

# Review of Learner Experiences of e-Learning: Strand B

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1. Author.....	- 1 -
2. Background .....	- 2 -
3. Methodology.....	- 3 -
4. Analysis of the bids .....	- 3 -
5. Strand B Analysis (64 bids) .....	- 4 -
5.1 Issues related to the Quality of Proposal and Robustness of Workplan.....	- 4 -
5.2 Issues related to Impact .....	- 8 -
5.3 Issues related to Partnership and Dissemination .....	- 10 -
5.4 Issues related to Value for Money .....	- 13 -
5.5 Issues related to Previous Experience.....	- 15 -
6. Conclusions .....	- 17 -

## **1. Author**

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## **2. Background**

Circular 05/06 'Learner Experiences of e-Learning' requested projects to develop further the community's understanding of how learners experience and participate in e-learning. This Programme builds on activities funded under the e-Learning and Pedagogy strand of the JISC e-Learning Programme. Specifically Phase One has already funded a scoping study, a support project to advise on methodologies and two short studies. Phase Two is informed by the outcomes and recommendations from phase one.

Total funding of up to £720,000 was available to fund proposals across three strands:

- A) one Learners' Journeys project (£120,000);
- B) up to six institutional projects on Learners' Experiences of Blended Environments (£80,000 each);
- C) one Support and Synthesis project (£120,000).

A total of 64 proposals were received under Strand B before the deadline. The selection panel agreed to fund the target number under each strand and noted that there were other fundable proposals within Strand B.

The large number of proposals received shows a high level of interest in the e-learning pedagogy strand in general, and in research around the learner experience in particular.

This study aims to identify the main weaknesses in bids received and suggest how bids can be strengthened in the future.

### **3. Methodology**

This study has been carried out using the following sources of information:

1. The call documentation:
  - a. JISC Circular 05/06: Learner Experiences of e-Learning;
  - b. Background to the JISC Circular 05/06: Learner experiences of e-learning.
2. Guidance to Markers of the Experiences of e-Learning bids;
3. Collated marks of the 64 bids received under Strand B, as used by the evaluation panel, and markers comments for all bids;
4. The 64 Strand B bids as submitted to the JISC;
5. The Minutes of the e-Learning Programme: Selection panel for Learner Experiences of e-Learning projects under circular 05/06, held on 25th January 2007.
6. The review of HE in FE bids by Mark Stiles (to ensure a consistent approach in providing feedback).

The process used for both Strands A and B has been as follows:

1. Analyse the markers' comments to define categories of problems with each bid.
2. For each bid, note which categories of criticism apply, referring to the actual bid to ensure a clear interpretation of markers' comments has been taken. These have been recorded against bid outcomes, average marks of each bid, and recommendation scores.
3. Review the bids for common areas where proposals were weak.
4. Review the bids for examples of good proposals or where proposals had addressed one particular criterion well.
5. Examine the call documentation in the light of this analysis to see if any potential causes of problems could be identified.

### **4. Analysis of the bids**

All bids were marked by one member of the JISC Executive and two members of the community. From the feedback and comments provided by the bid markers the following key problem areas have been identified.

## 5. Strand B Analysis (64 bids)

### 5.1 Issues related to the Quality of Proposal and Robustness of Workplan

Issue	Occurrence		
	Total	In successful bids	In unsuccessful bids
1. Risk assessment missing or incomplete.	18	2	16
2. Lacks detail of methodology to be adopted	17	0	17
3. The research questions proposed are not clearly focused	15	0	15
4. Deliverables not clearly defined	12	2	10
5. Lacks detail on data analysis	12	2	10
6. It is not fully clear how it relates to the call or is out of scope	12	0	12
7. Clarification of sample size required	11	0	11
8. Low number of case studies or large number of case studies	6	0	6
9. Lacks a detailed work plan	5	1	4
10. Lack of an innovative approach	4	0	4
11. Lacks detail of proposed research	3	0	3
12. The proposal is overlength.	2	0	2

#### **Guidance for Markers used when assessing this criteria**

- Is the proposal in scope?
- Are the research questions in scope?
- Does the methodology address the research questions?
- If appropriate, is the bid innovative and sound?
- Does the bid clearly articulate its intentions?
- Are there clear deliverables?
- Is the methodology for meeting the deliverables sound and achievable?
- Is the scale of data analysis realistic in the timescales?
- Is the work plan robust in terms of project management arrangements?
- Does the bid include a well thought through initial assessment of risks?

***Feedback and advice on issues related to the Quality of Proposal and Robustness of Workplan***

1. Risk assessment missing or incomplete

Some bids had not met the requirement given in the Circular to assess the risk involved in achieving the declared deliverables. The Risk assessment needs to identify pertinent issues and detail actions that could be taken to mitigate them.

**Advice to bidders:** Bids need to provide a full risk assessment that identifies issues and corresponding mitigating actions.

2. Lacks detail of methodology to be adopted

The Circular was explicit in the requirements for bids to develop a methodology to elicit a detailed picture of the learners' experiences of learning in a blended environment, drawing on established investigative methods (e.g. those used during Phase One projects). Bids were also required to identify strengths and weaknesses in the methodology chosen.

Some bids had not given enough detail on their methodology, had not aligned their methodology with the requirements in the Circular or had not identified the required strengths and weaknesses

**Advice to bidders:** Bids need to be explicit in describing their methodology and to ensure it meets the requirements given in the Circular

3. The research questions proposed are not clearly focused

The Circular encouraged bidders to address a small number of well focused research questions. It was necessary to list these research questions and link them to relevant data collection and sampling methods.

**Advice to bidders:** Bids need to be explicit in detailing what they are trying to achieve and which research questions they are addressing.

4. Deliverables not clearly defined

A number of bids did not clearly define the Deliverables

**Advice to bidders:** Bids need to be explicit in detailing what they are trying to achieve, how they are going to achieve it and what the outputs will be.

5. Lacks detail on data collection and analysis

In a number of bids there was a failure to connect the data collection and sampling methods with the research questions. It was necessary to detail how the analysis would be undertaken and how this would answer the research questions. In bids where this issue was noticeable the staffing details on data analysis were unclear. Given the variety of data capture methods proposed in some bids more prominence to the role of data analysis should have been given, especially for bids involving a large consortia and large numbers of learners.

**Advice to bidders:** Bids need to be explicit in their data analysis methodology and ensure they have identified individual(s) with the requisite skills to undertake this work.

6. It is not fully clear how the work programme relates to the call or the bid is out of scope

A number of bids did not clearly express the actual programme of work proposed. This was usually coupled with problems of scope, with bids showing a lack of clarity about the boundaries to the proposed work. There were cases of bids submitting proposals that had been submitted to previous calls. These had been adapted to meet the current call without fulfilling the objectives given in the call Circular. Rather than addressing what was required in the call, the proposal put forward a project that was focused on the personal research interests of an individual or group, or the development interests of the institution e.g to evaluate a course or the matter of technical implementation.

Some bids concentrated on the development of new courses that would benefit the institution(s) but had not fully matched these developments with the requirements set out in the Circular. The Circular explicitly called for bids to gather learner experiences of e-learning across a range of disciplines, levels of study and types of technology in blended environments in the further and higher education sectors.

**Advice to bidders:** Bids must be explicit in how they meet the requirements of the call and should be based on investigating the learner experience in the required breadth.

7. Clarification of sample size required

As part of the methodology it is expected that the bid states the sample size of learners, type of learner, level etc. This was missing or unclear in a number of the bids and the method for identifying the sample was vague or omitted.

**Advice to bidders:** Bids need to be specific in the sample size and how learners would be identified.

8. Low number of case studies or large number of case studies

Some bids declared a very small number of proposed case studies (< 6) or a large number (> 40).

**Advice to bidders:** Bids need to produce a suitable number of case studies commensurate with the complexity of the project and the level of funding

9. Lacks a detailed work plan

The requirements of the work plan were given in the Circular and should have included details on how the proposed methodology will address the key research questions and show innovation, as appropriate. Deliverables should have been identified and evidence provided of how these will be achieved, including an assessment of the risks. Other requirements were a description of the intended project plan, a timetable and deliverables.

**Advice to bidders:** Bids need to be explicit in detailing what they are trying to achieve, how they are going to achieve it and what the outputs will be.

10. Lack of an innovative approach

Some bids were considered not to have employed an innovative approach in defining their research questions. The Circular listed the issues that the research questions should address and some bids produced a bland approach (such as working with undefined student cohorts) that would not have a wide impact on the Programme.

**Advice to bidders:** Bids must be explicit in how they meet the requirements of the call.

11. Lacks detail of proposed research

There were a number of weak bids that contained generalised descriptions of the proposed work but did not communicate specifics such as aims, objectives, methodology, deliverables and evaluation details.

**Advice to bidders:** Bids must be structured, contain the information detailed in the Circular and be explicit in how they meet the requirements of the call.

12. The proposal is over the specified length.

The Circular gives clear instruction on the length of the bid and they should not exceed six single sides of A4 pages plus the cover sheet and appendices. The evaluators will discount any information provided beyond the indicated page limit and additional CVs. Essential information, such as the detailed budget or risk analysis, should never be an appendix but included as part of the main body of the proposal.

**Advice to bidders:** Bids must adhere to the requirements given in the Circular.

**5.2 Issues related to Impact**

Issue	Occurrence		
	Total	In successful bids	In unsuccessful bids
1. Relationship to institutional strategies not defined	20	0	20
2. Community-wide benefits not clearly defined	17	0	17
3. The project has a limited focus that would not offer a wide impact to the programme	15	0	15
4. Unclear if outputs will be freely available to the community.	4	0	4
5. No learner focus and potentially no external view	2	0	2

**Guidance for Markers used when assessing this criteria**

- Is the proposal a good idea?
- Does it address a technical or pedagogical area likely to be a great interest?
- Will the outputs be useful outside the institution(s) in the proposal?
- Does the proposal demonstrate that the project outputs will be available to the wider community?
- Is there evidence that the proposal has been developed in the context of relevant institutional strategies?

## ***Feedback and advice on issues related to Impact***

### 1. Relationship to institutional strategies not defined

Bids should be explicit in how they relate to the institutional strategies of all partners detailed in the bid. These strategies can include eLearning, Learning and Teaching, and Research Strategies.

**Advice to bidders:** Articulation to institutional strategies can be reinforced via a supporting letter from partner institutions.

### 2. Community-wide benefits not clearly defined

Some bids were “locally focused” to an extent that the deliverables of the project, or even the lessons that might be learned, were of debatable value to the wider community.

**Advice to bidders:** Bids should clearly identify the benefits to the Community.

### 3. The project has a limited focus that would not offer a wide impact to the programme

The Circular was explicit in stating that Outputs will be used to assist those involved in the support of student learning (including practitioners, support staff and institutional managers). The aim is to provide more effective environments for learning, and to inform the further development of the JISC e-Learning Programme. Many bids had too narrow a scope to have a wide impact on the programme.

**Advice to bidders:** Bids should address the issues in the Circular and be based on suitable research questions to ensure the bid is able to offer an impact to the programme.

### 4. Unclear if outputs will be freely available to the community.

The Circular states that funding is made available on the condition that project outputs are made available, free at the point of use, to the UK HE and FE community in perpetuity, and that these may be disseminated widely in partnership with the JISC. In a number of bids this was not clear.

**Advice to bidders:** Bids should state that outputs will be freely available to the community.

5. No learner focus and potentially no external view

The Circular clearly states the aim of the call is to gather learner experiences of e-learning. A small number of bids were focussing on technology rather than the learner experience and in doing so had little to offer the Programme.

**Advice to bidders:** Bids should explicitly state how they meet the requirements of the call.

**5.3 Issues related to Partnership and Dissemination**

Issue	Occurrence		
	Total	In successful bids	In unsuccessful bids
1. Dissemination plan incomplete or missing.	37	2	35
2. Weak on detail of partnership with JISC for areas such as planning and dissemination	30	1	29
3. Evaluation incomplete or missing.	10	0	10
4. The budgeted amount for dissemination seems disproportionate.	7	0	7
5. Insufficient mention of partnerships working with JISC programme managers or the Support and Synthesis project.	4	0	4
6. Doesn't show how study builds upon previous JISC projects	2	0	2
7. Licensing of output rather than Open Source dissemination	1	0	1

**Guidance for Markers used when assessing this criteria**

- Does the bid indicate the intent to work with JISC in planning?
- Does the bid propose an appropriate dissemination approach?
- Does it have an appropriate evaluation approach, e.g. talking to users?
- Does the bid demonstrate willingness to work in partnership with JISC in the dissemination and evaluation activities?

***Feedback and advice on issues related to Partnerships and Dissemination***

1. Dissemination plan incomplete or missing

Dissemination is highlighted in both the Circular and in the Budget template. Whilst it appeared as an activity in the Budget there was little detail given in terms of deliverables or activities. It is expected that all projects will undertake both internal and external dissemination activities.

**Advice to bidders:** Bids must make it clear how effective dissemination will be carried out, with a particular focus on disseminating to the appropriate communities.

2. Weak on detail of partnership with JISC for areas such as planning and dissemination

The circular clearly states that bids should demonstrate an openness and willingness to work in partnership with related projects and the JISC in forward planning, dissemination and evaluation. This requirement was overlooked in many of the bids.

**Advice to bidders:** Bids should clearly demonstrate a willingness to work in partnership with related projects and the JISC through their project work plans, dissemination plans and budget.

3. Evaluation incomplete or missing

Project level evaluation is specifically mentioned in the Circular and states that an evaluation process will be required in order to identify strengths and weaknesses in the chosen methodology.

**Advice to bidders:** Bids should evaluate project activities and the methodology used as opposed to just evaluating project outputs.

4. The budgeted amount for dissemination seems disproportionate.

A number of bids had either very small or very large Dissemination budgets. These budgets had not been fully justified.

**Advice to bidders:** Dissemination budgets should be realistic and a breakdown of costs provided.

5. Insufficient mention of partnerships working with JISC programme managers or the Support and Synthesis project.

The Circular stated that projects will work closely with the Support and Synthesis project in developing appropriate methodologies and sharing ongoing findings. In a number of the bids there was no reference to the Support and Synthesis project

or how these linkages had been planned. The funded projects will be expected to share process and product with each other and the support project, rather than work in isolation for two years.

**Advice to bidders:** Bids must clearly link to the Support and Synthesis project and recognise the need to engage with the programme.

6. Proposal fails to show how study builds upon previous JISC projects

The Circular stated that this call builds on the work of the JISC e-Learning Programme which has funded a series of scoping and research projects focusing on the learner's experience of e-learning (Phase1), under the Pedagogy strand.

It was expected that bids under the current call would build on previous work, and where appropriate, provide evidence that previous work had been investigated.

**Advice to bidders:** Bids need to show how they build on previous work.

7. Licensing of output rather than Open Source dissemination

The Circular states it is highly desirable that any software components of the deliverables are released under appropriate open source licences to ensure that they can also be freely shared with organisations and communities with which the JISC has close working arrangements. For other outputs, such as reports or model strategies, a non-exclusive licence allowing the JISC or its representative to utilise, archive and disseminate the work will be required. One bid wished to licence its outputs rather than use open source dissemination.

**Advice to bidders:** Bids need to be aligned to the JISC Open Source policy

#### 5.4 Issues related to Value for Money

Issue	Occurrence		
	Total	In successful bids	In unsuccessful bids
1. Institutional Contribution is low.	27	0	27
2. Missing or incomplete budget information	11	0	11
3. Low number of outputs for investment	10	0	10
4. Concerns whether the staffing resource proposed is adequate	4	0	4

**Guidance for Markers used when assessing this criteria**

- When considering value for money, refer to your assessment under quality and impact and compare this with the cost requested from JISC?
- Does the bid discuss the quantitative and qualitative benefits to the project partners of undertaking the work?
- Given the benefits, are the institutional contributions appropriate?

#### ***Feedback and advice on issues related to Value for Money***

##### 1. Institutional Contribution is low

The focus of a number of bids was on developing projects that would greatly benefit an institution or partnership. Some of these bids had a low Institutional Contribution. It would be expected that the institution(s) would make a significant financial contribution if they are going to obtain such a great benefit from the project.

**Advice to bidders:** The Institutional Contribution should be realistic and commensurate with the benefit gained from the project.

##### 2. Missing or incomplete budget information

The Circular included an Example Budget that should have been used as a template for providing the required budget information. Bids appeared to have had problems working with Full Economic Costing in order to calculate what might or might not be appropriate to include, both in terms of the money sought and the contribution made. Many important areas were under-costed, especially dissemination, internal evaluation and partnerships.

**Advice to bidders:** Full budgetary information must be provided using the FEC where appropriate. A guide to preparing bids for full economic costing will be made available soon.

3. Low number of outputs for investment

Given the scope of the call and funds available per project it was apparent that a number of bids would deliver a low number of outputs. e.g. small samples chosen

**Advice to bidders:** Bids should be producing the number and type of outputs as detailed in the Circular.

4. Concerns whether the staffing resource proposed is adequate

A number of bids listed senior members of staff who would be involved in the project for a small percentage of their workload. It was not always clear how they would be involved in the project and how they might be released from existing commitments and what they would be contributing. Given the need for data analysis and project management it is recommended that projects identify the individuals responsible for these roles, and explain how their commitment will be planned in terms of time-management.

**Note:** Staffing levels should be realistic and quantified in the terms of FTEs and their roles linked to the work plan activities.

## 5.5 Issues related to Previous Experience

Issue	Occurrence		
	Total	In successful bids	In unsuccessful bids
1. Limited evidence shown of running externally funded projects.	19	1	18
2. Reliance on a new member of staff is a concern	15	0	15
3. Missing or incomplete information related to management structure, governance, decision-making and funding arrangements.	14	0	14
4. Individual roles are not clear	14	0	14
5. Missing or incomplete CVs	13	0	13
6. Limited size of team.	6	0	6
7. Missing or incomplete partnership agreements	1	0	1

**Guidance for Markers used when assessing this criteria**

- Does the bid demonstrate a realistic understanding of the scale of the task, both in terms of research and management issues?
- Does the bid demonstrate previous successful delivery and management of projects?
- Does the bid link the expertise of the team with the roles to be undertaken?
- If the bid is from a consortium:
  - have the partners provided evidence of their commitment in the form of supporting letters?
  - have the partners demonstrated how the work aligns with their objectives and priorities?
  - is it clear what the role of each partner is and how the management structure, governance, decision-making and funding arrangements will function?

### ***Feedback and advice on issues related to Previous Experience***

#### 1. Limited evidence shown of running externally funded projects

It was not obvious from some bids whether the key members of the team had previous experience of running externally funded projects. This is a pertinent issue as the bids need to illustrate that project management skills are present.

**Advice to bidders:** Detailed CVs can be included as an Appendix allowing previous experience to be listed

2. Reliance on a new member of staff is a concern

A number of bids showed lack of awareness of the implications of the need to recruit and some projects are highly reliant on staff not in post. In a number of bids the data collection and analysis was left to an unnamed researcher, still to be appointed.

**Advice to bidders:** Bidders need to be aware of the long lead time it can take to appoint new staff and to ensure that the right skills are available to successfully complete the project. These issues should be included in the Risk Analysis.

3. Missing or incomplete information related to management structure, governance, decision-making and funding arrangements

With the prevalence of consortia or partnerships it is necessary that clear management structures, governance and internal decision making and reporting mechanisms are detailed.

**Advice to bidders:** Bids should include Project management and governance details.

4. Individual roles are not clear

A number of bids listed personnel involved in the project but did not provide details of an individual's role or responsibility.

**Advice to bidders:** Bids should include clearly identify roles and responsibilities of the team members.

5. Missing or incomplete CVs

Some bids listed personnel but did not provide details or a CV.

**Advice to bidders:** Detailed CVs can be included as an Appendix allowing previous experience to be listed

6. Limited size of team

Given the complexity of the work proposed in the bids it was surprising to find some projects would be run by a small team of 2 or 3 people.

**Advice to bidders:** Staffing levels should be commensurate with the level and complexity of the project.

## 7. Missing or incomplete partnership agreements

For collaborative bids there should be supporting letters from all partner institutions and details of partnership arrangements. These letters should be explicit in the benefit/value to the institution.

**Advice to bidders:** Supporting letters should be explicit in the benefit/value to the institution and should illustrate the strengths of the partnership

## 6. Conclusions

The issues raised from reviewing the bids for Strand B show that for a bid to be successful it needs to demonstrate the following characteristic features:

- be clear how it relates to the call;
- demonstrate it is in scope, for example, show that it is evaluating the learner experience rather than developing courses/technology;
- to include:
  - a full risk assessment;
  - a detailed work plan;
  - clearly defined outcomes and deliverables including a number of case studies;
  - a complete dissemination plan;
  - a complete evaluation plan, to include a project review;
  - details of methodology to be adopted including sample size and the sampling method;
  - details of the data collection methodology;
  - focussed research questions;
  - details on data analysis.
- ensure the proposal is within the page requirement;
- be clear that outputs will be freely available to the community;
- demonstrate that staffing requirements are realistic and the project has access to staff with the correct expertise and previous experience;
- illustrate the staff experience by providing CVs;
- contain sufficient information related to management structure, governance, decision-making and funding arrangements;
- include partnership agreements where appropriate;
- contain letter of commitment from all partners;
- take into account previous work and the opportunity to work with the Support and Synthesis project;
- define the relationship to institutional strategies;
- define the benefits to the wider JISC community;
- demonstrate willingness and plans to work in partnership with JISC for areas such as planning and dissemination;
- provide full budget information including a realistic Institutional Contribution.