MASSIVE

Modelling Advice and Support Services to Integrate the Virtual component in higher Education

Peer Review Handbook

Éducation et culture

eLearning

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1. INTRODUCTION

This document sets out proposals and procedures for carrying out the MASSIVE Peer Reviews and provides instruments and Guidelines for data gathering and analysis. It draws together and further develops strands of work that have previously been carried out within the context of the MASSIVE Peer Review process, notably the 'Methodology Report', the 'Peer Review Schema' and the 'Peer Review Visit Questions' developed by partners.

A key purpose of this document is to integrate this accompanying work and to address some of the 'gaps' hitherto not covered. Against this background, one of the main objectives of developing this 'handbook' is to ensure adequate 'triangulation' of different stakeholder perspectives within each of the participating review sites, and to prevent a single 'voice' dominating the results of the Review.

In order to achieve this, the Handbook provides for the utilisation of three different, though complementary data gathering methods: archive and documentation analysis; interviews and observation. It also proposes a three-stage process for the Peer Review, comprised of an initial 'set-up' phase; a subsequent phase of data gathering focused on the site visit, and a final 'analysis and synthesis' stage involving the production of recommendations arrived at through collaborative reflection between the MASSIVE team and the hosting institution.

2. OVERALL APPROACH

The overall approach has largely already been specified in the 'Methodology Report', and incorporates the following purposes:

- To carry out a review, based on collaboration between participants and 'experts', of the delivery and support services in the MASSIVE participating Universities
- To provide formative feedback on the current 'state of the art' in the participating universities
- To identify 'gaps' in provision, and suggest ways of addressing these gaps
- To provide support to enable the participating Universities to improve and further develop their 'virtual capacity' and to improve their practices
- To apply the results of the Review to developing a model of support services for the virtualisation of traditional universities

2.1 Participants

As specified in the Methodology Report, the following ***participants*** should be involved in the Review:

- Teaching staff involved in the delivery of courses
- 'Specialist' staff, particularly those responsible for course design; platform design and maintenance; course administration and evaluation
- other stakeholders (e.g. managers and administrators)
- Students

- Visiting experts (2 per participating University)

2.2 Data sources

As with the case studies, data collection involves a combination of a range of methods and instruments. These include:

- **Documents and Archives** – these encompass a range of 'secondary' data, including: documents and reports (brochures; prospectus and course outlines; 'mission' statements; records of Committee meetings; evaluation reports). Another source of archival data will be logfiles (for example recording utilization rates and patterns of use of the technology platforms and services).
- **Interviews** – these include structured/semi structured interviews (administered 'face to face', by e-mail or by telephone) and focus groups
- **Observation** – this includes 'direct' observation (which implies some form of engagement with participants, for example getting learners to 'think aloud' when using instructional services) and 'indirect' observation (for example participating in a classroom setting without directly engaging with learners).

Table 1 summarises the proposed data sources to be used.

Table 1: Peer Review Data Sources

Category	Type	Example
Documents and archives	Log files	Automated frequency counts of student participants in on-line seminar
	Policy documents	University policy on IPR
	Awareness-raising and information	Student prospectus on e-learning
	Reports of meeting	Minutes of Senate sub-committee on e-skills for staff
	Teaching materials	Multimedia distance learning module, Introduction to social sciences
Interviews	Policy-makers and administrators	Semi-structured interview with Vice-chancellor
	Teaching staff	Semi-structured interview with course tutor
	Technical staff	Semi-structured interview with on-line technical support officer
	Students	Focus groups with 10 distance learners
Observation	On-line Learning event	Participation in on-line Group Seminar
	Off-line event	Observation of professional development course for University staff

2.3 Elements and tools

The constituent elements of the Peer Review Handbook as set out in the following sections, is comprised of the following:

- Briefing paper for peer reviewers (which aims at providing concrete and operational guidelines to peer reviewers so as to manage the process effectively.)
- Briefing paper for Receiving/hosting Universities - which aims at i) presenting the overall scheme/framework in terms of aims, expected results, services provided, processes, requirements ii) providing methodological and operational information and instruction to hosting Universities. iii) setting up the arrangements for data collection
- Promotional materials (some promotional materials - paper based and electronic - will be used to attract the interest of university staff and to clarify the aim and dynamics of the peer-reviewing exercise)
- The data collection toolkit, including:
  - Guidelines for documents and archival data
  - Interview schedules (for policy-makers and management staff; technical support staff; teachers; students)
  - Focus Group guidelines
  - Observation Guidelines
- Data analysis guidelines, including a template for collating and reporting on the Peer Review results

3. BRIEFING PAPER FOR PEER REVIEWERS

3.1 Stages of the Review and activities to be undertaken

The Peer Review process is in three stages, as shown in Table 2.

Table 2: Peer Review Stages

STAGE	OBJECTIVES	ACTIVITIES	TIMING
I. PREPARATORY	• Establish purposes, expectations and parameters of review • Identify data sources and contacts (name & job title of every person who will be interviewed & which of the 6 service areas they can contribute to) • Collect initial data • Plan activities for stage 2 • Collate and analyse initial data	• Adapt and/or translate Briefing paper and promotional material • Send briefing paper and promotional paper • Send positioning questionnaire (translated if necessary) • Send data and logistics checklist (translated if necessary)	1 month before the visit
		• Obtain completed questionnaire, checklist and requested documentation • Analyse documentation • Carry out on-line observation	3 weeks before the visit
		• Devise Site Visit Plan • Modify data collection tools as required	2 weeks before the visit
		• Complete and forward Site Visit Plan	1 week before the visit
II. SITE VISIT	• Clarify outstanding issues from preparatory data collection • Carry out on site consultation and data collection activities	• Briefing Meeting • Interviews • Focus Groups • On-site Observation • De-briefing meeting	During 2 days peer review visit
III. ANALYSIS AND REPORTING	• Analyse data • Interpret results • Produce recommendations • Report back	• Data collection • Data analysis	2 weeks after the visit
		• Produce Peer Review Report • Forward Report	4 weeks after the visit

3.2 Peer Review logistics and timetable

The hosting universities, Peer Review teams and timetable for the site visits are shown in the Table below.

MASSIVE PEER REVIEW VISITS							
University	**Host**	**Team chair**	**Team member**	**Team member**	**Sugg. Arrival Date**	**Peer visit Dates**	**Other Meetings**
Edinburgh	Jeff Haywood	Konrad Morgan	Claudio Dondi	Andras Szücs	Tues 28/02	1-2/03	
Barcelona	Mario Barajas	Konrad Morgan	Isabel Pérez	Amrei Tenckhoff	Sun 12/03	13-14/03	
Granada	Isabel Pérez	Konrad Morgan	Mario Barajas	Madeleine Morgan	Wed 15/03	16-17/03	
Budapest (Szolnok college)	Denes Zarka	Jeff Haywood	Walter Kugemann	Denise Haywood	Mon 27/03	28/29/03	
Erlangen	Walter Kugemann	Jeff Haywood	Begoña Arenas	Paul Sire	Tues 9/05	10-11/05	
Bergen	Konrad Morgan	Jeff Haywood	Joe Cullen	Annemie Boonen	Wed 24/05	25-26/05	

3.3 Data collection and analysis

As outlined above, the Peer Review approach envisages three stages: preparatory; site visit; analysis and reporting. The preparatory stage is intended as a significant data collection exercise, which will: establish the position of the hosting university within the 'e-learning life cycle'; identify where e-learning is situated within the overall 'mission' and 'vision' of the University; establish the strategic and operational resources available to deliver on this vision and mission; identify sources of data to enable an assessment to be made of the outcomes and impacts of virtualisation, and the 'gaps' to be addressed.

For these reasons, the ***Thematic Positioning Questionnaire*** is a key medium for data collection. This needs to be sent to a suitable informant prior to the site visit. It is set out in Section 4 below.

The Site Visit is intended to deepen understandings of the situation in the hosting university, on the basis of the results of the preparatory stage of the Review. It has two main purposes: to obtain further data and clarify issues raised by the results of the preparatory stage of the Review; to provide 'triangulation' of these results by considering other positions and perspectives other than those of senior managers. To achieve these aims, a ***Peer Review toolkit*** is provided in Section 6 of this Handbook. It contains schedules to carry out interviews and focus groups with key stakeholder groups, and guidelines to observe relevant activities.

The final stage of the Review focuses on analysing the results of these data collection activities; integrating the results and interpreting them to come to a position on key recommendations that can help the hosting university move forward along its chosen path of 'virtualisation'. Guidelines on data analysis, integration and recommendations are therefore provided in Section 7 of this handbook.

4. BRIEFING PAPER FOR HOSTING INSTITUTIONS

4.1 Overview

The purpose of the Peer Review visits which will take place as part of the MASSIVE Project (www.massive-project.org) is to explore, with colleagues in the universities which have agreed to participate, the developments in up to six aspects of the use of e-learning within the university. These aspects (areas) are:

- University strategies in the integration of ICT in teaching & learning
- Evolution of university libraries in their support of e-learning
- Management of IPR of digital learning materials
- Support for teaching staff in their use of e-learning
- Support for students for e-learning
- Design of online courses

Your university has chosen to explore {*list here*} with us, as you feel that these are areas in which you would value an external review by professionals in the area of e-learning.

The Peer Review will take place in three stages:

I. **A Preparatory stage** – this will entail gathering background information about your institution, and its current and future planned use of e-learning. An important part of this information gathering is the 'Positioning Questionnaire', presented below, which should be completed by someone in your University who is well informed about these issues, and sent back to the MASSIVE team prior to the site visit. We are also asking for relevant documents that will help us build a picture of how your University approaches e-learning. These should also be sent to the MASSIVE team prior to the site visit.

II. **A Site Visit –** which will involve a collaborative dialogue between the MASSIVE peer reviewers and a range of representatives of the University. The visit will provide an opportunity for the reviewers to gather more information, through interviews and observation, and for both reviewers and 'host institution' to explore key issues relevant to e-learning strategies.

III. **An Analysis and Reporting stage –** on the basis of the data gathered from the preceding stages, this final part of the Review process will focus on the production of recommendations arrived at through collaborative reflection between the MASSIVE team and the hosting institution.

4.2 Preparatory Stage

The hosting institution is requested to complete and return the following 5 documents provided below:

- Checklist fore the selection of areas to be peer reviewed
- Interviewees checklist, which sets out the basic information about the University key actors and how they can contribute to the 6 service areas
- Thematic Area Positioning questionnaire, which provides background information on the relevant e-learning areas selected and described above
- Document checklist, which provides the Peer Reviewers with materials to illustrate this background information
- Logistics checklist, which sets out the activities planned for the Site Visit

4.2.1. Checklist of areas to be peer reviewed

As you may know from the information provided by your contact from the MASSIVE project, your University has to select to be peer reviewed in some of the areas identified by the project (from 3 to 6 out of: University strategies in the integration of ICT in teaching & learning, Evolution of university libraries in their support of e-learning, Management of IPR of digital learning materials, Support for teaching staff in their use of e-learning, Support for students for e-learning, Design of online courses)

We request you to fill in the following table:

Name of University	Service area	Mark with X	Reasons for selecting the area
	1. University strategies in the integration of ICT in teaching & learning		
	2. Evolution of university libraries in their support of e-learning		
	3. Management of IPR of digital learning materials		
	4. Support for teaching staff in their use of e-learning		
	5. Support for students for e-learning		
	6. Design of online courses		

4.2.2. Interviewees checklist

This checklist sets out the basic information about the University key actors and how they can contribute to the service areas selected by their University. It is intended to be one side of the coin, complementing the Thematic Area Positioning questionnaire described here below.

Universities are asked to complete and return the following checklist. The questionnaire can be completed by a single representative of the hosting institution which will work together with their contact from the MASSIVE project (Jeff Haywood, Mario Barajas, Isabel Pérez, Denes Zarka, Walter Kugemann & Konrad Morgan) or by the MASSIVE contact.

The interviewees should have an overview of the strategic and operational processes of the host institution, covering from 3 to 6 of the aspects selected of the use of e-learning within the university.

Name of interviewee	Job title	Contribution to the areas selected

4.2.2 Thematic Area Positioning Questionnaire

Name of University:	
Name and Job Title of Person(s) completing questionnare:	
Contact e-mail:	

Each of the interviewees included in the table above is kindly requested to complete and return the following positioning questionnaire in the theme selected. The questionnaire can be completed by a single representative of the hosting institution or can reflect the combined views of a number of representatives. The questionnaire should be completed by representatives who have an overview of the strategic and operational processes of the host institution, covering the six aspects of the use of e-learning within the university.

The questionnaire asks for responses to four types of question:

- Diagnostic questions – which relate the institution's 'mission' to e-learning
- Strategic questions – which cover essentially the strategies and resources available to institution to enable it to carry out its mission and objectives..
- Operational questions – which cover how e-learning strategies are put into practice
- Questions about how operational practices are measured – focusing on benchmarking and performance indicators developed and used, and what they say in terms of the outcomes and impacts of e-learning

The questionnaire also seeks to capture examples of good practices in relation to e-learning that have been implemented in the institution, and, conversely seeks to identify key areas for improvement.

The questionnaire covers each of the six E-LEARNING THEMES.

For each theme your University has selected you are asked to:

- Firstly, complete the 'Diagnostic' grid. This asks for opinions on a range of items, such as the institution's 'vision' of the role of e-learning within the overall university 'mission', and examples or illustrations of how this is expressed in things like policy documents
- Second, complete the 'strategic', 'operational' and 'benchmarking' grids – these ask for your estimation of the current implementation position of your institution on a range of items specified, together with examples or illustrations of implementation
- Third, complete the 'good practices' grid. This asks for example or illustrations of both good practices and things that need to be improved.

AREA 1: UNIVERSITY STRATEGIES FOR E-LEARNING

Diagnostic

Item	Details/Examples /Results
What policy and political drivers are shaping the use of e-learning by the university (regionally, nationally, internationally)?	
In what ways is the university undergoing restructuring changes? (e.g. more 'customer-focused' approach; introduction of managed learning systems; closer linkages to jobs; performance-related systems)?	
What role is e-learning intended to play in delivering the 'mission' of the University?	
Where is the university currently placed in the e-learning 'spectrum' (e.g.: Traditional university using ICT/ virtual component to deliver some aspects of education and training services; Traditional university using ICT to link activities in these various sites; Group of independent traditional universities collaborating through ICT; Single independent university which has study centers or campus distributed over a wide area, and which are virtually linked; Institution fully based on a virtual environment.)	
Where on the spectrum does it intend to be in the future and when is this likely to happen?	

Strategic, Operational, Benchmarking Grid

	Item	Rating	Details/Examples /Results
Strategic	Formal strategy to guide planning and implementation of e-learning?		Objectives: Who responsible: Situation in overall planning process:
Operational	Methods are used to check that the strategy is being implemented?		
	Process (units, committees, working groups etc) to put the strategy into practice?		
	Processes aware of the strategy and consider that they are implementing it?		
	Teaching and support staff know about and understand the strategy?		
	Students know about and understand the strategy?		
Benchmarks	Measures of extent of uptake of e-learning are available?		
	Measures of quality enhancement due to use of e-learning are available?		

***Rating scores**:*
0 = not intended
1= planned but not implemented at all
2 = partially implemented
3 = fully implemented

Good Practices Grid

What would you say is good about the use of e-learning to support the mission and values of your institution?	
What key aspects of e-learning are missing and or need to be improved?	

Current and Intended Provision

Using the Table below, please indicate, firstly, the proportion of teaching provision intended to be delivered either partially or fully on-line and, secondly, the current proportion of courses delivered on-line in each of the subject areas specified.

Subject areas	Planned		Date target to be achieved	Current	
	% fully on-line	% partially on-line		% fully on-line	% partially on-line
Sciences					
Computer studies					
Arts & humanities					
Social Sciences					
Other (specify)					

Notes:
Include 'pure' and 'applied' sciences; medicine; Mathematics; Engineering under 'Sciences'
Include Languages under 'Arts & Humanities'
Include Law; Environmental and Architectural studies under 'Social Sciences'

AREA 2: EVOLUTION OF UNIVERSITY LIBRARIES

Diagnostic

Item	Details/Examples /Results
Who is actually responsible for day-to-day Library management in the university? How many people are involved?	
Are there any clear criteria for selecting and acquiring resources? Do they give the same priority to digital resources than to printed ones?	
Apart from given access to digital and non digital bibliographic resources and information, does the library offer any other services?	
Are there any online guides and FAQs to support the users in their search for resources and information?	
Does the library offer any support on the use of IT to the users or to the library staff? If so, what kind?	
Are there any online communication channels to increase feedback among all the actors: managers, staff and users?	
Has the library planned and/or taken any assessment or evaluation process?	

Strategic, Operational, Benchmarking Grid

	Item	Rating	Details/Examples /Results
Strategic	Specific strategy to adapt traditional services to the new pedagogical and technological factors?		
	Computing and library services coordinated?		
	Plans to improve user's services?		
	Procedure to support and to assess all library staff?		
Operational	Does the library system use standards?		
	Are all the competencies needed in the library actually available?		
	Are any support/advice/competence needs perceived on this issue?		
	Tools to assess the library services?		
Benchmarks	Have any measures of convergence of computing and library services been developed and used?		
	Are there available guides, FAQs, manuals and any other documentation on how to use the services, especially IT facilities?		
	Has a formulated support and training plan for the users been developed and implemented?		
	Has a staff training and development plan been developed and implemented?.		

***Rating scores**:*
0 = not intended
1= planned but not implemented at all
2 = partially implemented
3 = fully implemented

Good Practices Grid

What would you say is good about the use of technology to support library services in this institution?	
What aspects of the library services need to be improved?	

AREA 3: INTELLECTUAL PROPERTY RIGHTS MANAGEMENT FOR DIGITAL LEARNING MATERIALS

Diagnostic

Item	Details/Examples /Results
How aware are the University management and staff of the legal, technical and management issues that are required for dealing with copyright IPR?	

Strategic, Operational, Benchmarking Grid

	Item	Rating	Details/Examples /Results
Strategic	How aware are the University management and staff of the legal, technical and management issues that are required for dealing with copyright IPR, especially those that are specifically brought about by the digital e-learning environment?		
	Is there a formal IPR Strategy and/or policy that is publicly available and manageable?		
	Who is responsible for the strategy?		
	What is the policy concerning ownership rights of materials?		
	Is there a long term strategy to make copyright materials internally or externally tradeable assets? (shared repositories, etc.)		
	Will strategy change in the light of the ongoing technological/ digital revolution?		
Operational	How is the strategy being implemented in terms of contractual terms for staff and/or suppliers or “clients” of materials?		

Benchmarks	Are there formal contracts covering such things as moral and/or commercial rights, articles & books vs online texts, re-editing, licensing etc?		
	Are there any IPR management procedures or systems in place?		
	Are students informed of their legal rights and obligations when handling copyright materials?		
	Are measures available of use of (recentl contractual documents, publishing or sharing agreements and IPR management and protection tools (DRMs, etc,).		

Rating scores:
0 = not intended
1= planned but not implemented at all
2 = partially implemented
3 = fully implemented

Good Practices Grid

What would you say is good about how the University handles IPR issues?	
What aspects of IPR need to be improved?	

AREA 4: SUPPORT FOR STAFF IN E-LEARNING

Diagnostic

Item	Details/Examples /Results
What are the existing IT skills among educators?	
What are the existing IT skill gaps among educators?	
Is there a formal mechanism to support development of IT skills among educators?	
What changes does the introduction of eLearning bring to the University's teaching and learning models?	
What didactic and pedagogical materials/resources and services are needed to improve teacher's skills in order to perform and act in new IT learning and eLearning scenarios?	
How do educators receive training in how to adapt their traditional class materials into digital formats?	
What resources are available or required for the provision of courseware designers?	
Are there any needs for education in Instructional Design?	
Is there any provision for technical support to teachers during lectures or broadcasts?	
Is there training on how to identify, recognise and certificate competences	
Are any E Learning competence certification schemes for staff and educators in place?	

Strategic, Operational, Benchmarking Grid

	Item	Rating	Details/Examples /Results
Strategic	How does the University encourage the adoption of IT and eLearning models?		
	What implications do new course design and implementation bring to delivery and evaluation strategies?		
	What policies exist to ensure correct and efficient use of technology?		
	Are there any policies/mechanisms/promotional activities aimed at attracting and supporting the access of non-traditional students?		
	Does the University policy support the recognition and certification of staff competence in IT?		
	Does the policy support self-reflection/self-assessment processes of IT competences recognition amongst its staff?		
	What kind of working and learning progression is in place for people who have had their competences certified?		
Operational	Teachers training in IT skills before using elearning in class?		
	Educator support in determining how materials are to be made available to students and how assessments are to be handled		
	Ensuring that digital media resources function correctly whenever required		
	Resources to enable educators to respond to student questions in a timely manner		
	Additional supports to allow educators to deal with the flexible deadlines of lifelong learners?		
	Additional supports to deal with non-traditional learners who fall behind the class schedule?		

	Supports to develop and implement alternative credit accumulation schedules and delayed examinations occurring outside the fixed academic calendar?		
Benchmarks	Is there a formulated training plan for the staff.		
	Measures to assess support to the staff.		
	Assessment of results of training programmes.		

***Rating scores**:*
0 = not intended
1= planned but not implemented at all
2 = partially implemented
3 = fully implemented

Good Practices Grid

What aspects of staff support are good?	
What aspects of staff support could be improved?	

AREA 5: SUPPORT FOR STUDENTS IN E-LEARNING

Diagnostic

Item	Details/Examples /Results
What is known about student needs and expectations for use of e-learning?	

Strategic, Operational, Benchmarking Grid

	Item	Rating	Details/Examples /Results
Strategic	Is there a strategy that guides e-learning support for students?		
	Where does responsibility for e-learning support to students reside?		
	How is this support resourced in the university planning?		
	How are students enabled to make input to these processes?		
Operational	Support life cycle (pre-entry to post graduation?)		
	Which units support students in their use of e-learning and what services do they offer?		
	How do they evaluate their services		
	Planning for and resourcing their services in the future		
	Informal supports to students through tutors and teaching staff?		
Benchmarks	Service level agreements		
	Student satisfaction measures		

***Rating scores**:*
0 = not intended
1= planned but not implemented at all
2 = partially implemented
3 = fully implemented

Good Practices Grid

Provide examples of good practices in providing support to students in e-learning	
What key areas in student support need to be improved	

AREA 6: DEVELOPMENT OF ONLINE COURSES

Diagnostic

Item	Details/Examples /Results
What kind of e-learning activities does your institution offer? (eg supplementary, blended learning, distance learning, virtual classroom, collaborative learning)	e.g. total number of courses that use e-learning within your university
What e-Learning platform(s) or/and Learning Management System(s) are used?	
Do you think that your range of e-learning developments is complete?	
Does your institution mean to introduce some other types of e-learning activities in the future?	
Has your institution developed any plans in order to assess the process of designing online courses?	

Strategic, Operational, Benchmarking Grid

	Item	Rating	Details/Examples /Results
Strategic	Does your institution have a strategy or methodology when designing online courses?		
	Has your institution undergone any external evaluation(s) with respect to its online course design before?		
	Did you revise or improve the your design of e-learning courses in any way?		
Operational	Section of the University responsible for designing and putting courses and activities online?		
	What stages does the online course design process in your institution undergo?		
	Designated main 'actors' involved in that process?		
	Involvement of teachers in the process of designing and implementing these courses?		
	Online courses or any online learning activities subject to process of evaluation and accreditation?		
Benchmarks	Measures of quality assurance of the courses and materials .		
	Guides and manuals on how to design online materials.		

***Rating scores**:*
0 = not intended
1= planned but not implemented at all
2 = partially implemented
3 = fully implemented

Good Practices Grid

Provide examples of good practices in on-line course development	
What key areas of online course development need to be improved	

4.2.3 Document checklist

As indicated above, we are asking for relevant documents that will help us build a picture of how your University approaches e-learning. These should be sent to the MASSIVE team prior to the site visit. The term 'documents' here refers not only to text (such as reports and promotional literature) but to other forms of content, such as multimedia teaching materials. The following Table shows the types of documents we are interested in together with some examples of each type.

Type	Example
Log files	Automated frequency counts of student participants in on-line seminar
Policy documents	University policy on IPR
Awareness-raising and information	Student prospectus on e-learning
Reports of meeting	Minutes of Senate sub-committee on e-skills for staff
Teaching materials	Multimedia distance learning module, Introduction to social sciences

For each of the six areas covered by the Review, please identify relevant documents you feel will illustrate your University' current and intended position; list the documents identified in the Table below, identifying the questions and themes from the 'positioning questionnaire' they are intended to illustrate, and send them to the MASSIVE team. An Example is shown as follows:

Example:

Area	Documents provided	Questions/themes illustrated
Evolution of university libraries in their support of e-learning	1. Libraries Committee Report on upgrading of library services 2. URL for on-line Library Help-Desk	1. Does the library management team have a specific strategy to adapt its traditional services to the new pedagogical and technological factors? 2. Are there any online guides and FAQs to support the users in their search for resources and information?

Please complete the Table below

Area	Documents provided	Questions/themes illustrated
Evolution of university libraries in their support of e-learning		
Management of IPR of digital learning materials		
Support for teaching staff in their use of e-learning		
Support for students for e-learning		
University strategies in the integration of ICT in teaching & learning		
Design of online courses		

4.2.3 Logistics Checklist

The Site Visit is primarily intended to further build on the picture of the University developed through the preparatory stage of the Review. As indicated above, the Review will collect further data about the University mainly through interviews (including 'group' interviews or focus groups) and observation. These 'data gathering' activities will be preceded by an initial 'briefing meeting' between the Reviewers and members of the hosting institution, to finalise arrangements for the Visit, and the visit will end with a 'de-briefing meeting' between these same participants, intended to agree on 'next steps'. The Table below summarises the range of activities proposed.

Activity Type	Participants	Example
Briefing	Peer Reviewers; host representatives	Group discussion with vice-chancellor and Head of Technical Support
Interviews	Policy-makers and administrators	Semi-structured interview with Vice-chancellor
	Teaching staff	Semi-structured interview with course tutor
	Technical staff	Semi-structured interview with on-line technical support officer
	Students	Focus groups with 10 distance learners
Observation	On-line Learning event	Participation in on-line Group Seminar
	Off-line event	Observation of professional development course for University staff
De-briefing	Peer Reviewers; host representatives	Group discussion with vice-chancellor and Head of Technical Support

Please complete the following Table to provide details of what activities are planned, when they will occur, and who will be involved.

Activity Type	Detail of activity (e.g. focus group; type of observation)	Participants	Date/Time/Location
Briefing			
Interviews			
Focus Groups			
Observation			
De-briefing			

5. PROMOTIONAL HANDOUT

This section is aimed at informing the participants involved in the Review (Teaching staff involved in the delivery of courses, 'Specialist' staff, particularly those responsible for course design; platform design and maintenance; course administration and evaluation, managers and administrators and Students) to:

- let them know about the project,
- let them know the visit is happening;
- inform them about who will be visiting;
- how they can help.

The promotional materials - paper based and electronic - will be used to attract the interest of university staff and to clarify the aim and dynamics of the peer-reviewing exercise.

The tools that we may use to inform the University staff to be peer reviewed consists of:

- an **official letter** to be sent to the University representatives,
- a **FAQ informal document** to solve some questions about Massive and the peer review to be carried out.

The first is intended to officially inform the managers and administrators about the visit and the second intends to be an informal set of information for all the actors involved in the peer reviews.

Both of them need to be adapted and/or translated (into ES, HU, DE, NO) to each peer review session by one of the members of the team at least one month in advance to the peer review visit.

It would be also welcome to provide the host University with some project leaflets in English.

The team of 4 of each peer review visit must coordinate themselves to adapt, translate and include corrections to these materials in close contact between them and particularly with the host and team chair.

5.2.- Model of letter to University decision-makers

Here below we have included a model of letter that was drafted for the first peer review in Edinburgh and that may be well considered a model for the rest of peer review sessions:

USE MASSIVE HEADED PAPER

Name of the decision maker
Official address

Date

Dear (---),

We should like to invite the University of (---) to take part in an e-learning peer review which will take the form of a visit by a small number of members of the MASSIVE Project Team. Your university has already indicated its interest in, and support for, the MASSIVE Project and we are grateful to you for your commitment.

MASSIVE ('Modelling Advice and Support Services to Integrate the Virtual component in Higher Education,' www.massive-project.org) is a European Commission-funded project which is designing a model for the various support processes that are required in European traditional universities that wish to implement e-learning in teaching.

By taking part in the peer review you will benefit from an independent external review of the current stage of your implementation of e-learning. The review will be carried out by senior university and business representatives who are very experienced in the field of e-learning. The team will gather information from your university about its current activities and intentions, using a pro-forma in advance of the visit and by interviews during the visit. At the end of the visit there will be a short feedback session and a written report will be produced for you thereafter.

If you wish to participate in the peer review we would like you to identify a senior colleague to be our contact (As your university is a member of the MASSIVE Project, we suggest that this should be ---). You and/or the contact should decide which of the six areas of e-learning you would like the MASSIVE team to review (choose four or more).

These areas are:

1. University Strategies for the integration of ICT into teaching/learning practice
2. Evolution of University Libraries
3. Management of IPR issues
4. Support to Teaching Staff

5. Support to Students
6. Design of online courses

More detail about the questions we will ask in each area are shown in the attached proforma.

Your contact should let us know which areas you wish to explore.

In preparation for the visit we will then ask your colleague to write brief answers or comments to the questions which our team has developed, and to let us have a sample of appropriate documentation. These will give us insight into your use of e-learning. He or she will need to help arrange the two-day visit; particularly ensuring that key staff (for example in the Library or the IT services) is available for interview, either singly or in groups. It may also be useful for the team to visit locations to see specific aspects of your e-learning developments in practice.

After the visit we will ask for feedback on the visit process and also for comments on the written report, to ensure that we have accurately understood what was said. The reports as such will not be made into public documents.

We are aware that peer reviews take up time and resource and so we shall try to be as unobtrusive and undemanding as possible during the visit.

We will treat the information that you give to us with respect and in confidence, and we will include your university in all decisions about its use and dissemination in our project reports.

We thank you for your help.

Yours sincerely

Signature of one of the leaders of the MASSIVE Project Peer Review Team for the given University (Jeff Haywood or Konrad Morgan)

5.3.- FAQs

What is Massive?

MASSIVE (Modelling Advice and Support Services to Integrate the Virtual Component in Higher Education: www.massive-project.org) is an EU funded project under the eLearning initiative in the 2004 call.

The aim of MASSIVE is to design a model of mutual support services for **European traditional Universities to successfully implement the virtual component of teaching**, focusing on the following specific objectives:

- To define a conceptual model for the integration of ICT in the teaching and learning practice;
- To identify and classify good practices in the organisation of support services to the University community regarding University virtual components;
- To explore and compare the elements for transferability according to a mutual support non-commercial model;
- To validate the approaches to develop the support services;
- To guarantee the wide dissemination of the practices and the use of the model.

What is the aim of peer reviews?

The purpose of the Peer Review visits which will take place as part of the MASSIVE Project is to explore, with colleagues in the universities which have agreed to participate, the developments in up to six aspects of the use of e-learning within the university. These aspects (areas) are:

1. University strategies in the integration of ICT in teaching & learning
2. Evolution of university libraries in their support of e-learning
3. Management of IPR of digital learning materials
4. Support for teaching staff in their use of e-learning
5. Support for students for e-learning
6. Design of online courses

How long will each peer review last?

Each visit will need 2 full working days

The period for the visits is from March to June 2006 inclusive to allow enough time to accommodate the 6 visits, write reports before the summer vacations etc.

However, the Peer Review will take place in three stages:

- A Preparatory stage (countdown: one month before the visit) – this will entail gathering background information about your institution, and its current and future planned use of e-learning. An important part of this information gathering is the 'Positioning Questionnaire', presented below, which should be completed by someone in your University who is well informed about these issues, and sent back to the MASSIVE team prior to the site visit. We are also asking for relevant documents that will help us build a picture of how your University approaches e-learning. These should also be sent to the MASSIVE team prior to the site visit.
- A Site Visit (2 working days) – which will involve a collaborative dialogue between the MASSIVE peer reviewers and a range of representatives of the University. The visit will provide an opportunity for the reviewers to gather more information, through interviews and observation, and for both reviewers and 'host institution' to explore key issues relevant to e-learning strategies.
- An Analysis and Reporting stage (one month after the visit))– on the basis of the data gathered from the preceding stages, this final part of the Review process will focus on the production of recommendations arrived at through collaborative reflection between the MASSIVE team and the hosting institution.

How many Universities will be peer reviewed and when?

6 universities following the timing below:

University	Peer visit Dates
Edinburgh	1-2 March 2006
Barcelona	13-14 March 2006
Granada	16-17 March 2006
Budapest (Szolnok college)	28-29 March 2006
Erlangen	10-11 May 2006
Bergen	25-26 May 2006

Who will come to the peer review?

4 persons will be attending each peer review visit: a representative from the host institution, a team chair (Dr. Jeff Haywood or Dr. Konrad Morgan, leaders of the peer review in the frame of the MASASIVE project) and 2 team members from the MASSIVE partnership, as follows:

University	Host	Team chair	Team member 1	Team member 2
Edinburgh	*Jeff Haywood*	Konrad Morgan from the University of Bergen	Claudio Dondi from Scienter	Andras Szücs from the Budapest University of Technology and Economics
Barcelona	*Mario Barajas*	Konrad Morgan from the University of Bergen	Isabel Pérez from the University of Granada	Amrei Tenckhoff from the University of Erlangen Nuremberg
Granada	*Isabel Pérez*	Konrad Morgan from the University of Bergen	Mario Barajas from the University of Barcelona	Madeleine Morgan from the University of Bergen
Budapest (Szolnok college)	*Denes Zarka*	Jeff Haywood from the University of Edinburgh	Walter Kugemann from the University of Erlangen Nuremberg	Denise Haywood from the University of Edinburgh
Erlangen	*Walter Kugemann*	Jeff Haywood from the University of Edinburgh	M. Begoña Arenas from Scienter España	Paul Sire from the Spanish Digital Society of Authors and editors
Bergen	*Konrad Morgan*	Jeff Haywood from the University of Edinburgh	Joe Cullen from the Tavistock Institute	Annemie Boonen froim Europace

What is the role of host Universities during this peer review process?

Host Universities must:

- Ensure that university senior management are aware of, and involved in, review process
- Provide team in advance with documentary evidence to read – or summaries if language problems
- Help with choice of accommodation and travel if needed (hotel names, maps etc)
- Provide visits to university facilities if appropriate
- Provide room and services for visiting team – help with internet access for example
- Arrange for team to meet sample of staff and students of university so that they can discuss service area provision with them, and brief these individuals as to the reason for and process of the visit
- Help with provision of translations where necessary of vital documentation – this is clearly onerous and so will need to be negotiated between the visit team and the host.

What is the role of peer reviewers during this peer review process?

Visiting team of peer reviewers must:

- Ensure that host university is aware of team composition and arrive/leave times
- Ensure that host university has questions well in advance and engage with them on any concerns and queries
- Carry out visit in an informal and friendly manner – this is not a criticism process but a supportive / formative process – in English this is called 'critical friend'
- Good and extensive notes will need to be taken – it may be useful to record all meetings and interviews for later reference – to ensure an accurate report is written. Responsibility for this should be decided within the team
- In the early visits, the instruments may need to be modified and refined for later visits to improve their effectiveness
- At end of visit give quick verbal overview summary of findings to close visit in a visible manner
- Write report from visit within 4 weeks of visit, send draft to host university for factual corrections within 2 weeks, and then complete final version of report within 4 more weeks
- The report will become a public document and so should not attribute names of people to comments or quotations, and must respect confidentiality of participants and the university as necessary.

Do you have any other question? Please, do not hesitate to contact us
(introduce email of contact person from the peer review team)

6. DATA COLLECTION TOOLKIT

6.1 Briefing Meeting

The purposes of the meeting are:

- To introduce the Review team to the hosting institution
- To confirm the previously agreed Review Plan and discuss any changes to the plan
- To clarify and expand any issues arising from the 'positioning questionnaire' and documents previously sent by the University.

The tools required for this meeting are as follows:

- The completed Positioning Questionnaire (Section 4.2.1 above)
- The completed Documents Checklist (Section 4.2.2. above)
- The completed Logistics Checklist (Section 4.2.3 above)

As an aid to Discussion, the Table below- Briefing Meeting Checklist -should be completed prior to the meeting. It should identify specific issues that need to be discussed.

Briefing Meeting Checklist

Element	Issues for Discussion
Positioning Questionnaire	
Documents	
Logistics	

6.2 Interview Schedule: Teaching Staff

Name of Interviewee:
Role/Job title in institution:

1. AREA 2: EVOLUTION OF UNIVERSITY LIBRARIES

1.1 Diagnostic Questions

Apart from given access to digital and non digital bibliographic resources and information, does the
library offer any other services?

Is the web interface of the library intuitive and easy to use?

Can users access the library services online when they are off-campus?

Are there any online guides and FAQs to support the users in their search for resources and information?

Does the library offer any support on the use of IT to the users? If so, what kind?
Are there any online communication channels to increase feedback among users?

1.2 Beanchmarking Questions

Are measures of convergence of computing and library services. Used?

How useful and effective would you say are the guides, FAQs, manuals and any other documentation on how to use the services, especially IT facilities?

How useful and effective is the support and training plan for the users of the library services?.

3.3 Good Practice Examples

What would you say is good about the use of technology to support library services in this institution?

What aspects of the library services need to be improved?

2. AREA 3: INTELLECTUAL PROPERTY RIGHTS MANAGEMENT FOR DIGITAL LEARNING MATERIALS

2.1 Diagnostic Questions

How aware are you of the legal, technical and management issues that are required for dealing with copyright IPR, especially those that are specifically brought about by the digital e-learning environment?

2.2 Strategic Questions

How is the IPR strategy being implemented in terms of contractual terms for staff? Are there formal contracts covering such things as moral and/or commercial rights, articles & books vs online texts, re-editing, licensing etc?

Are you satisfied with the contractual terms being offered?

2.3 Operational Questions

How is the IPR strategy being implemented in terms of contractual terms for staff? Are there formal contracts covering such things as moral and/or commercial rights, articles & books vs online texts, re-editing, licensing etc?

Are you satisfied with the contractual terms being offered?

Are you acquainted with the legal rights and obligations required for handling copyright materials?

Are you able to use the correct soft and hardware tools for managing and protecting copyright content? (Metadata, Digital Rights Management, Content Management Systems, etc.)

To what extent is there any publication (or sharing) of content and how is it managed?

Are there any IPR management procedures or systems in place?

2.4 Benchmarking Questions

What measures are available of the extent of use of (recent) internal and external contractual documents, publishing or sharing agreements and IPR management and protection tools (DRMs, etc,).

2.5 Good practices

What would you say is good about how the University handles IPR issues?

What aspects of IPR need to be improved?

3. AREA 4: SUPPORT FOR STAFF IN E-LEARNING

3.1 Diagnostic Questions

Have you been provided with training to cope with the introduction of new technology

How would you rate your existing IT skills?

What would you say are the existing IT skill gaps among teaching staff?

Is there a formal mechanism to support development of IT skills among staff?

What changes does the introduction of eLearning bring to the University's teaching and learning
models?

What didactic and pedagogical materials/resources and services are needed to improve teacher's skills in order to perform and act in new IT learning and eLearning scenarios?

How do educators receive training in how to adapt their traditional class materials into digital formats?

What resources are available or required for the provision of courseware designers?

Are there any needs for education in Instructional Design?

Is there any provision for technical support to teachers during lectures or broadcasts?

Are any E Learning competence certification schemes for staff and educators in place?

3.2 Benchmarking Questions

How useful and effective have been the training programmes to induct staff into the use of ICTs?

How useful and effective is the technical support provided for staff?

3.3 Good Practices

In what ways has the provision of technical support improved teaching practices and outcomes?

In what ways could technical support to staff be improved?

4. AREA 5: SUPPORT FOR STUDENTS IN E-LEARNING

4.1 Diagnostic Questions

What would you say are the main student needs and expectations for use of e-learning?

4.2 Operational Questions

When does support for e-learning begin (before, on arrival, during programmes)? Does it continue after departure?

- Which units support students in their use of e-learning?
- What services do they offer?
- What form do these services take (self-help, email, phone, personal etc)
- How do they evaluate their services?
- How do they plan for and resource their services in the future, taking into account student need?

To what extent are informal supports to students through tutors and teaching staff taken into account and supported?

4.3 Good Practices

What would you say is good about how students are supported in e-learning within this institution?
How could this type of support be improved?

5. AREA 6: DEVELOPMENT OF ONLINE COURSES

5.1 Diagnostic Questions

What kind of e-learning activities does your institution offer?

Which is the e-Learning platform(s) or/and Learning Management System(s) in use to deliver those courses?

Do you think that your university's range of e-learning developments is complete?

5.2 Strategic Questions

Does your institution have a strategy or methodology when designing online courses?

5.3 Operational Questions

What is the role of teachers in the process of designing and implementing e-learning courses?

5.4 Benchmarking Questions

Are measures of quality assurance of the courses and materials used in the University?.

Are guides and manuals on how to design online materials provided?

5.5 Good Practices

What would you say is good about how your University approaches on-line course design?

What aspects of on-line course design could be improved?

6.3 Interview Schedule: Technical Support Staff

Name of Interviewee:
Role/Job title in institution:

1. AREA 2: EVOLUTION OF UNIVERSITY LIBRARIES

1.1 Diagnostic Questions

Apart from given access to digital and non digital bibliographic resources and information, does the library offer any other services?

Is the web interface of the library intuitive and easy to use?

Can users access the library services online when they are off-campus?

Are there any online guides and FAQs to support the users in their search for resources and information?

Does the library offer any support on the use of IT to the users? If so, what kind?

Are there any online communication channels to increase feedback among users?

1.2 Benchmarking Questions

Are there measures of convergence of computing and library services.

How useful and effective would you say are the guides, FAQs, manuals and any other documentation on how to use the services, especially IT facilities?

How useful and effective is the support and training plan for the users of the library services?.

1.3 Good Practices

What would you say is good about the use of technology to support library services in this institution?

What aspects of the library services need to be improved?

2. AREA 3: INTELLECTUAL PROPERTY RIGHTS MANAGEMENT FOR DIGITAL LEARNING MATERIALS

2.1 Diagnostic Questions

How aware are you of the legal, technical and management issues that are required for dealing with copyright IPR, especially those that are specifically brought about by the digital e-learning environment?

2.2 Operational Questions

How is the IPR strategy being implemented in terms of contractual terms for staff? Are there formal contracts covering such things as moral and/or commercial rights, articles & books vs online texts, re-editing, licensing etc?

Are you satisfied with the contractual terms being offered?

Are you acquainted with the legal rights and obligations required for handling copyright materials?

Are you able to use the correct soft and hardware tools for managing and protecting copyright content? (Metadata, Digital Rights Management, Content Management Systems, etc.)

To what extent is there any publication (or sharing) of content and how is it managed?

Are there any IPR management procedures or systems in place?

2.3 Benchmarking Questions

Are there measures of extent of use of (recent) internal and external contractual documents, publishing or sharing agreements and IPR management and protection tools (DRMs, etc,).

2.4 Good Practices

What would you say is good about how the University handles IPR issues?

What aspects of IPR need to be improved?

3. AREA 4: SUPPORT FOR STAFF IN E-LEARNING

3.1 Diagnostic Questions

Have you been provided with training to cope with the introduction of new technology

How would you rate your existing IT skills?

What would you say are the existing IT skill gaps among teaching staff?

Is there a formal mechanism to support development of IT skills among staff?

What changes does the introduction of eLearning bring to the University's teaching and learning models?

What didactic and pedagogical materials/resources and services are needed to improve teacher's skills in order to perform and act in new IT learning and eLearning scenarios?

How do educators receive training in how to adapt their traditional class materials into digital formats?

What resources are available or required for the provision of courseware designers?

Are there any needs for education in Instructional Design?

Is there any provision for technical support to teachers during lectures or broadcasts?

Are any E Learning competence certification schemes for staff and educators in place?

3.2 Benchmarking Questions

How useful and effective have been the training programmes to induct staff into the use of ICTs?

How useful and effective is the technical support provided for staff?

3.3 Good Practices

In what ways has the provision of technical support improved teaching practices and outcomes?

In what ways could technical support to staff be improved?

4. AREA 5: SUPPORT FOR STUDENTS IN E-LEARNING

4.1 Diagnostic Questions

What would you say are the main student needs and expectations for use of e-learning?

4.2 Strategic Questions

Is there a strategy that guides e-learning support for students?

Where does responsibility for e-learning support to students reside?

4.3 Operational Questions

When does support for e-learning begin (before, on arrival, during programmes)? Does it continue after departure?

- Which units support students in their use of e-learning?
- What services do they offer?
- What form do these services take (self-help, email, phone, personal etc)
- How do they evaluate their services?
- How do they plan for and resource their services in the future, taking into account student need?

To what extent are informal supports to students through tutors and teaching staff taken into account and supported?

4.4 Good Practice

What would you say is good about how students are supported in e-learning within this institution?

How could this type of support be improved?

5. AREA 6: DEVELOPMENT OF ONLINE COURSES

5.1 Diagnostic Questions

What kind of e-learning activities does your institution offer?

Which is the e-Learning platform(s) or/and Learning Management System(s) in use to deliver those courses?

Do you think that your university's range of e-learning developments is complete?

5.2 Strategic Questions

Does your institution have a strategy or methodology when designing online courses?

5.3 Operational Questions

What is the role of teachers in the process of designing and implementing e-learning courses?

5.4 Benchmarking Questions

Are measures of quality assurance of the courses and materials used in the University?.

Are guides and manuals on how to design online materials provided?

5.5 Good Practice

What would you say is good about how your University approaches on-line course design?

What aspects of on-line course design could be improved?

6.4 Interview Schedule: Students

Name of Interviewee:
Status (undergrad/postgrad)
Course(s) studying:

1. AREA 2: EVOLUTION OF UNIVERSITY LIBRARIES

1.1 Diagnostic Questions

Apart from given access to digital and non digital bibliographic resources and information, does the library offer any other services?

Is the web interface of the library intuitive and easy to use?

Can users access the library services online when they are off-campus?

Are there any online guides and FAQs to support the users in their search for resources and information?

Does the library offer any support on the use of IT to the users? If so, what kind?

1.2 Examples of Good Practice

What would you say is good about the University's use of technology to support library services?

What things could be improved?

2. AREA 3: INTELLECTUAL PROPERTY RIGHTS MANAGEMENT FOR DIGITAL LEARNING MATERIALS

2.1 Operational Questions

Have you been informed of your legal rights and obligations when handling copyright materials?

2.2 Benchmarking questions

Have you used any guidelines or help on IPR?

2.3 Examples of Good Practice

What would you say is good about how the University handles IPR issues?

What things regarding IPR need to be improved?

3. AREA 5: Support for students in e-learning

3.1 Diagnostic Questions

For what aspects of your University education do you think e-learning would be useful ?

3.2 Strategic Questions

Have you or fellow students participated in strategies developed by the University to plan and implement e-learning?

3.3 Operational Questions

When does support for e-learning begin (before, on arrival, during programmes)? Does it continue after departure?

- Which units support students in their use of e-learning?
- What services do they offer?
- What form do these services take (self-help, email, phone, personal etc)
- How do they evaluate their services?
- How do they plan for and resource their services in the future, taking into account student need?

To what extent are informal supports to students through tutors and teaching staff taken into account and supported?

3.4 Examples of Good Practice

What would you say is good about how students are supported in e-learning within this institution?

How could this type of support be improved?

6.5 Focus Group: Teaching Staff

Number in group:
Roles in institution:

Themes Covered (tick boxes)

2. Evolution of university libraries in their support of e-learning	
3.Management of IPR of digital learning materials	
4. Support for teaching staff in their use of e-learning	
5. Support for students for e-learning	
6. Design of online courses	

1. Theme (number/title):

1.1 Diagnostic
How would you say this aspect of e-learning is currently viewed within the institution's overall mission and purposes?

1.2 Strategy
What are the strategies and resources available to your institution to enable it to carry out this vision of e-learning?

1.3 Operational
How are these strategies put into practice and resources used?

1.4 Benchmarking
What methods and tools are used to assess these operational practices and what are the main outcomes and impacts of e-learning in terms of this aspect?

1.5 Good practices
What is good about your institution's use of e-learning with regard to this aspect and what needs to be improved?

6.6 Focus Group: Technical Support Staff

Number in group:
Roles in institution:

Themes Covered (tick boxes)

2. Evolution of university libraries in their support of e-learning	
3.Management of IPR of digital learning materials	
4. Support for teaching staff in their use of e-learning	
5. Support for students for e-learning	
6. Design of online courses	

1. Theme (number/title):

1.1 Diagnostic
How would you say this aspect of e-learning is currently viewed within the institution's overall mission and purposes?

1.2 Strategy
What are the strategies and resources available to your institution to enable it to carry out this vision of e-learning?

1.3 Operational
How are these strategies put into practice and resources used?

1.4 Benchmarking
What methods and tools are used to assess these operational practices and what are the main outcomes and impacts of e-learning in terms of this aspect?

1.5 Good practices
What is good about your institution's use of e-learning with regard to this aspect and what needs to be improved?

6.7 Focus Group: Students

Number in group:
Type (undergrad/postgrad)
Courses studied:

Themes Covered (tick boxes)

2. Evolution of university libraries in their support of e-learning	
3.Management of IPR of digital learning materials	
4. Support for teaching staff in their use of e-learning	
5. Support for students for e-learning	
6. Design of online courses	

1. Theme (number/title):

1.1 Diagnostic
How would you say this aspect of e-learning is currently viewed within the institution's overall mission and purposes?

1.2 Strategy
What are the strategies and resources available to your institution to enable it to carry out this vision of e-learning?

1.3 Operational
How are these strategies put into practice and resources used?

1.4 Benchmarking
What methods and tools are used to assess these operational practices and what are the main outcomes and impacts of e-learning in terms of this aspect?

1.5 Good practices
What is good about your institution's use of e-learning with regard to this aspect and what needs to be improved?

6.8 Observation guideline

This schedule is to be used to record the process and outcomes of direct observation of teaching/learning/support activities involving ICTs. The medium is free text, but is structured in terms of a number of key dimensions.

6.8.1 Themes Covered in observed activity (tick boxes)

2. Evolution of university libraries in their support of e-learning	
3.Management of IPR of digital learning materials	
4. Support for teaching staff in their use of e-learning	
5. Support for students for e-learning	
6. Design of online courses	

6.8.2 Diagnostic/Strategic: Setting, Boundaries and Learning arrangements

1 Description of the environment

- (totally on-line; video-conferencing; on-campus etc.)

2 Characteristics of participants.

- Number involved in this observed activity.
- Broad socio-cultural characteristics (socio-economic status; ethnicity)
- Special target groups? (e.g. long term unemployed)
- Existing e-skills levels/qualifications?

3 Pedagogic arrangements/approaches.

- Describe the type of learning/management/support that is taking place.
- Describe how interaction between the participants is organised.
- Describe the approach used (e.g. traditional didactic –teacher/student; participatory; tutoring; mentoring)
- Who is mediating or providing learning? (e.g. professional instructors; people from the community)
- What learning materials/tools/support are used? (e.g. conventional texts; on-the-job; role playing)
- What are the main aims and objectives of the activity?
- How are participants encouraged to participate (motivational factors)
- How often does this activity take place? (e.g. uniquely; at certain intervals; daily)
- In what ways is it linked to other activities within the same case study?

6.8.3 Operational: how e-learning is delivered by the activity

Record your observations of the activity. This should include:

- Over what period the activity was observed.
- The main 'critical incidents' (what were the starting conditions? How did it end? Any particular events or incidents that were significant or interesting with regard to theme(s) studied?)
- Observed modes of interaction (e.g style of group working; leadership; decision-making
- Any tensions, problems that occurred (what are the main barriers and obstacles to e-learning? Were there group tensions between different actors?

6.8.4 Benchmarking: Outcomes

- In what ways did the participants benefit from their experience?
- *What were the specific learning outcomes? (what did they think they learned?)*
- *How useful was the experience and in what ways was it useful?*
- Is there any evaluation available of the learning outcomes of the activity?
- What do the participants themselves feel they get out of the activity?
- What is 'value added' of virtualisation?

6.8.5 Good practices

- What examples of innovative practices could be identified in relation to the theme(s) studied?
- What aspects for improvement could be identified?

6.9 De-briefing meeting

The purposes of the meeting are:

- To provide preliminary feed back to the hosting institution on some of the key emergent findings of the Peer Review
- To reflect on similarities and divergences between the Reviewer's emergent findings and the perceptions of the hosting institution
- To discuss and agree on forthcoming 'Key Actions', covering any issues the hosting institution wishes to emphasise
- To agree on a provisional structure and timetable for issue of the Peer Review Report and Recommendations

The tools required for this meeting are as follows:

- The 'Key Emergent Findings' checklist. This should be completed by the Review Team, following a reflective team meeting, and presented to the hosting institution
- The De-briefing Report. This should be completed by the Review Team following the meeting and should focus on similarities and divergences between the Reviewer's emergent findings and the perceptions of the hosting institution
- The 'Key Actions' checklist. This should be completed by the Review Team following the meeting and should include action points, an provisional outline of the topics to be covered in the Review Report and a timetable for production of the Report.

Emergent Findings Checklist

Theme	Key Findings
1. University strategies in the integration of ICT in teaching & learning	
2. Evolution of university libraries in their support of e-learning	
3.Management of IPR of digital learning materials	
4. Support for teaching staff in their use of e-learning	
5. Support for students for e-learning	
6. Design of online courses	

Debriefing Report

Theme	Key Findings	Hosting Institution View
1. University strategies in the integration of ICT in teaching & learning		
2. Evolution of university libraries in their support of e-learning		
3.Management of IPR of digital learning materials		
4. Support for teaching staff in their use of e-learning		
5. Support for students for e-learning		
6. Design of online courses		

Key actions checklist

Element	Action	Timing/Participants
Report focus and structure		
Reporting process		
Other actions		

7. ANALYSIS AND REPORTING

7.1 Data collection data

Please give details of the themes covered and the data collected with regard to each theme. Specify which of six areas covered by the positioning questionnaire; the documents acquired; the number of interviews and focus groups covered, together with type of respondents and number and type of observations carried out.

Theme	Preparatory Stage		Field Visit		
	Thematic Q.	Documents	Interviews	Focus Groups	Observation
1. University strategies in the integration of ICT in teaching & learning					
2. Evolution of university libraries in their support of e-learning					
3.Management of IPR of digital learning materials					
4. Support for teaching staff in their use of e-learning					
5. Support for students for e-learning					
6. Design of online courses					

7.2 Data Analysis

Four types of data will be collected through the Peer review process:

- Descriptive/Nominal (data derived from questions that simply elicit a factual response e.g. Which is the e-Learning platform or/and Learning Management System in use to deliver courses)
- Dichotomous (data derived from 'checklist' questions, implying a simple 'yes' or 'no' e.g. Does the library management team have a specific strategy to adapt its traditional services to the new pedagogical and technological factors?)
- Numeric/scaleable (data derived from questions that can be quantified on a mathematical scale) e.g. How aware are the University management and staff of the legal, technical and management issues that are required for dealing with copyright IPR)
- Interpretive/normative (data derived from questions that focus mainly on 'opinion's and 'values' and which require someone to interpret the response) e.g. what pressures are currently shaping e-learning in the hosting institution?

These different forms of data broadly correspond to specific data collection tools (or sections of tools) used in the Handbook, as shown in the Table below:

Data Type	Derived from
Descriptive/Nominal	'Diagnostic' section of positioning questionnaire 'factual' information from documents and archives
Dichotomous	Strategic, operational sections of positioning questionnaire
Numeric	Rating scales used in strategic, operational sections of positioning questionnaire Benchmarking sections of positional questionnaire
Normative/Interpretive	All data collection tools

The following Guidelines are intended to help make sense of these different kinds of data.

7.2.1 Descriptive Data

Needs to be extracted by inspection of i) the documents made available by the hosting institution ii) the diagnostic section of the positioning questionnaire. The process requires a systematic inspection for each of the six thematic areas of the examples of documents provided and the results of the answers to each question item included under the 'diagnostics' section for each theme, as follows:

- Refer to the Document checklist (Section 4.2.2). Summarise the key facts for each theme as illustrated by these documents
- Transfer result to analysis grid (Section 7.3.2 below)
- Work through each item in the 'Diagnostic' section for each of the six themes covered in the Positioning Questionnaire in turn
- Summarise the key facts for each theme as illustrated by the answers to these diagnostic questions
- Transfer result to analysis grid (Section 7.3.2 below)

7.2.2 Dichotomous Data

Needs to be extracted from the Strategic and Operational sections of the positioning questionnaire. Each of the six themes incorporates a range of question items. As with descriptive data, the analysis requires a systematic inspection for each of the six thematic areas of the results of the answers to each question item, as follows:

- Work through each item in the 'Strategic' section for each of the six themes covered in the Positioning Questionnaire in turn
- Document the host institution's status for each item (by checking for the presence or absence of the item)
- Transfer results to analysis grid (Section 7.3.3 below)

7.2.3 Numeric data

Needs to be extracted from: i) factual information (e.g. size of institution) derived from documents provided by the hosting university ii) factual information derived from the 'university profile' (drawn from the case studies and the positioning questionnaire) iii) data from the rating scores assigned to 'strategic' and 'operational' questions on the positioning questionnaire iv) observation of on-line activities for example numbers of student users logged on to on-line course). These data need to be transferred to the relevant analysis grids (Section 7.3 below).

7.2.4 Interpretive data

Needs to be extracted from i) documents and archives supplied by the hosting institution ii) data recorded form observation of 'live' activities, as structured by the 'observation guideline' shown in Section 6.9 above iii) data recorded through interviews and focus groups (Section 6 above).

All these data require 'content analysis'. As outlined in the MASSIVE 'Methodology Report', content analysis takes the form of scanning or inspection of qualitative data, in terms of either a pre-determined or retrospectively applied structure. In the pre-determined case, the analyst will be looking for things like the frequency of occurrence of an item of content, and the ways in which the item reflects the six themes used in the Peer Review. In the retrospective case, the data are scanned without a pre-determined structure in order to build up a meaningful 'clustering' of the

frequency and type of elements discussed. A key aim of the exercise is then to build a 'map' of interconnections between the different content elements. A picture of the frequency and type of elements occurring can be built up manually (by inspection), or by computerised means (for example a commonly used method is to search text using a wordprocessor package like Word) or through using content analysis software (InVivo).

For both ex ante and ex post approaches the standard method – for both the initial design of classification frameworks and for analysis of the data themselves - is to use item analysis. Item analysis works by getting together a criterion group (which in this case, for practical purposes is likely to be the MASSIVE partners). They then work together to produce a structure (identifying key items or dimensions they think are important criteria in analysing the data) and, using this structure, individually assess the data by rating relevant items of text according to the dimensions agreed. Those items achieving consensus are retained and used to draw conclusions, and those items generating a wide degree of divergence are discarded. [1]

As a Guideline, the Table below suggests some key 'constructs' to use to analyse the data gathered during the Peer Review.

[1] For further details on analysis methods, see: 'Miles and Huberman' 'Qualitative Methods' (1998) ARTICULATE Guidelines on evaluating learning applications (Tavistock Institute, 1996). Ackroyd, Stephen and Hughes 'Data Collection in Context' (1981)

Content Analysis Construct Grid

Constructs	Examples
'e-learning vision'	Use of 'grand metaphors' in policy documents e.g. reference to 'student empowerment; 'cost-effectiveness'
'cultural logic' of e-learning platforms	Metaphors used to specify technical choices made e.g. 'virtual classroom'
pedagogic perspective	Metaphors used to summarise pedagogic philosophy e.g. 'self-managed learning'
organisational perspective	Metaphors used to summarise the approach to governance and human interaction e.g. 'collaborative working'
Economic perspective	Positions on costs and benefits expected e.g. use of term 'cost-effectiveness'
Stakeholder perspective	The terms in which 'other' groups are viewed by a particular group e.g. how students are perceived by managers in terms of their input to developing virtualisation
Thematic representation	The ways in which the discourses captured in documents, interviews, focus groups and observation reflect the six Review themes. A key task for the content analysis is to systematically record the frequency each item in the positioning questionnaire is referred to, and the opinions expressed and behaviours carried out with regard to each item.

The proposed procedure for content analysis of Peer review data is therefore as follows:

- Review Team carry out initial 'first pass' of data derived from documents, interviews, focus groups, observation
- Review Team decide on constructs to be used to classify data
- Review Team carry out second, systematic classification and analysis of data, either using 'item analysis' (manual analysis) or software, using the construct model
- Construct a Summary Table of the main results of the analysis (for example by producing a Table of the main 'discourses', 'themes' or issues' identified for each team, and by the constructs chosen
- Use the Summary Table to input to the Analysis Grids (Section 7.3 below)

7.3 Data Synthesis

This Section presents tools to enable the data gathered and analysed from the review to be systematically summarised and integrated into meaningful data sets, and to provide a coherent basis for subsequent interpretation of conclusions and recommendations. The tools take the form of the following 'grids':

- Profiling Grid – provides an 'at a glance' summary of the hosting institution profile in terms of its type, structural features and stage in the 'virtualisation life cycle'.
- Diagnostics grid – summarises the 'vision' of the hosting institution, i.e. the role of e-learning within the overall university 'mission', and examples or illustrations of how this is expressed in things like policy documents
- 'Strategic' and 'operational' grid – summarises the current implementation position of the institution on the six themes, together with key examples of implementation strategies and practices
- 'Strategic' and 'operational' summary chart – provides scores on implementation in the six themes
- Benchmarking grid – provides an assessment of the extent to which the hosting institution is implementing benchmarking practices and a summary of the outcomes of these practices
- 'Good practices' grid – summarises good practices and things that need to be improved within the hosting institution
- Triangulation grid – compares the results of the 'institutional perspective' of the hosting university (as derived from analysis of documents and positioning questionnaire) with the perspectives of key other stakeholders (staff and students) as derived from interviews, focus groups and observation. Enables 'divergences' in stakeholder positions to be identified and recorded

7.3.1 Profiling Grid

Dimension	Data source	Characteristics (specify status of university on grid dimensions)
Typology	Case study results	
Structural (size; student profile)	Case study results	
Stage in e-learning life cycle	Case study results Positioning Questionnaire (Area 1; Diagnostic)	
Status	Case Study results	
Current e-learning provision	Positioning Questionnaire (Area 1; Diagnostic)	
Planned e-learning provision	Positioning Questionnaire (Area 1; Diagnostic)	

7.3.2 Diagnostics Grid

Theme	Item	Key Issues (summarise main points form diagnostics analysis)
1. Strategies	Policy Drivers	
	Restructuring processes	
	e-learning role in 'mission'	
	Position in e-learning cycle	
	Intended e-learning future	
2. Libraries	Management	
	Criteria for selecting and acquiring resources	
	Other services	
	Online guides and FAQs	
	Staff support	
	Online communication channels	
	Assessment/evaluation	
3. IPR	Awareness	
4. Teacher support	Existing IT skills among educators	
	Skill gaps	
	Mechanism to support skills development	
	Changes to teaching and learning models	
	Didactic and pedagogical materials/resources and services needed	
	Training to adapt traditional class materials into digital formats	
	Resources for courseware designers	
	Needs for education in Instructional Design	
	Technical support to teachers during lectures or broadcasts	
	Training on how to identify, recognise and certificate competences	
	E Learning competence certification schemes	
5. Student support	Student needs and expectations	
6. On-line courses	e-learning activities offered	
	e-Learning platform(s) /LMS	
	e-learning developments complete	
	Future e-learning activities	
	Assessment of design process	

7.3.3 Strategic and Operational Grid

Theme	Formal strategy	Check (Yes/No)	Rating score	Key results
1. Strategies				
Strategic	Formal strategy			
Operational	Methods to check strategy implemented			
	Processes to put strategy into practice			
	Processes aware of strategy			
	Teaching and support staff understand strategy			
	Students understand strategy			
2. Libraries				
Strategic	Strategy to adapt traditional services new factors			
	Computing and library services coordinated			
	Plans to improve user's services			
	Procedure to support and to assess all library staff			
Operational	Library system using standards			
	Competencies actually available			
	Support/advice/competence needs perceived			
	Tools to assess the library services?			
3. IPR				
Strategic	Awareness legal, technical and management issues			
	Formal IPR Strategy publicly available			
	Responsibles in place for strategy			
	Policy concerning ownership rights of materials			
	Strategy for tradeable assets			
	Provision for strategy change			
Operational	Strategy implemented contractually			
	Formal contracts on commercial rights etc			

	IPR management systems in place			
	Students informed of legal rights and obligations			
4. Staff Support				
Strategic	Adoption of eLearning models			
	Implications on course design and implementation considered			
	Policies for correct and efficient use of technology			
	Promotional activities for non-traditional students			
	Recognition and certification of staff competence in IT			
	Support for self-assessment			
	Learning progression in place			
Operational	Teachers training in IT skills			
	Educator support in determining materials are available			
	Digital media resources function correctly			
	Resources to respond to student questions			
	Flexible deadlines of lifelong learners			
	Supports for non-traditional learners			
	Supports to develop and implement alternative credit accumulation			
5. Student Support				
Strategic	Is there a strategy that guides e-learning support for students?			
	Responsibility for e-learning support to students in place			
	Support resourced in university planning			
	Students enabled to make input			
Operational	Support life cycle (pre-entry to post graduation)			
	Dedicated support units			
	Evaluation of services			

	Future planning and resourcing			
	Informal supports to students			
6. Online course development				
Strategic	Does your institution have a strategy or methodology when designing online courses?			
	External evaluations			
	Course revision			
Operational	Dedicated section of University responsible for online course design			
	Phased design cycle			
	Designated main 'actors' involved in process			
	Involvement of teachers in process			
	Evaluation and accreditation			

Strategic and Operational Summary Chart

Theme	Strategic Checklist Score	Strategic Rating Score	Operational Checklist Score	Operational Rating Score
1.Strategies				
2.Libraries				
3.IPR				
4.Staff Support				
5.Student support				
6. On-line courses				
CUMULATIVE SCORES				

7.3.4 Benchmarking Grid

Theme	Summary of benchmarking results
1. Strategies	
2. Libraries	
3. IPR	
4. Staff Support	
5. Student Support	
6. Online courses	

7.3.5 Good Practices Grid

Theme	Good Practices	Gaps/Improvement areas
1. Strategies		
2. Libraries		
3. IPR		
4. Staff Support		
5. Student Support		
6. Online courses		

7.3.6 Triangulation Grid

Theme	Pos. Q. Results	Teaching Staff	Support Staff	Students	Divergence points
1.Strategies					
2.Libraries					
3.IPR					
4.Staff Support					
5.Student support					
6. On-line courses					

7.4 Conclusions and Recommendations

This Section of the Handbook provides:

- A summary of the overall approach
- Expected Outputs
- Methodology

7.4.1 Overall approach

Drawing conclusions and providing recommendations is essentially a synthesising, interpreting and communicating task. It needs to:

- Ensure that the data derived from the Peer Review Process is systematically represented and incorporated
- Provide as much 'objectivity' as possible in interpretation of results
- Represent the perspectives and 'constructions of reality' of different stakeholders. Each stakeholder group – policy-makers; managers; students and staff has a different 'voice'. In turn, data collection methods can sometimes work to make one voice – typically those with most power – speak louder than others. For this reason, it is important to ensure that the 'triangulation' element of the Peer Review (i.e. the data gathered from interviews, focus groups and observation) is compared with the 'official' picture and areas of divergence identified and their implications assessed

- Reflect collaboration with the hosting institution, and ensure their priorities are taken into account when making recommendations and on reporting

7.4.2 Expected outputs

The main output of the Peer Review process will take the form of a Peer Review Report. This should be structured as follows, but should reflect the outcomes of the De-Briefing Report and the expectations of the hosting institution:

1. Report Summary, outlining the contents of the Report and its main points
2. Methodology - summarising the approach used (as per this Handbook) and including a 'logistics' section (detailing the participants involved in the Review and the data sources used)
3. Results of the Data Analysis (reflecting the 'Analysis' section of this Handbook)
4. Recommendations – with a particular focus on the strategic and operational 'gaps' identified, together with guidance on how these might be addressed in the future.

7.4.3 Methodology

Producing the Report requires a combination of two things: an 'interpretive model' which allows for the results of data analysis to be integrated in order to reflect the aims and objectives of the review, and an operational procedure to put the model into practice.

Interpretive model

The proposed model draws on a number of conceptual and practice sources, including, in no particular order, interpretive and hermeneutic methods; formative evaluation and benchmarking. Put simply, the methodology involves an assessment of the 'goodness of fit' between four dimensions:

- The 'discursive' dimension, represented by the 'vision' for e-learning espoused by the hosting institution, and reflected in its policies
- The 'enabling' dimension, represented by the strategic infrastructure in place and the resources available to put into place its vision
- The 'operational' dimension, represented by the work practices actually incorporated in the institution to utilise its 'enabling capacity'
- The 'performance' dimension, represented by the measurable outcomes associated with these practices.

The essential task of the interpretive process is therefore to integrate the results of the analytic grids (outlined in the preceding section of this Handbook) in order to make a judgement on:

- The coherence of the institution's vision; the extent to which it reflects current state of the art in policy and practice; its likely achievability in terms of expectations; the 'expectancy-value' perspective (the ways in which values underpin expectations of e-learning)
- The extent to which the strategic infrastructure and resources available are likely to realise the vision – in terms of both 'external' baselines (i.e. the kind of infrastructure typically developed in similar institutions) – and 'internal' baselines – the degree to which it is 'fit for purpose' for the vision of the institution

- The adequacy of the current work practices in terms of delivering expected results and values
- What can be learned from evidence of the outcomes and impacts of current e-learning practices, and how this learning can be applied to assist the hosting university in achieving its expected position

A useful way of approaching the interpretive task is to systematically structure the data analysis results in terms of these five dimensions. An example could be as shown in the Table below.

Interpretation Grid

Dimension	Interpretive constructs	Key questions and analysis results
Discursive	Coherence of the vision Policy coherence State of the art Expectancy-values	What does content analysis of mission statements say? Is the vision consistent with current policy Is the e-learning model inadequate; consistent with; more innovative than e-learning pedagogic models What values underpin expectations? Are they clear; democratic; consistent with expectations?
Enabling	Comprehensiveness of strategy Consistency of strategy with vision	Does the strategy cover the vision and mission? Does it fit expectations?
Operational	External goodness of fit Internal goodness of fit	How do the rating scores on the six review aspects compare with similar institutions? What gaps can be identified?
Performance	Benchmarking profile Benchmarking outcomes	Are the measurement systems adequate? What gaps in implementation can be identified from analysis of benchmarking? What do the results of the good practice analysis say?

Operational procedure

The proposed procedure is as follows:

- Ensure that the Reviewers complete and document the 'de-briefing meeting' – the 'emerging findings checklist' and 'de-briefing report' should form the basis of an initial 'Reporting Plan' which should make clear what the hosting institution's expectations are; what form the Review Report should take and what is the timetable for the Report
- Reviewers carry out their own de-briefing session. This should further elaborate the Reporting Plan, and should include specification and elaboration of the 'Interpretive Model' and the constructs to be used
- Reviewers set location and date for 'Reflective Workshop'. The main objective of the Workshop should be to implement the Reporting Plan.
- Carry out Reflective Workshop. This should include another member of the MASSIVE team to act as a 'critical reviewer' of the procedures followed. The main outputs of the workshop should cover: structure of the Review Report; key findings and recommendations; proposals for delivery of report, including provision for feedback and consultation with host institution prior to finalisation of report.
- Delivery of Report and any presentational activity agreed.

MASSIVE PROJECT PARTNERSHIP

Led by the University of Granada (ES)

The partners of MASSIVE are:

FIM-new learning (DE)

Tavistock Institute (UK)

EuroPACE (BE)

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