



JISC Final Report

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1. Acknowledgements

a) Acknowledgements

JISC Institutional Innovation Benefits Realisation Grant – offer letter 4 March 2010

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JISC: £50,000 Benefits Realisation Funding

b) Report Summary

◦ *Project Overview*

The XCRI Knowledge Base has been created in response to requests from educational institutions to JISC for a single source of information on XCRI – the information model and schema recommended by the national Information Standards Board in January 2009 as the UK eProspectus standard. The aim of the project was to embed good practice in the management and exchange of course advertising information across the education sector for the benefit of learners seeking the right opportunity, and providers recruiting students.

The XCRI Knowledge Base builds on the inaugural work of the JISC CETIS team in creating the xcri.org facility to introduce XCRI to technical staff, particularly those concerned with standards and to support them in its implementation. The extended XCRI Knowledge Base additionally provides information to policy and managerial staff as well as technical, on what XCRI offers educational institutions and guidance on implementation. Case studies give an insight into the experience of institutions and consortia in securing approval for XCRI implementation and on the implementation process itself, including the technical, process and cultural issues. The project also developed a self-assessment tool - the XCRI Self-Assessment Readiness Framework, for use by staff in HEIs and FECs.

The content for the Knowledge Base drew on the expertise and experience of: the XCRI originators and developers; implementers of XCRI involving a wide range of educational organisations across the country, both individual organisations and consortia; and course collecting and publishing organisations. The approach adopted was informed through iterative workshops sessions, e-seminars and individual meetings.

◦ *Project Outputs*

- XCRI Knowledge Base www.xcri.co.uk (anticipated to move to xcri.ac.uk shortly)
- A database driven content managed website able to be easily extended and updated, hence built in sustainability
- Case studies from key XCRI implementers
- Frequently Asked Questions section, database driven and easily updateable
- XCRI Self-assessment Readiness Framework – a self assessment facility for institutions, <http://xcrisaf.igsl.co.uk/>.
- Launch/promotion events: Alt-C 7-9 Sept 10; XCRI Show Case event 5 Oct 10; Innovating e-Learning 2010 23-26 Nov 10
- Overall awareness raising of XCRI
- A plan to sustain and develop the project outputs in the future.

2.3 *Impact and Benefits to the Community*

- The XCRI Knowledge Base provides a vital resource for HEIs and FECs and different staff types within these institutions to find out a range of information about XCRI, and in a readily accessible form for these different audiences.
- The hub of high level expertise which now exists in pockets of the sector has to a large extent been harnessed and made accessible to both a wider technical community and a wider general constituency through the Knowledge Base and the Self-assessment Readiness Framework.
- The ready access to knowledge and experience, tools and contacts provided via the Knowledge Base and Self-Assessment Readiness Framework will increase awareness, understanding and hence adoption of XCRI across a wider constituency.
- The XCRI Knowledge Base supports networking across the community, enabling knowledge and expertise to be spread across the community and the community extended.

2.4 *Main Lessons Learnt*

- Through engagement with stakeholders at various XCRI sessions, it is clear that such a resource is needed; for those considering XCRI implementation, fact finding or as a single point of reference to communicate the concepts with other members of their organisation
- There is a significant knowledge bank of information and experience of XCRI in different parts of the sector and the people involved were very willing to share their experiences.
- The XCRI information model emerged and developed from the grassroots and as such has an array of commendable features, notably it is robust. The cultural differences between types of staff can sometimes mean that the merit of 'translating' the pertinent points to layperson's speak, particularly promoting 'headlines' for senior decision making staff who are non-technical is sometimes perceived differently by different types of staff. Ways of ensuring the interests of all relevant target groups are accommodated is important.
- A gear change in interest and take-up of XCRI is anticipated as soon as one of the main course collecting agencies, notably UCAS, fully endorse its take-up. At this point, the Knowledge Base is envisaged to really come into its own as a significant, major resource.

Main Body of Report

3.1 What did you do? (Methodology)

The project aimed to provide a single source of information on XCRI:

- for a variety of audiences in HEIs and FECs on what XCRI can offer their institution
- that relayed the experiences of other institutions who've taken up XCRI
- that included useful contacts who could help institutions make progress
- with up to date technical guidance on implementation
- as a platform for institutions to make an informed decision on whether to implement XCRI
- to encourage greater take up of the schema

This involved determining:

- who the Knowledge Base was for
- the overall structure of the Knowledge Base in this context
- what information the different audiences would find useful
- where these relevant sources of information were held and how best to acquire and make it accessible
- which information to make available and in a readily accessible and pertinent form for the different audiences.

The four core project team members were geographically scattered across the country. To ensure appropriate governance of the project and procedures for key decisions, the project management approach adopted mirrored that of Prince 2, all be it a lighter touch in view of the small scale of the project. In particular, the roles of the core members covered: project manager, lead supplier and producer role, and two 'user' roles.

At various stages of the project, user testing was undertaken via workshops and individual sessions. These included workshops at partner events and institutions: main events 19 April 10 (Huddersfield BR XCRI); 13 July 10 (Sheffield IWMW), 22 July 10 (Nottingham) and several individual sessions

The Knowledge Base was developed iteratively from this feedback. For example, on the Self-Assessment Readiness Framework: an early question in this self assessment originally read: 'do you have a business case?' Feedback indicated this could act as a deterrent to potential users of XCRI. Whilst some institutions will already have identified their business case and are using the self assessment tool to direct their next actions, others may be using the tool to create the foundations of their business case, hence such a question may not be helpful at this point. Consequently, this question was re-jigged and placed towards the end of the series of questions.

As the Knowledge Base was developing, user feedback informed its content and approach. However, by necessity, such testing tended to focus on one or two specific elements as they were created. To ensure the Knowledge Base is fit for purpose, the full facility will be subjected to scrutiny in organised sessions when it is live in its entirety and this feedback will be incorporated into the facility.

The project team was keen to gain credibility and authority for the Knowledge Base across a wide HE and FE constituency by establishing it on an academic domain name, xcri.ac.uk, via one of our partner universities. This has proven to be more difficult than anticipated. Until this can be achieved, the Knowledge Base is on xcri.co.uk.

For ease of updating, searching and maintenance, the project team made an early decision to mount the Knowledge Base service using a database architecture. This restricted hosting to systems that would permit installation and remote operation of a database by a variety of

staff, some of whom were not employed directly by academic institutions. Many university systems do not permit access in this way, so the project team decided to buy in a commercial service for web hosting. The service selected allowed deployment of MySQL, php and other common and open source web technologies. Owing to the relatively short time scale of the project, the team decided to work within the existing technical capabilities of team members. Joomla was selected as the approach, which had the additional merit of being an open source product.

3.2 *What did you learn?*

Please refer to item 2.4

3.3 *Impact*

- Prior to the XCRI Knowledge Base, xcri.org developed by JISC CETIS provided an excellent source of information on XCRI for technical staff, particularly those concerned with standards. However, there was no single source of information to inform senior decision makers and non-technical staff. Rather it was scattered between different people and organisations.
- xcri.org was a significant aid, but it required updating. BR Project budget has been assigned to cover the hosting, maintenance and updating of the XCRI Knowledge Base for an eighteen month period following the project end. This is anticipated to include the incorporation of XCRI CAP version 1.2 when it emerges. Thereafter, when it is envisaged the facility will be under JISC's auspices directly, the ability for updates will be fully made available.
- Google analytics has been incorporated into the facility to enable monitoring of usage. This information will be fully available to JISC.

a) *Conclusions & Recommendations*

- A detailed understanding and agreement of purpose is essential at inception; for example the balance of actively seeking greater uptake, versus a library resource. This links to determining what are appropriate messages for respective audiences, which is related to where respective people sit in an organisation.
- Ownership, long term of the facility. It is helpful if this can be determined at inception, however, it is recognised this is not always easy, particularly in current economic times. The project team had written into its proposal that sustainability and long term maintenance would be addressed during the project period. This was attempted vigorously in conjunction with JISC colleagues, but a definite conclusion was not reached. It would be useful to identify appropriate escalation and authority levels at an early date, in order to maximise the chance of achieving decisions about sustainability. This particular aspect of the project has not been helped by overarching political changes during the project's life.
- Key triggers such as the full endorsement of UCAS of XCRI and other organisations, such as area wide prospectus suppliers, skills funding agency etc. would make the project task easier to address and also ensure a gear change in the significance of the Knowledge Base. However, this is a 'chicken and egg' position with greater usage of XCRI by institutions also acting as a catalyst for agencies such as UCAS to consider full implementation.

b) Implications for the future

- Increased uptake of XCRI-CAP across HEIs and FECs across the UK as a result of the provision of a significant holistic resource.
- The facility has been made so it can readily be updated to ensure longevity and sustainability.
- As the Knowledge Base was developing, user feedback informed its content and approach. However, by necessity such testing tended to focus on one or two specific elements as they were created. Testing to date indicated the resource was fit for purpose, and testing on the full live version will be undertaken to enable any final tweaks to be made and this feedback incorporated into the facility.
- Webhosting and maintenance of the facility has been secured for eighteen months post project end. During this time it is anticipated that ownership of the site will be fully taken on by the relevant section in JISC.
- Also in the coming year it is anticipated that a European Norm, the Metadata for Learning Opportunities (MLO), will be approved. The next version of XCRI-CAP, version 1.2, will be compliant with this EN, making XCRI, and resources to support its take-up, of particular interest.

c) References

d) Appendixes (optional)

www.xcri.co.uk (anticipated to move to xcri.ac.uk shortly)
<http://xcrisaf.igsl.co.uk/>.