

Project Acronym:
 Version: 1.0
 Contact: Lou McGill
 Date: 08.08.08



Project Document Cover Sheet

Project Information			
Project Acronym			
Project Title	Project to improve the evidence base in support of sharing learning materials,		
Start Date	21 July 2008	End Date	28 November 2008
Lead Institution	Intrallect Limited		
Project Director	Charles Duncan		
Project Manager & contact details	Lou McGill lou.mcgill@gmail.co.uk Tel: 07726965122 skype: loumcgill4838		
Partner Institutions			
Project Web URL			
Programme Name (and number)			
Programme Manager	Neil Jacobs and David Kernohan		

Document Name			
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Author(s) & project role	Lou McGill, Project Manager Peter Douglas, Charles Duncan		
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Document History		
Version	Date	Comments
1.0	07.08.08	First draft project plan



JISC Project Plan

Overview of Project

1. Background

A substantial amount of work has been carried out into the motivation and barriers for sharing eLearning content. The purpose of this proposed project is to recognise that work and build on it to identify business models that work for UK HE. Evidence is required that sharing of eLearning content is occurring in a sustainable way.

In the past the “not invented here” syndrome has been evident. Although there was some sharing of eLearning content it was within an institution, or perhaps only within a department or, at best, between institutions as part of a funded project. Studies such [CD-LOR](#) (Community Dimensions of Learning Object Repositories) and “[Sharing eLearning Content: Synthesis](#)” have highlighted some of the communities in which sharing does occur. Other, high profile, examples such as [Open Learn](#) and [MIT’s OpenCourseWare](#) are also quoted as examples of sharing of content yet there are several different models on which communities are based. While it is still quite early to define which models are successful and sustainable it perhaps easier to identify some that are not. It is important to recognise that successful models for sharing eLearning content require a complex set of conditions to all be met. But a model may fail as a result of only one of these conditions failing.

[JISC’s RePRODUCE programme](#) is a bold attempt to encourage real reuse of content that is “not invented here”. This study can learn from the early experiences of RePRODUCE, in particular from the “cost” of reusing material from elsewhere in terms of discovery cost, technical adaptation cost, pedagogical adaptation costs, and context/activity costs. Do these costs outweigh the development costs of starting from scratch? This is one of the first large scale attempts to find out. However, this is only the first part of the life-cycle of shared eLearning content. Successful sharing will surely lead to multiple reincarnations of content, being reused again and again and mutating into completely different forms throughout the life-cycle. A genealogical analogy might suggest that through sharing (and reproducing) new generations of content will emerge and through “survival of the fittest” the content that is most potent and most adaptable will produce more offspring than that which is less effective and difficult to adapt. We need to be able to identify models that enable content to be shared over multiple generations.

Although the project will focus on approaches that will work for UK HE it is worth looking further afield for inspirational models. In order to keep the scope manageable the project will focus on only two models:

- Open sharing: There are several examples of open sharing and they are philosophically attractive in that they are aligned to the openness of the web. However, it will also be important to recognise that “open” and “free” are not the same. For example, OpenLearn has been made possible through a £5.65M grant and MIT’s OpenCourseWare required US\$12M just for the start-up and pilot phases.
- Subject-based sharing: Since most sharing has been shown to occur either with departmental colleagues (see for example surveys by [CD-LOR](#), [WM-Share](#) and [RepoMMan](#)) or through subject-based repositories (see [Rights and Rewards survey](#)) it is worth examining subject-based sharing as the second model. Not only are there a number of repositories based around specific subjects but [Intute](#) is subject-oriented and the [National Digital Learning Repository \(NDLR\)](#) in Ireland has found that setting up subject-based communities of practice is very effective.

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Business models and sustainability will also be reviewed and it will be useful to include work such as the report on [Sustainability and revenue models for online academic resources](#) already commissioned by JISC for the Strategic Content Alliance.

2. Aims and Objectives

The aim of this project is to improve the evidence base in support of sharing learning materials.

- The objectives of this project are to:
 - collect, collate, analyse, assess and present such evidence as exists in the UK and elsewhere, that is relevant to the case for or against the four scenarios given above, i.e.:
 - lecturers sharing learning materials;
 - lecturers using and attributing others' material
 - institutions putting in place policies whereby learning materials are well managed, so that they can be shared appropriately and reused over time;
 - the UK tertiary education sector as a whole putting in place arrangements in support of sharing learning materials.
 - develop from this evidence base, the best possible business cases for each scenario;
 - identify where there are gaps in this evidence base, and to suggest a methodology whereby a full business case could be developed;
 - discover and present actual business cases that have been used by the community, together with a commentary on their success or otherwise.

3. Overall Approach

This will be done by evaluating the subject from three different viewpoints:

3.1 Use and Reuse

By examining the eLearning content lifecycle what can we tell about the factors that encourage use and reuse?

To investigate business models and their effect on reuse. What effect does the business model have on encouraging or inhibiting reuse? Relevant issues already identified are cultural issues such as need for recognition and/or reward, legal issues such as choice of suitable licensing arrangements, technological issues such as interoperability and reconfigurability. This study will aim to build on existing work in this area with a view to identifying models in which barriers are minimized and through which a dynamic and vibrant evolution of content is encouraged. The RePRODUCE programme is clearly an important test-bed for existing models of reuse and will prove useful to obtain practical experience.

Methodology - The foundation method to be used for this topic will be desk research of existing literature. This will be supplemented by gathering information from the 20 RePRODUCE projects and the JISC CASPER (Copyright Advice and Support Project for Electronic Resources) Support project, who have been developing an overview of the issues (not just legal) affecting the projects. This will be carried out through interviews, mostly by telephone and a workshop to be run as part of a RePRODUCE programme meeting. An audit tool will be developed during this stage to record the different models that emerge with a view to developing a core template to be reviewed and adapted towards the end of the study.

3.2 Sustainability

Since not all approaches offer the same cost-benefit ratio which are the most sustainable in terms of funding sources and benefits gained?

The sustainability stage of this investigation will focus on programmes and initiatives designed to have long-term sustainability. It will be necessary to look at those which have failed as well as those which have succeeded. It will also be necessary to consider what can be used as a measure of success. Should this be measured in terms of the number of organisations involved, the growth of the service, the transformation triggered or some other measures? It will be instructive to examine models which have undergone multiple funding rounds as they need to make a case for sustainability extending

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beyond their first round of funding. Some programmes, such as the SFC elearning transformation programme³ was intended to act as seed-funding to bring about transformational change leading to sustainable structures maintained through institutional funding. Other organisations include those which act as gateways to eLearning content produced by many organisations such as the HE Academy Subject Centres⁴. Lessons can be learned on sustainability from other countries and from other disciplines as shown, for example by the draft report from Ithika on Sustainability and Revenue Models.

Methodology – Desk research will be the main source of information for this part of the study but this will be supplemented by interviews and possibly meetings with key informers. Contact with the authors and commissioners (Strategic Content Alliance) of the Ithika report will be valuable.

3.3 Models

What are the special features of the models examined? Are approaches used in one model transferable to another? How robust are the models? Where are they vulnerable and how can these vulnerabilities be protected?

Model comparisons: As only two models will be studied (in order to keep the scope of the project manageable) the models proposed are open sharing and subject-based sharing. There are a significant number of good examples in both spheres which will not only offer opportunities to study the common features of each model but also identify variations within the models. Among the open models to be studied we include OpenLearn⁵ (Open University), OpenCourseWare⁶ (MIT) and JorumOpen⁷ (JISC). Although JorumOpen is only going to be launched during the period of this study it is particularly interesting since it is a change in model brought about to achieve greater sustainability. For the subject-based models we expect to include examples such as HE Academy Subject Centres, IVIMEDS⁸ (an international organisation with its own business model in the medical sector, IRISS⁹ (based around social work and extending its reach from HE into FE and CPD), and NDLR¹⁰ (the Irish national elearning repository whose approach has been to focus on subject-centred communities of practice).

Detailed workpackages included as Appendix B reflect these approaches in more detail.

3.4 Critical Friends and feedback

The team aims to establish a group of people to act as critical friends and feedback on reports and business cases. These would come from a range of key agencies and JISC projects. This group would not act as a Steering Group so could be widened as the study progresses if appropriate. The suggested list is included in section 12. The team would welcome any other suggestion from JISC.

4. Project Outputs

- Project plans and documentation
- Interim report to JISC
- Final report for JISC and an external facing audience with executive summary and clear commentary on findings and conclusions.
- Business cases and business models will be made accessible to the wider community in pdf and word format.
 - Set of 4-6 actual business cases used by the community, with a commentary on their success or otherwise
 - Set of 4-6 constructed business cases, based on the evidence detailed in the report, which could be used as models by JISC and the community
- Up to 5 recommendations to JISC for future work

5. Project Outcomes

The study will investigate, identify and articulate the evidence for a range of business cases and models for sharing learning materials within the UK Higher Education community. The intention is

to create a set of models to illustrate the benefits of a collective approach to a range of stakeholders in a format that is accessible and usable by the different communities.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
Funding Councils, JISC and other funders of UK content development, repositories and other sharing mechanisms	Encouraging use of funded content and services	High
JISC services, HE Academy Subject Centres, CETLS, RSCs, Intute, JORUM	As above	High
JISC funded projects	Actual use of their outputs and resources	High
HE institutional managers	Business cases for sharing required to invest and support sharing of learning resources	High
HE staff in Academic Departments, Central Services	Users, creators and potential users, sharers of learning materials	High
Learners	Possible producers of some content, users and beneficiaries of content	Medium/High
Commercial producers of content	May or may not want to encourage sharing depending on the business models they prefer to adopt	Low
Providers of repositories and supporting services	Providing software and surrounding process to meet needs of a range of business models, but may help to shape models	High

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Illness or incapacity of key staff	2	2	4	The number of highly experienced staff in Intrallect and Intrallect Associates makes it possible for other staff, with equal experience, to take on new tasks if necessary
Inability to contact suitable exemplars	2	4	8	The team already have very good contacts in almost all the examples quoted and an existing awareness of the models
Projects being unwilling to reveal failures	4	3	12	We should be prepared to offer anonymity to encourage projects to discuss their failures as well as their successes
Inability to create genuine anonymity	3	1	3	It may be necessary to reconsider the format of the 'actual business cases' deliverable if anonymity becomes an issue

8. Standards

N/A

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9. Technical Development

N/A

10. Intellectual Property Rights

The project will comply with the terms of the JISC funding agreement. HEFCE will hold all intellectual property rights on behalf of JISC and the other funding councils. Contributors and other sources will be appropriately referenced and informed.

Project Resources

11. Project Partners

Intrallect Limited
Subcontracted: Lou McGill (Associate Consultant)

Charles Duncan	Project Director	C.Duncan@intrallect.com Intrallect Limited Regent House Blackness Road Linlithgow EH49 7HU Tel: +44 870 234 3933 Fax: +44 1506 670 922
Lou McGill	Project Manager 10% and Project Investigator	Lou.mcgill@gmail.com Associate Consultant c/o Intrallect Limited address as above Tel: 07726965122 Skype: loumcgill4838
Peter Douglas	Project Investigator	p.douglas@intrallect.com address as above Tel: +44 870 234 3933 Fax: +44 1506 670 922
Sarah Currier	Project Investigator	s.currier@intrallect.com address as above Tel: +44 870 234 3933 Fax: +44 1506 670 922

12. Project Management

The project will be overseen by Charles Duncan as Project Director. The project will be managed on a day to day basis by Lou McGill. Regular email, skype and telephone contact will be maintained by the project team and face to face meetings will be held at regular intervals.

The team aims to establish a group of people to act as critical friends who will be approached to provide feedback on interim and final reports, and business cases. The team hope to include the following in this group:

Neil Jacobs and David Kernohan (JISC), John Casey (JORUM), Allison Littlejohn or Anoush Margaryan (CD LOR), Catherine Bruen (NDLR), Andrew Rothery (Various JISC Projects), Ian Butchart (x4L steering group), Dawn Leeder (RLO CETL), Mark Stiles (x4L and JLT member), Liam Earney CASPER Support Project, Sheila MacNeil (CETIS), Interview participants as identified

13. Programme Support

It will be useful to receive alerts to any ongoing JISC work that may be relevant to the study. Some liaison with the Programme Manager for the RePRODUCE programme and the CASPER Support Project will also be necessary. The Project Manager will be responsible for initiating and maintaining contact as appropriate and will ensure that Programme Managers for this study are kept informed.

14. Budget

Attached as Appendix A

15. Workpackages

Attached as Appendix B

16. Evaluation and Quality Plan

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Ongoing	Appropriate level of depth in desk research	Are we getting a broad picture of potential sharing models?	Regular review of progress within the team	Appropriate amount of information to inform interview requirements and identify interviewees
Ongoing	Interviews	Are we talking to the right people?	Select examples and interviewees to ensure a representation from a range of people in the sector (managers, practitioners, technical and support teams) Check with JISC staff and appropriate service teams.	JISC satisfied with range of contacts.
		Are we asking the right questions?	Pilot test questions with key teams (eg JISC, CASPER JORUM)	Team satisfied that questions will enable final deliverables
End	Report content	Is the report appropriate, understandable, informative	Interim report feedback from JISC and Critical Friend Group	JISC satisfied with progress and final report
End	Business cases	Are the business cases accessible and useful?	Gain feedback from interviewees and Critical Friend Group	Clear, accessible and useful business cases

17. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
End	Final report and Business cases made available on JISC website	JISC and wider community	As per aims and objectives	Evidence of business case for sharing

18. Exit and Sustainability Plans

Project Outputs	Action for Take-up & Embedding	Action for Exit
Final report	Responsibility of JISC	Successful completion and acceptance of final report
Business cases	Responsibility of JISC	Accepted business cases

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address

Appendices

Appendix A. Project Budget

The total cost of this work to JISC, including VAT is £29,962.50.

A cost breakdown is given below.

Intrallect's standard day rate is £1000 per day. In this case we are offering a 40% discount on this standard rate.

Staff	
Total	£40,000
Discount of 40% on day rate -£16,000	
Total	£24,000
Travel and subsistence (6 trips at £250 each)	£1,500
TOTAL	£25,500
VAT	£4,425,50
OVERALL TOTAL	£29,962.50

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Appendix B: JISC WORK PACKAGE

WORKPACKAGES	Month	July		August				September				October			November					
21.07.08 to 28.11.08	Week	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19
1: Project Management and reporting																				
2: Desk research and interviews																				
3: Collate business plans and develop model plans																				

Project start date: [21.07.08](#)

Project completion date: [28.11.08](#)

Duration: [19](#) weeks

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Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
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WORKPACKAGE 1: Project Management and reporting <u>Objective:</u> To plan, set up and manage the study; maintain communications with project staff, appropriate JISC staff, appropriate JISC services, advisory group; report at appropriate intervals	21.07.08	28.11.08			
1.1 Finalise project plan, present draft to JISC by 08.08.08 for agreement	21.07.08	15.08.08	Project plan	Agreed project plan	LM
1.2 Establish and maintain mechanisms for regular communication between project team	21.07.08	28.11.08	Dates for regular telephone conferences and occasional face to face meetings in diaries		LM
1.3 Establish and maintain mechanisms for regular communication between project team and appropriate JISC staff	21.07.08	28.11.08	Dates for regular telephone conferences in diaries		LM, PD
1.4 Establish Advisory Group and liaise with this group to obtain feedback on key documents	11.08.08	14.11.08	Email list		LM
1.5 Report to JISC	21.07.08	28.11.08	Progress reports, Interim report (22.09.08), draft final report (14.11.08), final report (28.11.08)	Agreed Interim report Agreed Final report	LM, CD, PD, SC
WORKPACKAGE 2: Desk research and interviews <u>Objective:</u> To identify and compare a range of					

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<p>existing business models of sharing with reference to the four scenarios identified in the ITT and in relation to three different viewpoints identified in the proposal:</p> <p>2.1 Use and re-use: content lifecycle</p> <p>2.2 Sustainability: cost benefit</p> <p>2.3 Models: open and subject based</p>					
2.1.1 Analysis of existing documentation from previous JISC projects and wider evidence to identify models for sharing	04.08.08	17.10.08	Literature review		LM
2.1.2 Develop/adapt (and later refine) a template tool to gather comparable evidence around business models/cases	18.08.08	17.10.08	Template tool		LM
2.1.3 Liaise with JISC Programme Manager for RePRODUCE Programme to identify appropriate opportunities to engage with the projects and CASPER support project: interim project reports (18.08.08), Programme meeting (08.10.08), individual telephone interviews, online survey (after 18.08.08)	28.07.08	10.10.08	Summary of investigations, sample models, identification of common business model elements to feed into WP 2.3		LM
2.1.4 Identify and contact other possible interviewees that can illustrate interesting models for re-use to ensure that representations include a range of models, institutions and staff roles	04.08.08	10.10.08	Extra models to inform both WP 2.3		LM

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
2.2.1 Analysis of a range of programmes and initiatives designed to have long term sustainability. Identify measures of success. Identify potential interview candidates, and develop questionnaire/survey	04.08.08	10.10.08	Literature review; measures of success document; questionnaire/survey; list of interviewees		LM
2.2.2 Carry out a series of telephone interviews that can illustrate interesting models for sustainability to ensure that representations include a range of models, institution types and staff roles	18.08.08	10.10.08	Interview documentation; Summary to feed into final report; models to inform WP 2.3		LM
2.2.3 Identify which funding approaches offer a suitable cost-benefit ratio in terms of benefits gained	22.09.08	17.10.08	Summary to feed into final report		LM
2.3.1 Identify and contact a range of organisations through key contacts, to identify examples of models for sharing in both open content and subject-based models (team already has an initial list)	21.07.08	12.09.08	List of organisations and individuals		LM
2.3.2 Illustrate models in a comparable way and carry out interviews to refine and develop these.	15.09.08	24.10.08	Interview documentation; Summary to feed into final report; Initial model illustrations		LM
2.3.1 Present a range of models to illustrate both open content and subject discipline (or subject community) approaches to sharing.		31.10.08	Final Models to feed into WP 3	Final Models	LM, CD, PD, SC
<p>WORKPACKAGE 3: Collate models and plans and develop business cases</p> <p>Objective: Draw together the range of models and plans that have emerged through the study to</p>					

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Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
articulate the process and methodology for institutions to develop their own in relation to the 4 scenarios identified in the ITT. Deliver 4-6 actual business cases and 4-6 constructed business cases. Deliver up to 5 recommendations for future work.					
3.1 Identify the 4-6 most appropriate/transferrable models for the UK HE sector and create business cases for the 4 scenarios identified in the ITT	08.09.08	31.10.08	4-6 existing business cases	4-6 existing business cases	LM
3.2 Develop 4-6 model core business cases for the UK HE sector with guidance on the process and methodology	22.09.08	31.10.08	4-6 core business cases; guidance for sector	4-6 core business cases	LM
3.3 Identify 5 recommendations for future work in this area	21.07.08	31.10.08	Recommendation for input to final report	Up to 5 recommendations for future work	LM, CD, PD, SC

Members of Project Team:

CD = Charles Duncan
LM = Lou McGill
PD = Peter Douglas
SC = Sarah Currier