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Project Information			
Project Acronym	SOCIAL-SW		
Project Title	A study of the effective use of social software by Further and Higher Education in the UK to support student learning and engagement		
Start Date	14th July 2008	**End Date**	30th January 2009
Lead Institution	The Open University, UK		
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Project Manager & contact details	--- as above ---		
Partner Institutions	------		
Project Web URL	http://kn.open.ac.uk/public/workspace.cfm?wpid=8655 ***OR*** http://tinyurl.com/5a8zu3		
Programme Name (and number)	*JISC Learning and Teaching Committee; The E-learning Programme;* *JISC website link:* http://tinyurl.com/5gq6yk		
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Document Name			
Document Title	*Project Plan including the budget and work plan*		
Reporting Period	*End-July 08 and November 08*		
Author(s) & project role	Project team at the Open University		
Date	28th July, 2008	**Filename**	SOCIAL-SW_Study_Plan_280708.pdf
URL	*if document is posted on project web site*		
Access	☑ Project and JISC internal		☑ General dissemination

Document History		
Version	**Date**	**Comments**
1	280708	Project plan

JISC

JISC Study Plan

Overview of Project

1. Background

There are many schools of thought on learning, including behaviourism, cognitive psychology and constructivism. No single theory is used exclusively for the design of networked learning environments; instead, course designers tend to include principles from several perspectives (Anderson and Elloumi, 2004). As research progresses, new learning theories to support the development of online education are evolving. Over the last two decades, social theories of learning have assumed prominence in debate amongst researchers (e.g. Lave and Wenger, 1991; Mayes, 2001). Although the views of various social theorists differ (Nicol, *et al.*, 2003), there is a general consensus that interaction, dialogue and collaboration are essential for productive learning.

Technology can provide a medium for conversing and collaborating within the learning environment (Jonassen, *et al.* 1999; McConnell, 2006). The growing interest in social dimensions of learning has led to institutions adopting virtual learning environments (VLEs) which have collaboration and communication tools such as wikis, blogs, forums and chat. More recently, web-based social networking tools such as Facebook, GoogleDocs, del.icio.us and Flickr are being adopted in teaching and learning (e.g. Dron, 2007; Wiley, 2007; Mason and Rennie, 2008).

To integrate the social dimension into the pedagogy of online learning environments, Felix (2005) has proposed the synthesis of the cognitive and social constructivist approaches. In the cognitive constructivist approach, the focus is on cognition that occurs in the mind of the individual, with and the learner making intellectual sense of the materials on their own. The social constructivist approach emphasises the socially and culturally situated context of cognition, in which knowledge is constructed in shared endeavours (Duffy and Cunningham, 1996). The interactions in the online environment, for example, through collaborations or discussions over forums, or in wikis, or on blogs, enable knowledge to be constructed individually but mediated socially. The experiences of social interaction can be facilitated through interactive activities such as small-group discussions, simulation games, project-based work, and collaborative problem-solving activities (Beetham and Sharpe, 2007) and also interacting with social software tools which enable collaboration, community-building and knowledge construction (Nonaka and Takeuchi, 1995).

The term ‘social software’ covers a range of software tools which allow users to interact and share data with other users, primarily via the web. Social networking web sites such as MySpace, Facebook, Flickr, and YouTube are examples of some of the tools that are being used to share and collaborate for a variety of educational, social and other communicative purposes (Franklin and van Harmelen, 2007; Leslie and Landon, 2008). Educational institutions are increasingly making use of:

- tools that facilitate collaborative authoring, such as blogs and wikis (e.g. Farrell, 2006);
- web sites that enable sharing of bookmarks, photographs, and videos, such as del.icio.us, Flickr and YouTube (e.g. Leslie and Landon, 2008);
- social networking platforms such as Elgg (e.g. http://community.brighton.ac.uk/ last accessed 28th July 2008);
- 3-D virtual worlds, such as Second Life (e.g. Castronova, 2005, 2008), that facilitate synchronous group-discussions and meetings.

These, and other social software tools, are of increasing interest in education, and can be well grounded within the pedagogical activities of courses. However, the published research so far has tended to focus on the use of forums, blogs and wikis, rather than extending to encompass other social software. As a result, there are few guidelines for good pedagogical practice and effectiveness of the different social software tools. Studies are needed of:

1. how activities can be designed to include social software tools;
2. what are the benefits and problems associated with their use; and
3. the role of these tools in enhancing the learning and teaching experience.

Therefore, in this project, our aim is to collate data for 8-12 case studies from higher and further education institutions where social software tools have been employed. These case studies will be from a variety of disciplines and at different levels of the study programmes.

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2. Aims and Objectives

The goal of this study is to produce a report with 8-12 case studies which have used social software to support and engage learners, or have embedded the social software within the pedagogy of a course or a programme. The study will involve identifying suitable case studies in the UK Higher and Further Education (HE and FE) sectors and collecting evidence of the effective use of social software in supporting and enhancing student learning and engagement, and disadvantages, if any, of using such software.

The data elicitation and analysis will be guided by a case study template, adapted from the template has JISC has already used in other case study projects [*please see* ***Appendix A***]. During the development of the case studies and the report, the team will focus on:

1. benefits that the learners and educators perceive with the pedagogical usage of these tools – particularly for socialisation, which is antecedent to collaborative learning, collaboration, community building and student-retention;
2. design of activities and the challenges involved to situate the tool(s) in the context and learning outcomes of the course and/or programme;
3. learning experiences of the educators: what worked and what didn't work so well; whether or not the social software tool or the associated pedagogical activity is transferable to another context;
4. obstacles faced by students and educators – whether they are technological, usability-related, skills or training issues, or social issues (e.g. related to lack of engagement or privacy concerns);
5. accessibility issues and how they are being (or have been) addressed.

The findings from these case studies will be consolidated in a report, together with recommendations by the project team. The report will be of particular significance to policy makers in institutions, for highlighting the different pedagogical roles of social software: communication; nurturing creativity and innovation; and collaborative learning.

The project team, in consultation with JISC, will choose case studies that fulfil the following criteria:

- the social software used, or equivalent software tools, must be available in the public domain;
- The usage of social software is situated in the pedagogy of the course or a programme; or the social software has been used to support and engage learners and to enhance their on-line participation.
- Within the activity or activities where the social software tool is employed, if other e-learning tools are also employed, the social software should be the primary tool;
- studies selected are able to demonstrate evidence of effective practice (or evidence to the contrary). In order to fulfil this criterion it is likely that studies will have been running for some time (more than one semester), and will include a reasonable number of students/modules.
- Case studies from a variety of disciplines will be considered; for example, Languages, Computing, Education, and Business Studies;
- The portfolio of case studies will encompass a broad range of tools and skills: for example, group reflection (e.g. blogs); collaborative authoring (e.g. wikis), collaborative digital

photography (e.g. Flickr); social bookmarking (e.g. del.icio.us); collaborative 3-D modelling (e.g. Second Life); and so on;

- The portfolio of case studies will include a lifelong learning element. At least one case study will look at the more mature student and/or work-based learning;
- Not more than two case studies will be from the Open University (the researchers'/project team's own institution);
- At least one of the case studies will be from Further Education.

Associated notes from the Invitation to Tender (ITT) are as follows: The range of case studies identified will need to:

- Draw from a wide range of areas of activity and encompass a broad range of exemplar uses
- Enhance sector understanding of the current use of social software across a variety of subject and skill domains
- Demonstrate rigorous pedagogical approaches and in particular highlight any changes to pedagogical approach through the use of social software
- Include links to Virtual Learning Environment and Personal Learning Environment developments within institutions
- Be transferable to a range of contexts

3. Overall Approach

The methodology will be user-centred in the sense that it will involve direct interactions with the key stakeholders such as educators, learners and policy makers in the chosen institutions. We will apply the following techniques for data collection in this study: interviews, observations, and reflective diaries. The study leading to the report (key deliverable of this project) will be carried out as follows.

Identifying the institutions and specific contacts in the institutions for case studies: This will involve:

- posting invitations on mailing lists (e.g., e-learning-related JISC lists; ALT-C; Higher Education Academy) and liaising with UKOLN, named JISC and HEA bodies: From the case study document of JISC, some of the possibilities are:
  - JISC Regional Support Centres [FE &HE]
  - Other JISC services e.g. JISC infoNet, JISC CETIS, JISC TechDis [HE, possibly also FE]
  - Higher Education Academy Subject Centres [HE]
  - ILT Champions mailing list [FE]
  - JISC Learning and Teaching Practice Experts Group [FE & HE]
  - Heads of e-Learning Forum [HE]
  - ALT [HE & FE]
  - CETLs [HE, England]
- inviting colleagues at other institutions who have recently disseminated work in this area; it will be essential to clarify two aspects early on and in the invitation: the participating institutions will need to complete consent forms for giving permission for their quotations and images to be used and referenced in the case studies; and that the deliverable of this project (report) will be in the public domain (which, in fact, will be a valuable contribution to the educational community).

- inviting colleagues who are known to the project team, and with whom we have collaborated in the past, for example, colleagues at the University of Nottingham (Dr. Nick Mount) who have introduced podcasts; Keele University (Dr. Gordon Rugg) who are using wiki on their software engineering course; University of Derby (Dr. Simon Bignell) who has introduced Second Life in psychology courses, and Leeds Metropolitan University (Prof. Janet Finlay) who have been investigating the role of blogs, wikis and podcasts in teaching and learning.

Selecting the case studies:

- The range of possible case studies, as elicited by the various methods above, will be considered and discussed by the project team, in collaboration with the JISC Programme Manager;
- A suitable set of case studies will be selected (again in consultation with the Programme Manager) based on the criteria listed in Section 2.
- The institutional contacts for the selected case studies will be contacted, in order to explain the project processes in more detail, and gain agreement for the case study to be taken forward.

Preparing consent forms, templates and procedures for data collection and data analysis:

- The Commercial Legal Services team of the OU have looked at the study's scope and recommended that during the duration of this project, the project team seeks their advice and consults with the Rights Team on issues of Intellectual Property Rights, copyrights, Data Protection Act and Freedom of Information Act. We (project team and the Commercial Legal Services at the OU) have also looked at JISC's advice and terms and conditions regarding these issues. The Commercial Legal Services of the OU have devised a template of the consent form which will be adapted and used when seeking permissions from the participants [please see ***Appendix B***].
- This form will be accompanied by a summary sheet giving details of the project and how the information being captured for the case studies will be disseminated.
- The project team has reviewed the JISC case study template (earlier used by JISC in other case study projects – see ***Appendix A***). With the specific needs of this project in mind, and in collaboration with JISC colleagues, the project team plans to elaborate the template. For example, additional headings might be added to cover: technological requirements; situating the tool within the pedagogy of the course; accessibility issues; and skills and training requirements. Also, we might consider adding a section on 'Obstacles' to record aspects such as usability problems with the tool(s); steep learning curve; or specific skills and training requirements. In the section on 'Additional information', it might be useful to note whether the pedagogy and the need for student engagement drove the adoption of technology, or the availability of the technology led the educators to adopt it and then design the pedagogy around the tool(s). The outcomes of a JISC case study workshop, held on 29th July 2008, will form the basis for the template used for this study.
- The template for eliciting and documenting case study evidence will be submitted to JISC within four weeks of the start of the contract (that is, mid-August).
- The design of the data collection analysis materials will be guided by the case study template discussed and agreed with JISC. The materials will include artefacts such as the consent form (including consent for any multimedia assets such as photos, video- and audio-recordings); semi-structured interview protocols; observation and post-observation protocols, and diary protocols. The proposed template for the consent form is included in ***Appendix C*** of this study

plan. The project team will adapt the forms in Appendices B and C to develop one consent form for the study.

- The collection of case study materials at the OU will be carried out after seeking permission and approval from the Student Research Project Panel of the OU.

Setting up a project website and social networking facilities for collation of the materials:

- A project website has been set up on OU's Knowledge Network. This will be used as a vehicle for publicising the project, inviting participation, and for dissemination.
- A wiki will be set up to as a working area where materials of individual case studies will be collated, analysed and formatted for the required case study template. Once the draft version of a particular case study is ready for review, it will be sent as an e-mail to the primary contact in the participating institution, for feedback.
- The case study materials and other project documents will reside in the project space on one of the servers of the OU and will be accessible only to the core project team [principal investigator, co-investigator and the lead consultant]. The data will be stored on two desktop hard drives (backup).
- The consent forms from the participating institutions will be filed and stored safely. These will be delivered to JISC along with the report at the end of the project.

Interacting with individual teams for case studies:

- The stakeholders in the participating institutions will involve educators (course teams), academic and non-academic managers (for example, programme managers of the VLE or the e-learning programme, Deans of faculties, PVCs) and the students.
- With each of the participating institutions or groups, a primary contact person will be identified, along with a secondary contact. Through these contacts, procedures for identifying and approaching stakeholders such as e-learning advisors, course/module leaders and a representative set of students will be discussed and agreed. A schedule for liaising with each of the case study participants will be drawn up by the project team and agreed with the participants.
- Depending upon the location of the participant institution, availability of stakeholders and the technology, the data will be collected in various ways: personal visits to the institutions; e-mail interviews; reflective diary reports via structured templates; video-conferencing calls; meetings in Second Life; or via Elluminate (the web-conferencing tool); interviews or conversations over the phone or telephone-conference.
- The interviews will be audio-recorded (with participants' permission). If the interviews involve personal meetings and face-to-face sessions via video-conference, the interviews may also be video-recorded (if considered necessary). Photographs of the context (such as class rooms or labs where the technology is deployed) and the interviewees will be taken (with prior written consent). For each of the case studies, materials such as activities related to the social software technology, learning outcomes of the course, course materials pertaining to the use of the social software, and evaluation-data that the course team might have (e.g. student-feedback questionnaires) will be collated.
- Interviews with students will be held, where possible, in order to elicit their perceptions and experiences with the social software tool and the influence of the tool on their learning, community-building and collaboration. After the interviews, students and educators will also be given reflective structured templates which will facilitate their reflection, and they will be

asked to submit their reflective accounts within a week of the interview. The reflective accounts will help capture the information which they may have forgotten to mention at the interview stage.

- The data analysis will be guided by the case study template. The draft write-up of each case study will be sent to the participant-institution to review and comment within a specified time-period.
- The conclusions and recommendations for each case study will be derived from the data. The overall conclusions and recommendations from the case studies will be synthesised in the report [as per the objectives of the study outlined in paragraph 10 of the ITT]:

  - To enhance sector understanding of the current use of social software across a variety of subject and skill domains
  - Identify learning gains enabled by the use of social software
  - Identify difficulties and disadvantages associated with the use of social software
  - Assess learner engagement with social software
  - Identify the technology requirements (or the characteristics of technology requirements) for institutions to support learner activities in widespread use of social software for student learning
  - Identify the skills required by practitioners and learners specific to the use of social software
  - Identify any accessibility issues and discuss ways these have been addressed

- All outputs (which includes the case studies, methodology and the final report) will be written in a manner which ensures that they are easily accessible to a wide general audience (that is, to be written and formatted with a non-academic audience in mind).

Self-evaluation by the project team:

- The project team will meet fortnightly to review progress, reflect on the methodology and collate feedback in a way to iteratively improve the process.
- The report-writing will be a continuous activity. A document will be set up in the wiki and the case studies will be collaboratively developed in the wiki to generate a report (the key deliverable of the project).

Each case study will be accompanied by quotes and photos in the report. Other multimedia artefacts associated with each of the case studies will be placed on the project website (with due consent; please see templates of consent forms in the appendices).

4. Study Outputs

- The key deliverables of this study are the report and the case studies. The case studies will be available online and in the Appendix of the report. The report will focus on synthesising the findings from the case studies, and drawing conclusions for future practice. It will also include commentary on the methodology used for the study. The report and the case studies will be written in an accessible and engaging style, in order to encourage a wide readership and uptake.
- A publication (journal paper and/or a conference paper) on the case study methodology outlining the process: setting up criteria for choosing the case studies; establishing contact

with external and internal stakeholders; data collection, analysis and synthesis; and deriving recommendations.

- A publication (journal paper and/or a conference paper) based on the recommendations from this study (related to the effective use of social software in teaching and learning).
- Running workshop(s) for the JISC executive and community to share our experiences.
- Contributing to the JISC document: "Guidelines for JISC project teams on capturing and presenting case studies of exemplary practice."

5. Study Outcomes

- The lessons, as captured in the report, will influence the learning and teaching strategies in higher and further education – specifically, the institutions and educators who are considering the use of social software, or in general, undertaking technology-enabled learning and teaching initiatives.
- The study will provide insights about: influencing factors, role of context, obstacles, and advantages regarding the introduction and use of social software in learning and teaching. These insights will be useful not only for educational institutions but also for enterprises planning to use social software and other e-learning initiatives in their training and staff development initiatives.
- The case study methodology and our experiences will be useful for educators, researchers and practitioners who use the case study method in their teaching, research and practice.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
JISC	Funding body and advisors to the project; will look for a successful completion of the study and the impact of the study on HE and FE communities.	High
Participating institutions	Giving case study materials and their time; would like to see that their inputs are accurately reported, and that their contributions are duly acknowledged and used to help other practitioners.	High
HE and FE community	The report and case studies will guide the technology-enabled learning and teaching initiatives, particularly when social software/Web 2.0 tools are being considered. The findings will be very timely, as social software is of considerable interest in education at present.	High
OU	OU, as an institution, would like to ensure that the terms and conditions of the grant are met and the requirements (deliverables) are fulfilled. The Faculty of Mathematics, Computing and Technology have offered support and resources to the study.	High

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to prevent or manage risk
The material for some chosen case	2	4	8	The case studies will be chosen on the basis of strict criteria; however, to cater for this risk, the

studies is not adequate for inclusion in the report				project team will collate material for more than the minimum number (8).
Inability to find the proposed staff for the project	1	4	4	The OU has a very wide tutor-base (our recruitment pool for this project) and this situation therefore should not arise. The project team has sought advice from Staff Tutors at the OU about specific tutor-colleagues who have the appropriate expertise and who might be interested. (Staff Tutors are line-managers of the tutors in various regional centres of the OU.) Several possible consultants have already been identified. All have prior experience of using social software in education.
Inability to find a sufficient number of case studies	1	5	5	The project team is already aware of initiatives involving social software at the OU and at a number of other UK universities. In addition, calls for participation will be sent out via a range of mailing lists. Further, at the OU itself, we have several case studies involving a variety of tools and technologies and with large student groups. However, the project team will obtain the majority of case studies from other institutions and take up only a maximum of two from the OU.
Ethical procedures of individual institutions	2	4	8	Though the project team will seek ethical approval and permission (from the Student Research Project Panel) for the OU case studies prior to collection of data, it is possible that the individual institutions will have their own ethical procedures – specifically for contacting and interviewing students. If so, ethical clearance with individual institutions could be time-consuming. At the time of identifying the case studies for this project, enquiries about the procedures for access to students and student data will be made.

8. Intellectual Property Rights

The OU will provide signed consent forms (to be signed by the participants at the time of collection of case study materials) allowing the images of students and staff and other multimedia artefacts (such as video recordings, web pages) to be used on the JISC website. The template forms are included in ***Appendices B*** and ***C***.

The information provided in the reports of the study and the rights to all the other outputs shall become the property of HEFCE on behalf of JISC so that HEFCE can disseminate the information. All academic staff at the OU working on this project/study will sign an assignment form {included in ***Appendix D*** and the explanatory notes are in ***Appendix E***) assigning their rights in the materials

created to the OU who in turn will assign to JISC. When the contracts of the individual consultants will be set up, we (the core project team at the OU) will ensure that the consultants assign their rights in the materials created to the OU who in turn will assign to JISC. While interacting with the participant institutions, the case study materials and deliverables will be checked by the project team to ensure that we don not infringe copyright or other IPR of any third party.

Data Protection Act: We [the project team at OU] have received the following advice from the Legislation and Information office of the OU [28th July, 2008]:

For data protection, we (the project team) will make sure that we obtain the participants' permission to publish their names/pictures/quotes/etc. This will be ensured through the consent form [discussed earlier in this section and in Section 3]. We will explain clearly and fully how we will use the data and state where it will be published, for example on the internet, in a published report etc. However, we have been made aware that people have the right to withdraw their consent at anytime in the future. If we are publishing names etc. in a printed report, then we/JISC can't do anything about this once the report is published. However, if it is an online document or a website, we/JISC would have be prepared to make amendments to anonymise case studies.

We will inform the participants of the following: that the 'raw' or collected research data will be held in the Faculty of Mathematics, Computing and Technology of the OU. The 'raw' research data (names/contact details/opinions/ qualifications/experience/quotes/pictures etc) will be adapted and utilised for the case studies and the report, and, therefore, will be shared with JISC for the purposes of this research project and will only be used for the purposes of this research project.

Once we have any data about individuals, we will ensure that it is only used for your research purposes for this project, that it is kept securely and only colleagues who have a reason to see it, can access it [we have ensured that we have a dedicated server-space for this project which is only accessible to the core project team – principal investigator, co-investigator and the lead consultant]. If we collect any information which is classed as 'sensitive', that is, information about health, ethnic origin, religion, political affiliation [which is rather unlikely in this project], we will be even more careful about the security of data.

We will have some sort of archive/anonymisation policy in place, even if it is a note to review the data in three years time and make a decision then on whether it is necessary to keep all the personal data such as contact details etc, or if it can be deleted.

We will need to complete a data protection questionnaire available at OU's intranet and will submit it to Data Protection Liaison Officer of the Faculty of Mathematics, Computing & Technology and the Senior Manager - Legislation and Information Office, Strategy Unit of the OU.

Freedom of Information Act: OU is obliged to respond to enquiries about research projects. We have been made aware that people who ask for information don't have to state that it is a query under the Freedom of Information Act; it can be a simple letter or email. If we get any requests, we have been advised to contact Legislation and Information Office, Strategy Unit of the OU for advice and support.

Project Resources

9. Project Management

The project team will consist of the personnel from the OU, UK: Dr. Shailey Minocha (principal investigator); Dr. Karen Kear (co-investigator) and three part-time consultants. The OU has a large pool of very experienced Associate Lecturers from whom we will recruit part-time consultants. We will select consultants who have experience of social software/web 2.0 applications, as used in education. This experience may come from their work within the OU and/or work they have carried out for other educational organisations.

The project team will maintain close communication with each other via the project wiki, or face-to-face meetings, and will carry out fortnightly reviews of progress. Mr. Dave Roberts, formerly a Senior Consultant with IBM in the Emerging Technologies group, has been appointed as the Lead Consultant on the project. In addition, to working on 2-4 case studies, Dave will lead the team of consultants and will be involved in report-writing by consolidating the findings from all the case studies in this study.

10. Budget

The budget is included in ***Appendix F*** of the project plan.

Detailed Study Planning

11. Workpackages

Activity	Description	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Planning and set up	Submit a revised and detailed work plan to JISC by July 28th							
	Set up the project team: appointments of consultants							
	Set up equipment for the consultants							
	Set up wiki, project web site and server-space							
	Identify and establish contacts with participant-institutions							
	Submit the 'adapted' template for the case study to JISC by mid-August.							
	Develop data collection and data analysis protocols							
	Seek permissions and clearance from the OU's Student Research Project Panel for any OU case studies							
	Select final case studies, based on specified criteria							
Data collection and collation	Liase with participant-institutions for data collection as per the case study template; collation of the data on the server							
Data analysis	Transcription of the interviews (as needed); data analysis							
Evaluation	Evaluation of the project in terms of progress; methodology							
Draft case studies	Individual case studies in the JISC template along with the selected multimedia assets (photos, audio or video clips) will be placed on the wiki and server-space, respectively.							
Review	Review of the individual (draft) case-studies and assets by the participants							
Consolidation	Case studies will be consolidated (feedback from participants will be incorporated) and multimedia assets will be attached.							

Report writing	Writing up methodology and case studies in the wiki and collate and synthesis conclusions into final report.							

12. Evaluation Plan

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Fortnightly project meetings of the project team	Progress with regards to the project plan	Progress as per the project plan; any obstacles encountered; any deviations from the project plan	Meetings; communication via e-mail; project wiki	Meeting the objectives and the schedule as per the project plan
Monthly reporting to JISC	Progress and any issues/concerns that arise	Progress as per the project plan; any obstacles encountered; any deviations from the project plan	Phone meetings and/or reporting by e-mail	Meeting the objectives and the schedule as per the project plan
Submission of paper(s) to conference(s) and journal(s)	Usefulness of the contributions to peers	Effectiveness and appropriateness of the methodology and the recommendations	Writing the experiences in the form as paper(s)	Acceptance of the papers for journal(s) and conference(s)

13. Quality Plan

Output					
Timing	**Quality criteria**	**QA method(s)**	**Evidence of compliance**	**Quality responsibilities**	**Quality tools (if applicable)**
Interim monthly reporting to JISC	Meeting the objectives as per project plan	Matching the outputs with respect to the plan	Tangible outputs in terms of case studies and recommendations from the study	Project Team	Evaluation by the programme manager
Final report to JISC	---as above---	---as above---	----as above---	Project Team	---as above--- and any selected members of the JISC executive and wider community who will evaluate the report

14. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
Mid-August 08	Case Study Template	Project team; JISC; participants in the study	The template will guide the data collection and analysis.	Objectives of the study and how the data will be collected.
From July 08 – January 09	Web site: objectives of the study and the progress being made	----as above--- and colleagues in HE and FE community in the UK and	The uptake of the report's recommendations; receiving feedback	The significance of the study and the progress being made

		world-wide who are interested in the study	and inputs	
February – April 09	Paper(s) to journal(s)and conference(s)	---as above---	---as above--- and peer-review	Strategies for effective use of social software in teaching and learning; application of the case study methodology

15. Exit Plans

Study Outputs	Action for Take-up & Embedding	Action for Exit
Case Study Methodology	Conducting a workshop at the OU and/or in a JISC event	Publication (paper in a conference and a journal)
Recommendations on the effective use of social software in teaching and learning	Conducting a workshop at the OU or in a conference about how social software can be used in enterprises who are planning to use social software and other e-learning tools in their training and staff development events	End-of-project workshop at the OU and/or at a JISC event
Website with associated documents	The project has been set up at OU's Knowledge Network and will be maintained throughout the project.	The website will remain live after the project is over and any publications from the project subsequent to the project-completion will be uploaded on the website.

Appendixes

Appendix A. Case study capture document template

Interviewer **Date**	
Title of case study	
Contextual information	
Institution name	
Institution description	General FE College, HEI, specialist college etc
Address	
Key contact tel & email	
People interviewed:	Names and email contact details
Description of practice:	
Rationale	What were the drivers behind the initiative, external and internal?
Stage of development	When did the initiative start? How long has the practice been in place?
Curriculum context	In which areas of the curriculum has this practice been implemented? Give qualification, course and/or module titles.
Learner profile	What type of learners are involved – part or full-time?
	What age are the learners? What year/ level of study?
Pre-requisite skills if any	Do learners have to have certain skills or prior experience?
Learning objectives or intended outcomes	What are the learning objectives or intended outcomes?

Environment for learning:	
Cultural setting Physical setting, if relevant	What type of area does the institution support/what type of learners does the institution recruit or select? Where does the activity take place? What information is there about the institution e.g. size, type, number of FTEs etc

Mode of access	Is the learning situated at the college, or is it in distance or blended mode?
Social setting	Do learners work individually or in groups? Do they collaborate on tasks?
Tools	What physical tools e.g. hardware and virtual tools and software are used in this practice? *Please describe in terms that a non-technical person would understand.* Do learners own the tools? Can they borrow them for long term use? Are they able to take them out of the college? Can they be used 24/7?
Reasons for using this technology	Why was this technology chosen? Describe how it was adopted. What training is given?
Relationship to learning outcomes	How has use of this technology and this setting related to the learning outcomes?
Support considerations	What are the learning support implications? How has accessibility for a wide diversity of learners been taken into account?
Technical support requirements	What technical support is needed? What level and type of support has been made available?
Resources	What learning resources are used? Who prepares these resources?
Access issues	What issues, if any, around access to technology have been identified?
Costs	Are you able to give an estimate of the costs of using this technology/ this type of physical setting?

Pedagogic approach and learning tasks:	
General pedagogic approach	Describe the pedagogic approach taken. Is for example a particular type of learning aimed for e.g. project-based, collaborative, informal, apprenticeship, experiential, peer learning…?
Learning tasks or activities	What are the tasks or activities that learners engage in? (. are they gathering and evaluating facts, problem solving, acquiring skills, discussing ideas…) Please outline the general scenario and describe each task.
Feedback	How do learners receive feedback on their performance?

Locus of control	Who directs the tasks? Who performs the tasks, and in what roles? Who provides the feedback? (self, peer, tutor)
Time allocated	How much time do learners spend on these tasks? How is the time allocated? How much time is spent on getting to know the technology?

Outcomes for learners:	
Impact of the activity	Is there evidence of impact e.g. from assessments, user statistics or other quantitative data?
Learner feedback	What do learners say about their experience of learning with this technology? How was this feedback collected? What have learners said?
Quotes	Are there any statements about the activity from those involved in implementing it that might be quoted on the website or in a JISC publication?

Reflections:	
Resource considerations	
Sustainability	
Risks	
Benefits	
Unexpected outcomes	
Plans for the future	
Advice for others	
Further information	Publications, web based reports
Related projects	

Appendix B. OU Consent form (template)

PROGRAMME TITLE: ……..

RECORDING DATE (S): ……..

DETAILS OF CONTRIBUTION: ……..

1. I AGREE TO THE OPEN UNIVERSITY FILMING OR OTHERWISE RECORDING MY CONTRIBUTION.
2. I GRANT TO THE OPEN UNIVERSITY THE RIGHT TO EDIT AND ABRIDGE MY CONTRIBUTIONS.
3. I GRANT TO THE OPEN UNIVERSITY ALL BROADCASTING, PUBLISHING AND OTHER RIGHTS THAT THE OPEN UNIVERSITY CONSIDERS MAY BE NECESSARY FOR ITS TEACHING, ACADEMIC OR RESEARCH PURPOSES IN THE WHOLE OR ANY PART OF MY CONTRIBUTION (S) AND ANY RECORDINGS THEREOF.
4. I WAIVE ALL MORAL RIGHTS WHICH I MAY HAVE NOW OR IN THE FUTURE (INCLUDING, BUT WITHOUT LIMITATION) ANY OF MY RIGHTS UNDER SECTIONS 77 AND 80 OF THE COPYRIGHT, DESIGNS AND PATENTS ACT 1988, OR SIMILAR LAWS OF JURISDICTION.

SIGNED ON BEHALF OF THE OPEN UNIVERSITY.

SIGNED……

DATE……

I ACCEPT THIS ENGAGEMENT(S) & UNDERTAKE TO OBSERVE THE TERMS & CONDITIONS SET OUT HEREIN.

SIGNED……
…

DATE……
…….

NAME & ADDRESS OF CONTRIBUTOR:

(originally communicated by the Rights Department of the OU to the project team and adapted by the Commercial Legal Services of the OU on 17th July 2008)

Appendix C. JISC Consent form (template)

Print, Audio and Video Production
Permission Form

JISC

I, the undersigned, consent to the use of my words, image, image of my work or recordings of my voice being used within a JISC publication or video case study. I understand that this will be used for educational purposes only and that copyright will reside with the Higher Education Funding Council for England (HEFCE) on behalf of JISC.

I acknowledge that the quote, image or recording may also be used in, and distributed by, media pertaining to JISC activities other than a printed publication, such as, but not limited to, CD-ROM or the World Wide Web.

Copyright restrictions placed on JISC publications and case studies prevent content being sold or used by way of trade without the express permission of the copyright holder. Images and recordings may not be edited, amended or re-used without prior permission from JISC. Personal details of those taking part are not made available to third parties.

Please complete and return the form to:
Name

Address

Email:

Participant's details

NAME

ADDRESS

.

Signature

Date

Case Study Ref: (For office use only)	

Appendix D. Assignment of Patent, Copyright and other IPR

PROJECT RELATING TO *(insert project name etc.)*
I confirm that I have read and agree to abide by the terms and conditions of the Agreement between ***insert external party details*** and The Open University ("the OU") for the above project.

In consideration of the sum of £1 exclusive of VAT (receipt of which I hereby acknowledge) I hereby assign to the OU all patents, rights to inventions, copyright and related rights, trade marks, domain names, registered design and any other intellectual property rights whether registered or unregistered which subsist or will subsist, now or in the future, in any part of the world which I may have in the work that I have created under the Agreement on the understanding that:

a) this is done to enable the OU to honour its obligations under the Agreement and to facilitate the above project,

and

b) in the event that a royalty or other income is paid to the OU by ***insert external party details*** as a result of the commercial exploitation by ***insert external party details*** of such intellectual property then the OU will negotiate the share of such income in accordance with Clause 22 of the Terms and Conditions of Service for Full-Time Academic Staff dated July 2003.

I waive all moral rights and, so far as is legally possible, any broadly equivalent rights I may have in any territory of the world that I may have in the work created by me under the Agreement.

I agree to carry out all such further acts and things, and execute or procure the execution of all such other documents, as the OU may from time to time reasonably require in order to give the OU the full benefit of this assignment.

This assignment shall be governed by and construed in accordance with the law of England and Wales and each party irrevocably submits to the exclusive jurisdiction of the courts of England and Wales over any claim or matter arising under or in connection with this assignment.

Signature: **.....**
Insert academic's name and title

Date: **.....**

Insert faculty/department name

Note:

Please sign all 3 copies and return 2 copies to Commercial Legal Services, Finance Division, 2nd Floor, Chambers Building and keep one copy for your own records. (Of the 2 copies returned, one will be held with the contractual documents and the second will be forwarded to OU Personnel for their records).

(communicated to the project team by the Commercial Legal Services of the OU on 16th July 2008)

Appendix E. Explanatory Note Relating to the Assignment of Patent, Copyright and other IPR

1 This new form of assignment reflects current legal drafting styles;

2 The reference to £1 in the assignment is a legal technicality which allows the assignment to be valid. It is commonly used in documents of this type and is never actually paid.

3 The assignment is intended to provide certainty to both you and the OU. The OU needs the assignment to be able to enter into the commercial agreements required for the specified projects. Usually these agreements will require the OU to enter into (1) a warranty (like a promise) confirming that all the IPR is owned by the OU and (2) an indemnity whereby the OU is liable to the other party if a third party claims that he/she owns the IPR and not the OU.

4 The assignment will be kept with the commercial agreement and therefore available in the future to deal with any questions of IPR ownership which may be raised.

5 The waiver of moral rights essentially prevents you from claiming authorship of any IPR and from objecting to any modification to your work.

6 The clause requiring you to execute any other documents is in case further documents are required to complete a transaction in the future or to comply with foreign laws.

Commercial Legal Services
The Open University, UK
July 2007

(communicated to the project team on 16th July 2008)

Appendix F. Project Budget

Directly Incurred **Staff**	**August 07 – July 08**	**August 08 – July 09**	**TOTAL £**
Not applicable	£nil	£nil	£nil
Total Directly Incurred Staff (A)	**£nil**	**£nil**	**£nil**
Non-Staff	**August 07– July 08**	**August 08– July 09**	**TOTAL £**
Travel and expenses	£300	£3,700	£4,000
Hardware/software (digital cameras, pen drives, two desktop hard drives, Media such as CDs, DVDs, video tapes)	£1,500	£nil	£1,500
Consultancy (3 tutor – consultants) 126 days @ £115 daily rate plus NIC estimated at 7%	£3,692	£22,149	£25,841
Transcription (audio and video interviews)	£100	£1,100	£1,200
Incentives for participants	£250	£1,250	£1,500
Total Directly Incurred Non-Staff (B)	**£5,842**	**£28,199**	**£34,041**
Directly Incurred Total (A+B=C) **(C)**	**£5,842**	**£28,199**	**£34,041**
Directly Allocated	**August 07– July 08**	**August 08– July 09**	**TOTAL £**
Staff Shailey Minocha (24.25 days @ £290 daily rate) Karen Kear (7 days @ £282 daily rate)	 £1,160 £282	 £5,873 £1,692	 £7,033 £1,974
Directly Allocated Total (D)	**£1,442**	**£7,565**	**£9,007**
Indirect Costs (E)	**£1,154**	**£6,052**	**£7,206**
Total Project Cost (C+D+E)	**£8,438**	**£41,816**	**£50,254**
Amount Requested from JISC	**£7,284**	**£32,716**	**£40,000**
Institutional Contributions	**£1,154**	**£9,100**	**£10,254**
Percentage Contributions over the life of the project	**JISC** **80 %**	**(OU)** **20 %**	**Total** **100%**