



JISC Project Plan: EPICS-2

Overview of Project

1. Background

This project builds on the considerable success of the first EPICS regional ePortfolio project (<http://www.epics.ac.uk>) which was funded as part of the JISC 07/04 Distributed eLearning Programme (DeL). EPICS spanned technology, pedagogy and governance related to ePortfolios to support personal development planning (PDP) and case studies to develop and model the transfer of life-long learning data between institutions.

EPICS-2 addresses sector wide and local requirements to support for personalised, work-based, and life-long learning,

2. Aims and Objectives

EPICS-2 aims to make a significant impact on the development of support for personalised learning, work-based learning, and life-long learning. Specific aims and objectives are:

- 1. Developing expertise and capacity through partnership and collaboration:** to support the uptake and effective use of PDP/ePortfolios across the region by:
 - Building on the established Regional Forum, the project will fund new activities focussed on support for the aims and objectives of this project. The Forum, open to membership beyond the project partners, will continue to be an effective vehicle for the sharing of good practice and contributing to the development and implementation of PDP/ePortfolios across the region
 - Recruiting further subject areas in each of the existing partner sites
 - Engage with new partners from FE and other sectors, as possible and appropriate (rate dependent on their priorities, affiliations, pedagogies, processes and technologies)
- 2. Develop and improve support for personalised learning and work-based learning by:**
 - Large-scale pilots to evaluate the use of ePortfolio to support personalised learning pathways, including use and extension of software developed in previous JISC projects
 - Undertaking a review of technologies and associated pedagogy used to support Work-Based Learning in the North East, to share and promote good practice regionally and nationally
 - Large-scale pilots of the use of ePortfolios, Blogs and Social Networking to support learning and PDP
- 3. Supporting mobility and life-long learning by:**
 - Embedding personal learning with mobile technologies, including the development of mobile portfolio/ blogging with asynchronous connection to Web-based portfolios, to complement existing work with mobiles undertaken by *CETL4HealthNE* (using synchronous Wifi connection to online portfolios)

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- Embedding the transfer of real data from undergraduate to postgraduate ePortfolio using methodologies developed in the first EPICS project (learning lessons from transfer of real data)
- Transferring real ePortfolio data between FE and HE, and working with the JISC ComPort projects
- Producing ePortfolio exemplars using 2 or more identity management systems (OpenID, Liberty Alliance, Shibboleth/CAS), complementary to other identity management initiatives planned in the region
- Engaging with emerging specifications and standards to facilitate the robust and efficient flow of ePortfolio and PDP data between institutions, including participating in the JISC-CETIS Portfolio SIG - development work will support the IMS ePortfolio standard

4. Evaluating the impact of the project by evaluating:

- the impact of ePortfolios and PDP in the region with new partners
- the efficacy of ePortfolios in new areas (personalised learning pathways, blogs, WBL etc.)

5. Maximising the impact of the project by: documenting and disseminating the outcomes and evaluation of the project, and engaging with other high impact projects within the region and wider:

- Developing and delivering a detailed dissemination strategy (in conjunction with other funded projects and the JISC) which will include workshops with the partner sites (embedding), and wider audiences (understanding/awareness) within and beyond the region
- Making an updated version of the ePET portfolio⁹ freely available to the JISC community, and providing guidance on different levels of ePortfolio implementation (i.e. 'lessons from our journey so far')
- Adding value to institutional and other initiatives (including CETLs) in the region by ensuring that this project complements institutional requirements

3. Overall Approach

The project is divided into a number of Work Packages and Case Studies (see Section 12 below) which are designed to meet the aims and objectives of the project. Each of these has a nominated lead who will be responsible to deliver the WP, working in conjunction with other members of the project team. Overall co-ordination will be provided by the Project Manager and the Project Working Group under the overall direction of the Project Director.

4. Project Outputs

- Web site with project resources (<http://www.epics.ac.uk>)
- Case Studies with reports:
 - CS1: ePortfolios to support personalised learning pathways in Combined Studies
 - CS2: Piloting of ePortfolio/Blogs with Nursing Students
 - CS3: Blogs & community publishing to support WBL in Speech & Language Sciences
 - CS4: Personalised learning pathways for Postgraduate Students in a regional context
 - CS5: Transfer of portfolio data in HE from undergraduate to Postgraduate
 - CS6: Inter-institutional transfer of ePortfolio data between FE and HE
 - CS7: Mobile learning – to support use of portfolios in WBL
- Regional Forum Events (5) with reports on the Project Website
- Report on technologies and associated pedagogy to support WBL (WP4)

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- Regional information solution to support personalised learning for postgraduate students & Web Service specification for importing training record into portfolio (WP6)
- Exemplars of ePortfolio using different identity management standards, short report (WP7)
- Updated version of ePET available to FE/HE community (WP11)
- Final Project Report

5. Project Outcomes

As well as the outputs (above) the activities of the project are intended to have a lasting impact:

Impact on Personalised, work-based and Life-long Learning

The project will help develop and improve support for personalised learning and work-based learning through the large-scale pilots and the review of technologies and associated pedagogy used to support Work-Based Learning in the North East.

Regional Impact

Individual partner institutions will be impacted through the projects shared regional approach (expertise + implementation). Also, the project will share good practice and will help further develop expertise and capacity through the collaborative Region Forum, which will be open to a broader audience than the immediate project partners. EPICS-2 also intends to add value by complementing institutional and other regional initiatives (including CETLs) in the region.

National impact

The technical and pedagogic work of EPICS-2 will be of national interest. In particular the Case Studies will be of wider applicability and will inform the emerging use of national and international standards. An updated version of the ePET portfolio will be made freely available to the JISC community.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
Students	ePortfolio/PDP to support learning	High
Institutions HEIs(5) & FE partners	Project Partners 1.2 FTE posts at Newcastle 0.5 FTE post at Durham +individual input of working group members and others	High
JISC / HEFCE	National / funders	High
CETL4HealthNE	Interest in WBL & Mobile Technologies	High
JISC RSC Northern	Regional	High
HE Academy / CRA		High
North East Collaboration Group for Researcher Development	WP5	High
RCUK	Postgraduate Training (WP5)	High

Unis4NE	Regional	Medium
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7. Risk Analysis

Risk	Prob. (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk [Mitigation]
Organisational (number of partners)	2	3	6	<ul style="list-style-type: none"> WP1 includes additional consultation with stakeholders to further ensure buy-in and shared vision (lesson from first EPICS project). Partners have more defined roles in the bid compared to previous project (esp. WPs 2, 4, 5 & 9). <p>Mitigation: partners developed strong mutual awareness and understanding during the first EPICS project.</p>
Project Management (adequacy of resourcing)	3	2	6	<ul style="list-style-type: none"> As well as significant PM experience the identified Project Manager (SC) works full time on ePortfolios. Project partners will significantly contribute to management of specific work packages (esp. WPs 2, 3, 5 & 9). The PM will contribute according to the demands of the project (e.g. during the busy project planning/initiation stage). <p>Mitigation: If the overall PM time should exceed 0.2 FTE then this will be provided as an institutional contribution.</p>
Staff (loss of Project officers)	2	2	4	<p>Mitigation: key staff already in post and with strong experience of ePortfolios. There are 3 developers specialising in ePortfolios supported by a wider team in FMSC. The project could potentially be delivered even with the loss of a Project Officer.</p>
Time scale of pilots (some case studies start at beginning of academic year, 2007)	2	2	4	<ul style="list-style-type: none"> Programme Directors already on board. FMSC development team will 'front-load' time to ensure pilots begin on time. <p>Mitigation: Technical infrastructure already in place.</p>

Nb. scores do not take mitigating factors into account.

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8. Standards

Name of standard or specification	Version	Notes
IMS ePortfolio	1.0	http://www.imsglobal.org/ep
LEAP	2.0	http://wiki.cetis.ac.uk/LEAP_2.0
EUROPASS-CV	1.0+	http://europass.cedefop.europa.eu/europass
HR-XML	2.x	http://www.hr-xml.org/

9. Technical Development

The project team includes experienced developers and will work to achieve high levels of usability and accessibility. The developments will use national standards and specifications where appropriate and will help inform the community which are developing these. The project will be including development of asynchronous solutions for accessing ePortfolios using mobile devices, this is being undertaken building on findings from work with mobile technologies through CETL4HealthNE. This previous work concentrated on synchronous access but has been limited to locations with established wireless networks.

10. Intellectual Property Rights

The project will develop a Consortium agreement. In addition, the IPR developed within the project will be governed, like other existing projects, within the NorMAN consortium agreement, with input from the institutional contract advisors. All outputs of the project will be provided for free to the education sector in the UK (within legal limitations e.g. data protection)¹.

The project will ensure dissemination at several levels: awareness; understanding and embedding. Dissemination (WP2, WP10) within the partner sites is of primary importance, with focus expanding from regional to national/international during the project life-cycle. Regional dissemination to promote awareness and engagement will be important from the onset, particularly for the successful delivery of WP2 (Partnership and collaboration). This will utilise both existing communication channels and networks of personal and institutional contacts to cascade information throughout the region.

Project Resources

11. Project Partners

Newcastle University (lead)
Durham University
Northumbria University
University of Sunderland
University of Teesside
Gateshead College /Falcon FE College Consortium
CETL4HealthNE

¹ Using either Public Domain –not copyrighted– or Creative Commons creativecommons.org/worldwide/uk/ as appropriate
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12. Project Management

The Core Project Team

Geoff Hammond (Project Director)
Simon Cotterill (Project Manager, [REDACTED])
Paul Horner (Project Officer, [REDACTED])
Martin Edney, (Project Officer, [REDACTED])
Paul Drummond
Sue Gill
Dr Lowry McComb
Dr Tony McDonald
John Moss
Dr Diane Nutt
Andrew Robson
Dr Alison Steven
John Snowdon
Jamie Thompson
Dave Webster

Beyond the core team there are many other individuals who will be contributing to specific case-studies and activities.

Work Packages and Leads

The project is divided into a number of Work Packages (see below). Each of these has a nominated lead who will be responsible to deliver the WP, working in conjunction with other members of the project team. Overall co-ordination will be provided by the Project Manager and the Project Working Group.

#	Title	Lead
WP1	Setup and management of project	Geoff Hammond
WP2	Developing expertise and capacity through partnership and collaboration	Jamie Thompson
WP3	Large-scale pilots of ePortfolios, blogs and social publishing	Simon Cotterill
WP4	Review of technologies and associated pedagogy used to support Work-Based Learning	Jamie Thompson
WP5	Supporting personalised learning pathways for Postgraduate Students in a regional context	Lowry McComb
WP6	Supporting life-long learning	Paul Horner
WP7	Identity management exemplars	Tony McDonald
WP8	Personalised learning environments – Mobile technologies	Paul Horner
WP9	Evaluation	Simon Cotterill
WP10	Dissemination and documentation	Sue Gill
WP11	Updated version of ePET available to FE/HE community	Paul Horner

13. Programme Support

We would appreciate help with timely information about JISC events, dissemination and opportunities for complementary funding. Ongoing advice on legal and data protection issues would also be very

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helpful. Support from the JISC RSC Northern will also be requested in relation to dissemination and engagement.

14. Budget

Directly Incurred Staff	Apr07- Mar08	Apr08- Mar09	Total
Project Director: Professor GR Hammond			
Project Manager, Newcastle			
Project Officer, Newcastle			
Systems Support, Newcastle			
Educational Researcher, Newcastle			
Project Officer, Durham			
Total Directly Incurred Staff (A)	£44,595	£70,077	£114,672
Non-Staff	Apr07- Mar08	Apr08- Mar09	Total
Contribution to partner costs (Northumbria)	£1,945	£3,055	£5,000
Contribution to partner costs (Teesside)	£1,945	£3,055	£5,000
Contribution to partner costs (Sunderland)	£1,945	£3,055	£5,000
Contribution to partner costs (Gateshead, JISC ComPort Project)	£1,945	£3,055	£5,000
Travel and expenses (conferences and JISC events)	£973	£1,527	£2,500
ePortfolio Server (will host all portfolios for project)	£3,000	£0	£3,000
Handheld Devices for Mobile ePortfolio Implementation (35 devices)**	£12,250	£0	£12,250
Setup and Connection to Trust and University Internet (35 devices)**	£5,600	£0	£5,600
Licensing for asynchronous database software for use with handheld devices	£8,000	£0	£8,000
Dissemination (5 regional forum events, 1 national event)	£1,945	£3,055	£5,000
Total Directly Incurred Non-Staff (B)	£21,918	£34,432	£56,350
Directly Incurred Total (A+B) (C)	£66,513	£104,509	£171,022
Directly Allocated	Apr07- Mar08	Apr08- Mar09	Total
Staff	£0	£0	£0
Estates	£6,682	£10,498	£17,180
Other (secretarial support, telephony, consumables, networks)	£934	£1,470	£2,404
Directly Allocated Total (D)	£7,616	£11,968	£19,584
Indirect Costs (E)	£31,196	£49,022	£80,218
Total Project Cost (C+D+E)	£105,325	£165,499	£270,824
Amount Requested from JISC	£65,064	£130,294	£195,358
Institutional Contributions	£40,256	£35,210	£75,466
Percentage Contributions over the life of the project	JISC	Partners	Total
	72%	28%	100%

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Detailed Institutional Contributions

Directly Incurred Staff	Apr07- Mar08	Apr08- Mar09	Total
Project Director: Professor GR Hammond [REDACTED] [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Directly Incurred Non Staff			
Handheld Devices for Mobile ePortfolio Implementation (35 devices)**	£12,250	£0	£12,250
Setup and Connection to Trust and University Internet (35 devices)**	£5,600	£0	£5,600
Directly Allocated			
Staff, Estates etc.***	£3,341	£5,249	£8,590
Indirect Costs			
Indirect Costs***	£15,375	£24,161	£39,536
Total Institutional Contributions	£40,256	£35,210	£75,466

Contribution to partner costs are allocations against which institutions can bill for staff time used in the project

* Durham University has agreed to waive all overheads associated with post

** CETL4HealthNE will fund this aspect of the project as it is in line with their own ePortfolio interests

*** Newcastle University has agreed to waive 50% of FEC costs

Detailed Project Planning

The project timetable is included overleaf. Further details of the Work Packages and case studies are included in Appendix A.

The delayed start of the project (formal confirmation of funding on 27th September 2007, following a consultation process with JISC) has resulted in some minor changes to the project plan. This includes delays to the start of CS1 & CS2. Resource has had to be concentrated on getting the case studies up and running in order to avoid the risk of pilots not being able to begin in the 2007/8 academic year.

16. Evaluation Plan

The evaluation will be broad-ranging some of the key areas are shown in the table below. However, based on our experience in the previous EPICS project there is need to have a flexible approach to evaluation, depending on how the project unfolds. Also, in the previous project the Regional Forum played a role as a 'critical friend' in previous project, raising questions to evaluate.

To maximise the impact of the project the evaluation of the larger pilots will require a more 'research' focussed case study methodology, with hypothesis testing and generation; (e.g. Yin, 2003²) and investigating the success of 'normalising' ePortfolios into everyday 'learning' practice.³ One or more of the pilots will also link with the national 'ELLI in HE' research project⁴ being led by Jamie Thompson and involving many of the EPICS partners. The project has budgeted for 15 days of an educational researcher – this resource will be targeted for focus groups and analysis of one or more of the CS1, CS2 or CS3.

Questions to address (not exclusive):

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Jan 09 +ongoing capture of information	Overall project	Did the project deliver its intended outputs? Did the project achieve its aims? What was the project's impact? What lessons were learned? Did the partnership work well?	Stakeholder questionnaire / interviews Evaluation of Forum Events	Quantitative and qualitative results
Jan-June 08	CS1	Can ePortfolio support personalised learning?	Questionnaire Focus groups / interviews	Quantitative and qualitative results
Feb-June 08	CS2	Can ePortfolio / blogs support learning? What are overseas students uptake and perception of ePortfolio?	Questionnaire Focus groups / interviews	-continued use after project
Jan-June 08	CS3	Can ePortfolio / blogs support learning and assessment?		
Dec 08- Jan 09	CS4	Can federated support tools support personalised learning in a regional context?	Stakeholder questionnaires / interviews	Quantitative and qualitative results -continued use after project
June-08	CS5 / CS6	Can students' data be transferred between ePortfolio systems at	Technical	Successful transfer of data

² Yin, R.K. (2003). Case Study Research - Design and Methods (3 edition), Applied Social Research Methods Series Volume 5, Sage Publications.

³ For example see: May C (2006) A rational model for assessing and evaluating complex interventions in health care. BMC Health Services research 6,86

⁴ For details of ELLI see: Effective Lifelong Learning Inventory - ELLI Online. <http://www.ellionline.co.uk/>

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		key transition points?		
Jan 09	CS7	Can a solution for successful asynchronos mobile connection to ePortfolios be developed	Technical Stakeholder interviews	Did it work? Was the model developed useful for stakeholders?

In addition to the above, individual Work packages will also have their own evaluation activities, with overall co-ordination by the Project Manager.

17. Quality Plan

QA will be delegated to individual work packages but with overall monitoring by the Project Manager and regular Working Group meetings. The Advisory Group will also play a role in QA. The QA methods needs to remain flexible depending on the methods and activities of the Working Packages.

18. Dissemination Plan

The Project will develop a detailed dissemination strategy (in conjunction with other funded projects and the JISC). This will include:

Workshops with the partner sites (embedding) and wider audiences (understanding/awareness) within and outside the region; focus groups; documentation which will be presented in a 'handbook' of good practice, solutions, and a series of case studies (based on the use cases outlined above)

Further develop the EPICS Website <http://www.epics.ac.uk> to disseminate the activities and outcomes of this project.

National conference – involving the HE Academy Subject Centre for Medicine, Dentistry and Veterinary Science

Opportunistic dissemination (when attending conferences and meetings for other purposes).

Timing	Dissemination Activity	Audience	Purpose*	Key Message
Ongoing	Project website	National	information, understanding, engagement	Ongoing activities and outputs of the project
Feb - Dec 2008	Regional Forum Meetings	Regional	engagement and buy-in	2 way information
Jan/Feb 2009	National meeting	Regional & national	Information, understanding	Project lessons and achievements

* in practice more dissemination activities are multi-purpose.

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19. Exit and Sustainability Plans

Partnership, knowledge and expertise

The partners view ePortfolio, PDP and life-long learning as core areas of their business, and are committed to sustaining effort in these key areas. The continuing relationships between the groups, long after first EPICS project funding ceased, evidences the willingness of the partners to cooperate and collaborate in the longer-term, and this is further evidenced by contributions to the project from CETL4HealthNE, an umbrella organisation representing all five universities in the North East. Servers from this project will be maintained for a minimum of two years after the end date and the infrastructure related to the project will be left in place and maintained by the partners who are committed to regional partnerships as exemplified by the CETL4HealthNE project, NorMAN network and Unis4NE.

Technical outputs

At the end of this project the partners will have in place systems transferring real student data between institutions, building upon the successes of the first EPICS project.

The ePET ePortfolio will be made available to the JISC community.

The postgraduate regional hub will, as far as possible, be developed using a federated model that links into existing systems, rather than a stand alone 'super system' which might be less sustainable.

Project Outputs	Action for Take-up & Embedding	Action for Exit
ePortfolio use by programmes in the Case Studies	Evaluation of effectiveness, embedding in the curriculum	Decision by Curriculum Officers

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
Regional Postgraduate Hub	Ongoing requirement	Federated regional service +national interest	Buy-in of key stakeholders
Mobile solutions	Perceived ongoing requirement	Larger pilots / roll-out	Funding

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Appendixes

Appendix A. Workpackages and Case Studies

Work Packages and their Deliverables

The Work Packages will help address the pedagogic aims of the project (as described above):

WP1: Setup and management of project

Leads: Geoff Hammond

To ensure impact EPICS-2 will build on the excellent infrastructure (such as the PDP Forum and online collaboration) from EPICS. The project will begin with a review of project plan and additional consultation with stakeholders. Drawing on experience from the EPICS project we recognise the importance of reviewing the project plan and engaging in wider consultation with stakeholders early in the project. The review and consultation process will serve 4 main purposes;

- to refine the plan agreed with the existing stakeholders;
- to engage with potential new partners and other stakeholders within the region;
- to refine existing and identify other potential case studies and,
- to ensure alignment of technology, pedagogy, governance and evaluation

We will then complete the preparation of the final detailed project plan in accordance with JISC requirements. The process will also establish terms of reference for the collaboration, staffing and advisory, reporting structures and timetable for meetings.

Deliverables: project plan

WP2: Developing expertise and capacity through partnership and collaboration

Leads: Jamie Thompson (Northumbria), Sue Gill (Newcastle), Dianne Nutt (Teesside)

The establishing of a Regional Forum has been a major outcome of the first EPICS project. The Forum has drawn together representatives from the partner institutions interested in PDP and portfolio learning. As a community of practice the Forum provides a space to share good practice and develop new ideas and approaches. The scope of the review will include e-assessment of WBL.

This work package will support 5 themed workshops which will both contribute to the other activities of the project and also act as a vehicle for dissemination (for information, and for engagement of new and existing partners).

Reports from the Forum activities will be disseminated on project Website.

Deliverables: 5 Forum meetings, short reports on themes based on outcomes of the events.

WP3: Large-scale pilots of ePortfolios, blogs and social publishing

Leads: Simon Cotterill, Paul Horner, Dave Webster

There will be a modest amount of development to extend ePET's support for personally specified learning outcomes (currently focussed on programme-level outcomes in some parts of the portfolio).

Deliverables: Case studies: CS1, CS2, CS3

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WP4. Review of technologies and associated pedagogy used to support Work-Based Learning

Leads: Jamie Thompson, Sue Gill

The review will be led by Jamie Thompson who is a member of the Work Related Learning Enhancement Group at Northumbria University. It will examine the range of technologies and associated pedagogy used to support work-based learning in the region. The review will elicit input from regional partners and stakeholders, including the Work Related Learning Service at Northumbria, the Practice Based Learning Working Group of CETL4HealthNE, and the JISC ComPort project.

There will be Regional Forum event around the theme of Approaches to Work-based Learning which will contribute to this activity.

The report will be published on the project Website. This will help share and promote good practice regionally and nationally.

Deliverables: Report on technologies and associated pedagogy to support WBL; conference paper

WP5: Supporting personalised learning pathways for Postgraduate Students in a regional context

Leads: Lowry McComb (Durham), Simon Cotterill (Newcastle)

This will be an extensive piece of work building on existing regional collaboration⁵ and on established use of ePortfolios and related systems in order to enhance personalised learning pathways for postgraduate students in the region. The deliverables will potentially help address issues of availability for part-time and distance postgraduates, who may not be able to easily access courses at their home institution, and the provision of a wider range of opportunities at all institutions. The work will be of national interest.

The first stage will include extending linkage between an established University-wide postgraduate ePortfolio at Newcastle and a workshop administrative system. This work will generate a Web Service specification for importing training record into ePortfolio that can be adopted and applied to other systems along with a specification for sharing workshop details (probably RSS with extensions).

The second stage will be to develop a regional information hub (portal) to support postgraduate training. This will utilise the specifications from the first stage, which may be refined after discussion with regional partners. The portal will draw information from local systems to provide a centralised menu of PGR training opportunities across the region and where appropriate transfer attendance information to students' training records at their home institution (CS5).

The evaluation will include examination of the processes in developing the solution(s) in a federated system with multiple stakeholders, as well as the impact on supporting personal learning/development plans.

Deliverables: CS4, Regional information hub to support personalised learning for postgraduate students, Web Service specification for importing training record into portfolio.

WP6: Supporting life-long learning

Lead: Paul Horner

The interoperability exchanges in the first EPICS project were mostly illustrative case studies using fictitious data. This project will extend this to large-scale cohorts of real learners' data and also will capture much needed evaluation data on student and staff perceptions of the value of transferring portfolio information. It will also provide extensive pilots and well evaluated case studies in using ePortfolios to support personalised learning.

EPICS-2 will engage with emerging specifications and standards (e.g. IMS ePortfolio and LEAP) to

⁵ North East Collaboration Group for Researcher Development
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facilitate the robust and efficient flow of ePortfolio and PDP data between institutions, including participating in the JISC-CETIS Portfolio SIG. In addition the first EPICS project explored support for the EUROPASS-CV and HR-XML standards. These were demonstrated live at the international ePortfolios 2006 conference in Oxford, with a CV held in ePET exported and then uploaded in the EUROPASS Web site. At a strategic level we feel that it is important that ePortfolios should support multiple standards, as requirements vary across sectors and for specific purposes (e.g. use of HR-XML common in the recruitment sector). EUROPASS-CV is one of 5 elements of EUROPASS, which is linked to the Bologna process and may become an important standard for supporting mobility across the EU.

The development of Web Services/SOA approaches will also support the Mobile strand of this project (WP8)

Deliverables: CS5, CS6, CS7

WP7: Identity management exemplars

Leads: John Snowdon, John Moss, Tony McDonald

This work will explore the implementation of support for identity management systems in ePortfolios/blogs. We will produce ePortfolio exemplars using 2 or more identity management systems (such as OPenID, Liberty alliance, Shibboleth/CAS etc.). This will be complementary for other identity management initiatives planned in the region.

Deliverables: exemplars of ePortfolio using different identity management standards, short report

WP8: Personalised learning environments – Mobile technologies

Leads: Paul Horner, Simon Cotterill, John Moss, David Teasdale

This work package will aim to embed personal learning with mobile technologies, including the development of solutions for mobile portfolio/blogging with asynchronous connection to Web-based portfolios. This will complement existing work with mobiles, including projects funded by CETL4HealthNE, which have concentrated on synchronous Wifi connection to online portfolios⁶. In a collaborative position paper we have identified the need to extend mobile support so that learners can have seamless access to portfolios regardless of their proximity to wireless networks.⁷

This work package will be applicable to many work-based learning situations that do not have support for Wifi or other synchronous connection to ePortfolios. The particular scenario for which the work will be focussed on will be for students doing placements in Speech therapy. The directors of this programme have expressed a requirement for their students to have asynchronous access to portfolios on handhelds.

Deliverables: CS8

WP9: Evaluation

Leads: Jamie Thompson, Alison Stevens, Sue Gill, Simon Cotterill

This will demonstrate the long term sustainability of the outcomes of EPICS2 by comprehensively evaluating and documenting 'impact' and learning 'lessons' from the larger-scale implementation and embedding of ePortfolios, compared with the baseline situation (documented in EPICS) add value to institutional and other projects (including CETLs) in the region by ensuring that this project complements their activities. The evaluation team, which has considerable experience in these areas⁸, will liaise with work package contributors and produce and support a refined evaluation plan.

⁶ Cotterill SJ, Jones S, Walters RA, Horner P, Moss JD, McDonald AM On behalf of the CETL4HealthNE (2006) Evaluating the use of hand-held computers in undergraduate medical education Proc ASME 2006, Barcelona

⁷ Cotterill SJ, Angarita M, Horner P, Teasdale D, Moss J, Jones S, Walters R, Firth G, Hennessy S, McDonald AM, Fajardo R, Cendales JG, Quintero G. (2006) **Towards the m-portfolio** Proc. ePortfolios 2006, Oxford

⁸ Cotterill S, Gill S, Thompson J. Evaluating Portfolios: Mirrors, Maps and Sonnets Proc. The first International residential seminar: 'Researching and Evaluating Personal Development Planning and ePortfolios.' Oxford, 2006

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To maximise the impact of the project the evaluation of the larger pilots will require a more 'research' focussed case study methodology, with hypothesis testing and generation; (e.g. Yin, 2003⁹) and investigating the success of 'normalising' ePortfolios into everyday 'learning' practice.¹⁰ One or more of the pilots will also link with the national 'ELLI in HE' research project¹¹ being led by Jamie Thompson and involving many of the EPICS partners.

The project team will also comply with any overarching programme evaluation as outlined in the call and undertaken by the JISC or its agents. Evaluation is integral to engendering ownership among the partners, to gather formative and summative feedback on the project as it develops and inform the dissemination strategy. Feedback from stakeholders (partners, learners, staff, consultants, etc.) will be sought as part of the documentation of this project.

Deliverables: evaluation plan, evaluation report

WP10: Dissemination and documentation:

Leads: Simon Cotterill

Develop detailed dissemination strategy (in conjunction with other funded projects and the JISC). Will include: workshops with the partner sites (embedding) and wider audiences (understanding/awareness) within and outside the region; focus groups; documentation which will be presented in a 'handbook' of good practice, solutions, and a series of case studies (based on the use cases outlined above)

Further develop the EPICS Website <http://www.epics.ac.uk> to disseminate the activities and outcomes of this project.

National conference – involving the HE Academy Subject Centre for Medicine, Dentistry and Veterinary Science

Deliverables: dissemination for awareness, understanding and embedding, national conference, regional workshops, supporting documentation

WP11. Updated version of ePET available to FE/HE community

ePET was developed over 3 HEFCE/JISC funded projects. The activities of this project (WP3, 5, 6 & 7) will build on this to extend support for personalisation and interoperability in the ePET portfolio (WP3). An update version of ePET incorporating these features will be made freely available to the JISC community. Documentation, including a description of the stages of the 'journey' from small-scale to institutional implementation will be included on the Website. ePET is currently being used at 12 institutions with approximately 10,000 users.

Case Studies to support personalised, work-based, & life-long-learning

These large-scale studies, most of which will include cohorts of students using ePortfolios for a full academic year, will build on work from the EPICS and related projects and should produce findings that are applicable beyond the specific subject domains. As well as support at the Institutional level (Appendix 1), Degree Programme Directors and other Key personnel (Appendix 2) are 'on-board' to ensure Case Studies can be achieved. The scope and number of case studies may be broadened in light of the consultation stage and ongoing pedagogic discussions during the project. Planned case studies (related to Work Packages) include:

⁹ Yin, R.K. (2003). Case Study Research - Design and Methods (3 edition), Applied Social Research Methods Series Volume 5, Sage Publications.

¹⁰ For example see: May C (2006) A rational model for assessing and evaluating complex interventions in health care. BMC Health Services research 6,86

¹¹ For details of ELLI see: Effective Lifelong Learning Inventory - ELLI Online. <http://www.ellionline.co.uk/>

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CS1: ePortfolios to support personalised learning pathways in Combined Studies (WP3)

The ePET portfolio will be customised and piloted with students on the Combined Studies programme at Newcastle University. The programme allows students to select their learning from a diverse range of subjects and to try new ones, without committing to three full years in a single unknown subject area. The portfolio will be piloted for a full academic year (with ongoing support for at least 2 years if required) and evaluated in its ability to help support learning and PDP in a cohesive way for students learning across a potentially diverse range of subject areas. It is expected that the evaluation findings will have wider applicability beyond the context of this programme.

CS2: Piloting of ePortfolio/Blogs with Nursing Students (WP3)

This will involve customising and piloting the ePortfolio for a new subject area with students on a 6 month nursing module. The pilot will use ePortfolios to support requirements for reflection, PDP, and the evidencing of competencies during work-based learning placements.

CS3: Using blogs and community publishing to support WBL in Speech & Language Sciences (WP3).

Speech & Language Sciences (SLS) are part of the School of Education, Communication and Language Sciences at Newcastle University. The ePET portfolio was adapted for SLS curricula requirements and piloted with undergraduate and MSc students in 2005/6.¹² This case study will involve extending the ePortfolio for SLS to include greater personalisation and new 'community publishing' facilities (WP11). These new features will be evaluated in the context of WBL, with students who undertake a number of placements during their studies.

CS4: Personalised learning pathways for Postgraduate Students in a regional context (WP5)

Building on increasing collaboration between postgraduate training providers in the North East¹³ this case study will evaluate a regional information hub for postgraduate students which will be developed as part of this project. This will provide a centralised menu of postgraduate training opportunities across the region and enhance the ability of student's to plan and realise their personalised pathways for learning and development. The system will draw in information on training opportunities from local systems (and will specify who they are available to) and will also have the facility to manage booking for region-wide events. Where appropriate records of attendance will be transferred to the student's training record at their home institution. We will be evaluating the technologies and the impact on supporting personal learning/development plans.

CS5: Transfer of portfolio data in HE from undergraduate to Postgraduate (WP6)

We will be piloting the transfer of real data from undergraduate to postgraduate ePortfolio systems using and extending standards-based methodologies (IMS LIP, XML-RPC) developed in EPICS (the previous project was primarily small-scale transfer of fictitious data). This will include transfer of data for graduating students from the Biomedical Sciences at Newcastle University, where an ePortfolio was implemented in 2004/5¹⁴. As well as evaluation of technical efficacy we will also capture students' and other stakeholders perceptions on the value of transferring portfolio records.

¹² Whitworth A, Cotterill SJ, Bradford J, Stringer H, McDonald AM. ePortfolios in SLT Clinical Education: Preparing for the future. Bulletin of the Royal College of Speech and Language Therapists, 2007

¹³ North East Collaboration Group for Researcher Development

¹⁴ Calvert JE, Jowett T, Cotterill SJ. Use Of ePortfolios In Biosciences BSc Programmes At Newcastle University. Bulletin of the HE Academy Subject Centre for Bioscience, 2007

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CS6: Inter-institutional transfer of ePortfolio data between FE and HE (WP6)

This would involve collaboration with the JISC funded ComPort project which is being led by Gateshead College. The project, involving 4 FE Colleges, is comparing four different technologies and approaches to the use of ePortfolios and mobile technologies to support HE programmes which have WBL elements. EPICS-2 will add value to ComPort by supporting the transfer of data between institutions for 3 or more scenarios (e.g. transfer from one FE College to another, and to a NE University for additional studies). This will use and extend the standards-based methodologies developed in EPICS. Evaluation will aim to capture stakeholders perceptions on the value of transferring portfolio records, as well as assessing technical efficacy across the systems and institutions identified in the scenarios.

CS7: Mobile learning – to support use of portfolios in WBL (WP8)

This work package will be developing support for mobiles technologies for asynchronous connection to ePortfolios/blogs. The solution developed will be piloted with students in health related subjects who will be using mobiles for accessing reference information and other purposes in pilots funded by CETL4HealthNE. Curriculum leaders have identified a role for mobile technologies to support students who have several placements spread over a number of locations, many of which do not have Wifi and have limited or no access to the Internet.

The study will be applicable to many work-based learning situations that do not have support for 'continuous on' Internet access. Mobile portfolio solutions will be evaluated with students on placements as part of a broader CETL4HealthNE pilot of mobiles with over 200 students in health-related subjects. Curriculum leaders have expressed a requirement for their students to have asynchronous access to portfolios on handhelds in order to support reflection and evidencing their development.