiated the intention is to manage the other workpackages as shown in the diagram overleaf.

	C	<i>Report on attributes required for personalisation and their mapping to eduPerson.</i>
	D	<i>Implementation of YHELLN directory and service connectors to colleges</i>
	E	<i>Self service password management</i>
	F	<i>Investigation of ULN as a unique identifier</i>
WP6	Portal Framework	
	A	<i>Install and configure uPortal 2.6 with DLM</i>
	B	<i>Integrate with YHELLN directory for authentication and personalisation</i>
	C	<i>Ensure appropriate branding for portal content</i>
	D	<i>Investigation of implementation of FLUID to meet accessibility requirements in conjunction with TechDis</i>
WP7	Systems Integration	
	A	<i>VLE dashboard integration</i>
	B	<i>VLE single 'sign on' integration</i>
	C	<i>Investigate and report on social networking tools</i>
	D	<i>Simple and complex social networking integration</i>
WP8	Contents Management	
	A	<i>Configuration of CMS sites and users for colleges</i>
	B	<i>Training sessions for editors at each college</i>

5. Project Outcomes

The outcomes envisaged for the end of the project include:

- The embedding of a basic identity management system across a sub regional partnership enabling personalisation.
- The establishment of a multi-institutional web-based portal linking relevant resources and shared services together throughout the partnership to support learning.
- Deployment of a Content Management System enabling the management and aggregation of content within the Portal.
- A better understanding of the MIAP and the use of ULN across the partnership.
- Further elaboration, and/or provide additional validation of, Service Genres, Expressions and/or Usage Models for the eFramework, particularly in a trans-institutional context.

- Self service authentication mechanism installed
- uPortal 2.6 with DLM installed and configured
- VLE dashboard and single 'sign on' integrated

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 Map

Stakeholder	Interest / stake	Importance
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JISC	As this project's funding body, JISC has a need for the outputs of the project to be of high quality, and for the project to be deemed a success	HIGH
HEFCE (LLN initiative) YHELLN	Strong support is required from the YHELLN Partners in order to ensure the project develops and maintains a good reputation. YHELLN has a need for the outputs of the project to be of high quality, and for the project to be deemed a success	HIGH
University of Hull	As the lead partner of the project, the University of Hull has a need for the outputs of the project to be of high quality, and for the project to be deemed a success. In hosting the project the University has an expectation that the project will help inform the direction of future developments of portal systems	HIGH
Project Supporters	Project supporters have a need for the outputs of the project to be of high quality, and for the project to be deemed a success	MEDIUM
Users <ul style="list-style-type: none"> • HE Students, member institutions: FT/PT/young/mature/campus-based/work based/community based • HE Staff, member institutions: administrative/learning support/academic/management/outreach • 'Guest' users: employers/prospective learners/pre-HE practitioners 		MEDIUM
Sector Skills Councils Learning & Skills Council Connexions LLN National Forum Foundation Degree Forward JISC Community 14-19 Partnerships	Other bodies involved in the development of 'channels' and tools to support the Lifelong Learning community are expected to benefit from the project in the same way that JISC but have no financial stake in the success of the project.	LOW

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Staffing Failure to recruit staff	4	5	20	Minimise number of staff to be recruited. Ensure recruitment cycle begins as rapidly after project approved as possible. Ensure remuneration adequate to level of responsibility and expertise. Use specialist recruitment agency if necessary. Other staff seconded from other duties and additionally trained as triage solution.
Organisational	3	1	3	The YHELLN Directorate will work to

Non-engagement or withdrawal of one or more college partners				strengthen the relationship between partners across a range of strategic issues including e-systems. However, the withdrawal of a partner would not significantly diminish the value of the project overall.
Technical Underestimate difficulty of specific technical development	1	3	3	Close integration with OSS community effort to mobilise additional resource to bear on problem space. Involvement of Moodle specialist for this aspect of work (Moodlerooms)
External suppliers	1	2	2	Ensure the project draws on experiences within the communities involved as well as on the expertise of external suppliers, for the portal-VLE integration. Use trusted consultants for evaluation role.
Legal Non-engagement and signing of the <i>consortium agreement</i> of one or more college partners	3	1	3	The YHELLN Directorate will work to strengthen the relationship between partners across a range of strategic issues including e-systems. However, the withdrawal of a partner would not significantly diminish the value of the project overall.
Technical Difficulty integrating with college data sources for identity	3	5	15	Deploy Identity Management software based on open standards. Direct engagement with systems specialists at each partner college.
Organisational Project fails sufficiently to engage learner communities	3	4	12	Staff within YHELLN, particularly the Workstrand Manager (Learner Support), will ensure that the 'learner voice' is represented throughout the project, inclusive of the broad diversity (including geographic) of learners represented within the partnership.

8. Standards

Name of standard or specification	Version	Notes
LDAP	v2 and v3	Used by Sun Identity Management Software
eduPerson	200604	Standard for mapping attributes for a user profile
MIAP Unique Learner Number	n/a	Unique identifier for each student
J2EE	5	Java framework used by uPortal
XML/XSL	1.0/1.0	Used by uPortal and HyperContent
WCAG 1.0	1.0	W3C standard for accessibility
RSS	0.9-2.0	Used for simple VLE integration

9. Technical Development

The project will adopt some of the practices arising out of agile development methodologies such as DSDM. All development activity will be based on timeboxes: working with the originator of the request for development to ensure that the requirements of the activity are clearly defined and prioritised using MoSCoW. The timeboxes will last for a maximum of one

month ensuring that the activity remains closely aligned with the initial objectives and that outputs can be regularly reviewed.

Without the management of identity no form of personalisation - provided, adapted or adaptive - is possible. Information about an individual's identity, their roles and their affiliations is required to provide targeted information to a user in a personalised environment. This has been recognised by the University of Hull for some time and the institution is deploying the Identity Management suite from Sun Microsystems to fulfil this need. The University is implementing Sun's Identity Manager for provisioning and co-ordinating user identities and Sun's LDAP-based Enterprise Directory to store the user profile data required to enable personalisation. Sun's software is available free of charge under an open source licence and will be implemented centrally at the University of Hull to co-ordinate the required sharing of identity information within YHELLN. The Sun solution is both flexible and robust, providing a platform for integration across all the partners. The deployment of Sun's Identity Management software provides the necessary building blocks to construct the basic identity infrastructure required by the LLN, although this should also be seen as the first step towards membership of the UK Shibboleth Federation (such membership is outside the scope of ISPPS). The government's work on Managing Information Across Partners (MIAP) has specified the creation and issuing of a Unique Learner Number (ULN). This project will investigate the use of the ULN to provide a unique and universal identifier for everyone in YHELLN using systems and resources within YHELLN.

10. Intellectual Property Rights

The primary focus of iCaboodle (ISPPS) is the re-use and integration of software components. It is not intended to retain any IPR over the documentation detailing this, but the reverse; it will be made available under an appropriate Creative Commons licence. In the event of specific software outputs being produced by the project, they will be licensed under the Apache Licence Version 2.0. This is endorsed by the Open Source Initiative, <http://www.opensource.org>. It allows any commercial or non-commercial exploitation of the software and is widely recognized as being one the most liberal licences in circulation. Several OSS communities are currently converging around this licence. Full licence at: <http://www.apache.org/licenses/LICENSE-2.0>.

Project Resources

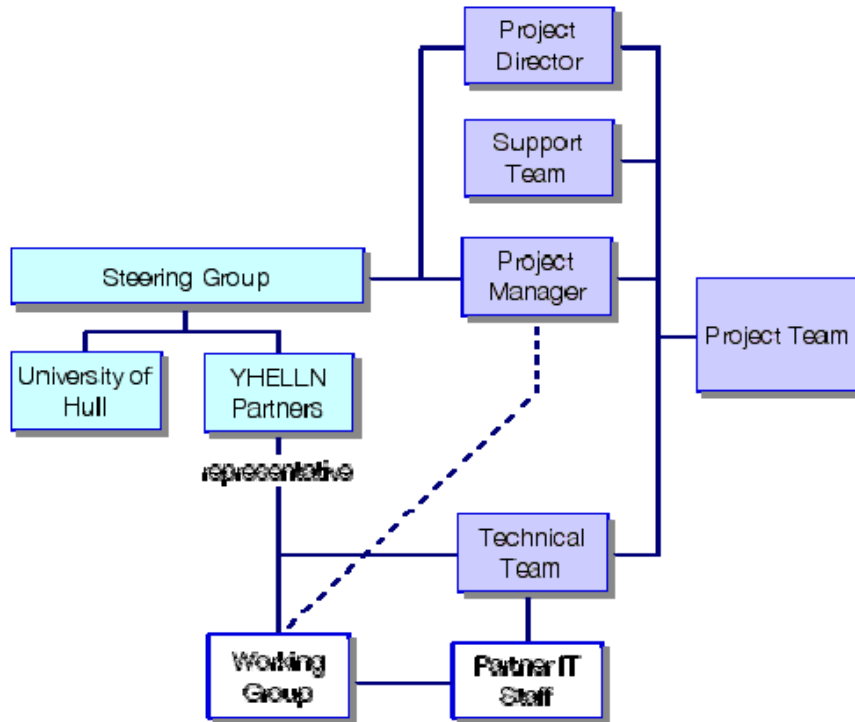
11. Project Partners

Partner	Role	Contact	Date
University of Hull			Lead
Yorkshire & Humber East Lifelong Learning Network			31 st January 2008
Bishop Burton College	YHELLN Champion	Christine Oates	31 st January 2008
Doncaster College	YHELLN Champion	Peter Hymans	31 st January 2008
East Riding College	YHELLN Champion	Gareth Sykes	31 st January 2008
Grimsby Institute	YHELLN Champion	Ellen Thinnesen	31 st January 2008
Hull College	YHELLN Champion	Julia Billaney	31 st January 2008
North Lindsey College	YHELLN Champion	Maxina Bulter-Holmes	31 st January 2008
Selby College	YHELLN Champion	Chris Munnings	31 st January 2008
Yorkshire Coast College	YHELLN Champion	Lynne Paxton	31 st January 2008
TechDis	Head of TechDis	Sal Cooke	N/A

A consortium agreement will be put in place as soon as possible (*envisaged to be 31st January 2008 – which is the next planned meeting of the group*) given the remit of the Steering Group - Glen J Jack (YHELLN) will be co-ordinating this process and will be building on the YHELLN Compact Agreement.

12. Project Management

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



WP1 Project management

iCaboodle (ISPPS) will co-ordinate activity through a project manager reporting to a representative steering group drawn from YHELLN partners and with acknowledged authority. This group will meet no fewer than four times per year and will make extensive use of technology based conferencing solutions to augment face-to-face meetings. A consortium agreement will be put in place as soon as possible given the remit of the Steering Group - Glen J Jack (YHELLN) will be co-ordinating this process and will be building on the YHELLN Compact Agreement. A project working group will meet on a monthly basis to undertake detailed planning and monitor progress against objectives and decide on adjustments to the project plan.

Name	Role	Contact details	% of time
Richard Heseltine	Project Director (Acting)	01482 465436 r.g.heseltine@hull.ac.uk	█
Ian Dolphin	Project Director	01482 466841 i.dolphin@hull.ac.uk	
David Sowden	Project Manager	01482 466630 d.sowden@hull.ac.uk	█
Robert Sherratt	Technical Liaison Officer	01482 466834	█

		<i>r.sherratt@hull.ac.uk</i>	
	<i>Identity Management Administrator</i>		██████
	<i>Portal and Systems Integrator</i>		██████
<i>Glen Jack</i>	<i>Management Accountant</i>	01482 465663 <i>g.jack@hull.ac.uk</i>	██████
	<i>Support Officer</i>		██████
<i>Andrew Chandler</i>	<i>Communications Manager</i>	01482 466656 <i>a.chandler@hull.ac.uk</i>	██████

13. Programme Support

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

Evaluation Framework Methodology
Quality Assurance Plan – (what level of detail is required?)

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

16. Evaluation Plan

In this section, we set out our overall approach and methodology to meeting the project requirements and a project plan for how we propose to deliver the evaluation. At the outset, it is worth noting that this is a *proposed* approach, and is presented to illustrate both our understanding of the key issues, and experience of conducting this type of evaluation.

To ensure ongoing monitoring of the project and reporting on outcomes, this work package (WP4) will run from the launch of the first pilot to project end, evaluating the experiences of educators, learners and institutions; both the University of Hull and other partners in YHELLN. Two phases of evaluation will take place during the project, aligning with identified stages of the pilots.

An independent consultant (CFE) will be employed to assist with the evaluation, whilst also providing a valuable external view on the project.

We believe this to be the most appropriate approach for an evaluation of this nature, as it will provide formative 'snap shots' of the project and its development over time. This approach will enable CFE to offer a series of recommendations at two distinct junctures across the lifespan of the project thereby adding significant value to the final outcome. We would incorporate a more summative dimension to the final evaluation.

CFE will complete reports based on the outcomes of each phase formative evaluations, in relation to:

- o the extent to which the project has achieved its aims, objectives and outcomes
- o the impact of the project has had on different groups of stakeholders in the short, medium and long-term
- o how lessons learned during the course of the project, including effective practice, are captured and disseminated both for the continuous development of the network, and to inform future developments in the geographic areas and/or the FE/HE sector.

To produce these reports, CFE will undertake a programme of scoping (through desk research), fieldwork (through surveys, telephone and face to face interviews, focus groups and meeting observation) concluding with analysis and reporting. CFE will also attend quarterly meetings with the project team.

Additionally, this work package will produce an analysis of the project and other reports identified by JISC, including a user requirements analysis and transferable models. Evaluation will also be supported by TechDis, who will provide accessibility expertise.

A reciprocal arrangement with Cumbria Higher Learning will overlay an additional level of evaluation around the wider strategic aims of learner-focused e-systems developments within a Lifelong Learning context, utilising the Lifelong Learning Networks' National Forum Peer Evaluation scheme.

Proposed plan as provided by CFE

Stage 1: Scoping and concepts

- o The project would begin with an inception meeting at which necessary briefing could be provided and details of the methodology agreed. At this meeting we will agree a clear schedule of milestones, against which we will review project progress, and establish the project requirements and preferences for reporting in the interim. Discussions would be held

at this meeting regarding how best to secure the full co-operation of full and associate members, target learners and other key stakeholders, to ensure that necessary evidence can be gathered in the required timescales.

Stage 2: Fieldwork

- Ahead of the fieldwork stage we would ensure that the aims and objectives of the evaluation were clearly articulated to all potential respondents.
- CFE would deploy the research technique or techniques most appropriate to the group under investigation. For example, depth face to face interviews are likely to be the most appropriate method of capturing the views of full members. The number of full members is relatively small, and it would be important to develop a detailed understanding of their views. With associate members and other stakeholders, it may be more appropriate to use telephone interviews, on the basis that they tend to be more cost-effective and can cover organisations that are more geographically dispersed.
- In the past, CFE have used focus groups to capture the views of target learners and employers. Focus groups will allow respondents to build on each others insights and prioritise the issues they have discussed. Prioritising the key issues will enable CFE to make highly relevant recommendations about how to improve the service for end users. This technique can complement the more traditional interview format and is a powerful way of capturing the dynamics and interplay between meeting attendees.

Stage 3: Reporting

- After the production of both initial reports, CFE will facilitate a workshop event to review the findings and to discuss development. This workshop will provide a timely and important opportunity to share and validate research findings and to inform the way forward.

Possible areas covered in the evaluation could be, though this will be developed through consultation with CFE and others involved. [REDACTED]

- *Quality*
- *Collaboration*
- *Ownership*
- *Vision/business plans*
- *Environment*
 - *External*
 - *Internal*
 - *Risks*
- *Processes*
 - *innovation*
- *Structure*
 - *existing*
- *Individuals/roles*
 - *SMY buy in*
 - *Learners etc*

- Staff – culture etc
- ID
- Technology
 - Resources – IPR
- Communications
- Training

1. Phase 1 evaluation of learners, tutors and institutional experiences
2. Phase 2 evaluation of learners, tutors and institutional experiences
3. Project evaluation report
4. Report on transferable models
5. Report on user needs and user interactions

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
	<i>Phase 1 evaluation of learners, tutors and institutional experiences</i>	How effective has the implementation of the ID Management system been?		
		What has the experience of the Learner and tutors been like?		
		How successful was the initial scoping with the user groups been, and how has this effected the SOR?		
	<i>Phase 2 evaluation of learners, tutors and institutional experiences</i>			
	<i>Project evaluation report</i>	To what extent has the project contributed to the e-Framework initiative?		
	<i>Report on transferable models</i>			
	<i>Report on user needs and user interactions</i>			
	<i>Stakeholder and Community Engagement</i>	Has there been the 'Buy in' that the project requires?	Online surveys, one-to-one, analysis of Portal use	Positive attitude towards the project.

17. Quality Plan

<Explain the quality assurance procedures you will put in place to ensure that project deliverables meet quality expectations and acceptance criteria. Complete the table below for each of the major

deliverables providing as much detail as possible. Repeat the table as many times as necessary to accommodate all deliverables.>

Introduction

This Quality Assurance Plan is intended to:

- o *Ensure that all steps of the project are monitored.*
- o *Ensure proper user acceptance criteria for each phase of the project.*
- o *Determine signoff procedures for various milestones.*

Output	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)

18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
22 nd Nov 07	National LLN e-systems Forum	LLN Staff Directors – Project Managers	Bring together LLNs interested in the use of Standards, and Collaborative development of e-systems	Collaboration
5 th Dec 07	YHELLN Web Portal Scoping Event	YHELLN Partners	Discuss Portal requirements -	Awareness raising and Collaboration
July / Aug 07	YHELLN Portal review 1	YHELLN Partners	Discuss Pilot 1	Review and evaluate
Jan 08	YHELLN Portal review 2	YHELLN Partners	Discuss Pilot 2	Review and evaluate
April 08	YHELLN Portal	YHELLN Partners LLNs	Disseminate the portal development	Implementation of the Project

It is envisaged that the project team would also disseminate the iCaboodle (ISPPS) project at relevant events nationally, regionally and sub-regional through events organised by other agencies, i.e. JISC, ALT, NILTA, LLNs, RDA etc.,

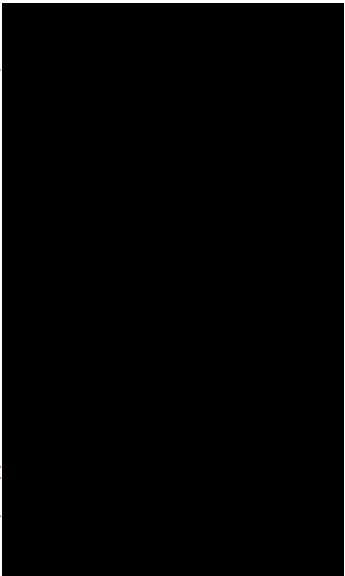
Engagement with the Community

ISPPS has the support of the YHELLN partnership and the Senior Management Team of the University of Hull. YHELLN is based upon a collaboration of HE delivery partners and associate members. It's an inclusive network and therefore involves broad representation from the learning and teaching community. The support for lifelong learning initiatives has been established in the form of a 'Compact', an agreement signed by all partners, which sets out their commitment to '...initiate developments for action in the sub-region' and 'to facilitate and broker links between partners through the support of initiatives...'. A major strength of the network is also the added value created through strategic accords developed between partner organisations.

19. Exit and Sustainability Plans

Sustainability

In the year following the conclusion of iCaboodle (ISPPS), the infrastructure resulting from the project will be integrated with the existing infrastructure at the University of Hull. YHELLN will support this transition with an allocation from existing budgets 'post project' to retain a dedicated Developer for a further 6 month period. YHELLN will also continue to fund the Project Manager for a period of at least 9 months. These remaining staff will be given the task of ensuring full integration with existing systems within the partner institutions and addressing any further staff development needs. YHELLN will also ensure the strategic deployment of its own funding to ensure that staff and learners across the member institutions are incentivised to make use of the portal. They will also provide additional dissemination throughout the HE Community in partnership with JISC, including via the LLN National Forum, which has a sub-group on e-systems in which YHELLN plays a major role. By project conclusion +12 months, the ISPPS portal infrastructure will be integrated with the existing University portal technical infrastructure.



Project Outputs	Action for Take-up & Embedding
ID Management	This will work within the Portal Framework and as such the systems will be embedded into the partners MIS systems
Portal Framework	YHELLN will underwrite the operation of the portal until December 2009, it is envisaged that the partners will then take on the embedding of the systems within their own software systems Further network development and collaborative work on e-systems and the required 'channels' is expected. With the work on the iCaboodle (ISPPS) project used as an exemplar.

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
Portal Framework	'Buy in' from the partner institutions, because the portal fulfils and addresses a need	Required by the whole YHELLN community to achieve the aims of LLNs.	
ID Management	As above	As above	

Appendixes

Appendix A. Project Budget

Appendix B. Workpackages