



## Project Document Cover Sheet

Project Information			
<b>Project Acronym</b>	–		
<b>Project Title</b>	Developing personalisation for the Information Environment (2)		
<b>Start Date</b>	1 November 2007	<b>End Date</b>	2 July 2008
<b>Lead Institution</b>	Curtis+Cartwright Consulting Ltd		
<b>Project Director</b>	Matt Shreeve		
<b>Project Manager &amp; contact details</b>	Dr Max Hammond, Curtis+Cartwright Consulting Ltd, Surrey Technology Centre, Surrey Research Park, Guildford GU2 7YG		
<b>Partner Institutions</b>	–		
<b>Project Web URL</b>	–		
<b>Programme Name (and number)</b>			
<b>Programme Manager</b>	Jane Charlton		

Document Name			
<b>Document Title</b>	<i>Project Plan</i>		
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<b>Author(s) &amp; project role</b>	Max Hammond, Project Manager		
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<b>Access</b>	<input checked="" type="checkbox"/> Project and JISC internal		<input type="checkbox"/> General dissemination

Document History		
Version	Date	Comments
0.1	8/11/2007	Internal version for review
1.0	9/11/2007	Issued with minor updates



## JISC Project Plan

This project plan consists of the elements which were agreed during the initiation meeting on 7 November 2007.<sup>1</sup> Further detail on many aspects of the project is contained within the original ITT,<sup>2</sup> and Curtis+Cartwright's ITT response.<sup>3</sup>

### *Overview of Project*

#### 1. Background

Most major Internet sites use personal information to tailor the way that their sites are presented to users. The JISC provides or funds a range of services which are available online, and wishes to investigate how these services may be personalised for users. Many already offer some degree of customisation (where a user may choose elements of functionality to be displayed, for example), but there may be opportunities to personalise sites adaptively in a way which is transparent to the user. This may be based on information which is already known about the user (eg the institution they attend) or on information obtained by tracking user behaviour (eg which types of books they search for in a library catalogue).

Further details are contained within the response to the ITT

#### 2. Aims and Objectives

This study will scope how the JISC Information Environment (IE) may make use (or should be developed to make use) of adaptive personalisation in order to enhance the user experience. It will specifically consider the ways in which infrastructure established to support the UK Access Management Federation (the UK Federation) could support adaptive personalisation of JISC services, and the potential privacy and legal barriers to such use.

Further details are contained within the response to the ITT.

#### 3. Project Outputs

Reports:

- Interim report covering landscape study: Draft on 15 Feb 2008
- Final report: 2 July 2008

Other outputs:

- Briefing regarding demonstrators: Early May 2008

Further detail regarding internal outputs is contained within the detailed workpackage list in Appendix B.

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<sup>1</sup> *Developing Personalisation for the Information Environment 2 start-up meeting minutes*, by email 8 November 2007.

<sup>2</sup> *JISC Invitation to Tender: Developing Personalisation for the Information Environment (2)*.

<sup>3</sup> *CR319D001-1.0 – Proposal to the JISC: Developing personalisation for the Information Environment (2)*, Max Hammond and Matt Shreeve, 17 October 2007.

## 4. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Difficulty in identifying attendees for scenarios workshops.	1	3	3	Utilise expertise and contacts of JISC stakeholders, national datacentres, representative groups such as UCISA, and Curtis+Cartwright's contacts within HE and FE institutions.
Limited availability of stakeholders for interview or for workshops.	1	3	3	The timescale and degree of float for this project allows for flexibility in the arrangement of stakeholder engagement activities. Stakeholders will be identified and engaged as early as possible in the process.
Appropriate partners for the development of demonstrators cannot be identified.	3	4	12	During the conduct of the earlier phases of this study, stakeholder institutions and services will be considered (and potentially approached) regarding the possibility of conducting a demonstrator project. Any use-cases which do not have associated demonstrators will be clearly set out to facilitate issuing a call, if desired.
A consistent picture of privacy concerns cannot be identified.	5	1	5	Perceptions of privacy can vary strongly between individuals. It will be necessary to understand the "spread" of opinion, and to develop tools which cater for the range of views.
Proposed Curtis+Cartwright or Mindset Research staff are not available.	1	3	3	We have alternative staff with similar experience to replace or support Matt and Max. Mindset have access to a wide pool of associates.

## Detailed Project Planning

### 5. Workpackages

Appendix B contains more detail regarding these workpackages, full details are contained within the response to the ITT.

- 1: *Initiation*
- 2: *Landscape Study*
- 3: *Interim report*
- 4: *Student Perceptions*
- 5: *Scenarios*
- 6: *Use cases/demonstrators*
- 7: *Synthesis, Final report*

### 6. Evaluation Plan

The work will be evaluated using Curtis+Cartwright's internal quality assurance procedures,<sup>4</sup> as agreed with the JISC project manager at the initiation meeting. These include a formal planning

<sup>4</sup> CA003D001 Curtis+Cartwright Quality Assurance policy and procedures.  
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Contact: Dr Max Hammond (max.hammond@curtiscartwright.co.uk)

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meeting, formal internal peer and customer review of our work and outputs and a formal post-completion review. Outputs will be reviewed against the Terms of Reference and the desired outcomes as articulated in the ITT and the kick-off meeting.

## **7. Dissemination Plan**

The audience for dissemination is the JISC Executive, Services and Committees, and dissemination will be primarily through the delivery of the final report. Any important points identified during the project which may be appropriate for dissemination more widely will be disseminated *via* the JISC programme manager, who will liaise with JISC comms and marketing.

## ***Appendixes***

### **Appendix A. Project Budget**

The project budget is set out in detail within the ITT response, and is commercially sensitive.

## Appendix B. Workpackages



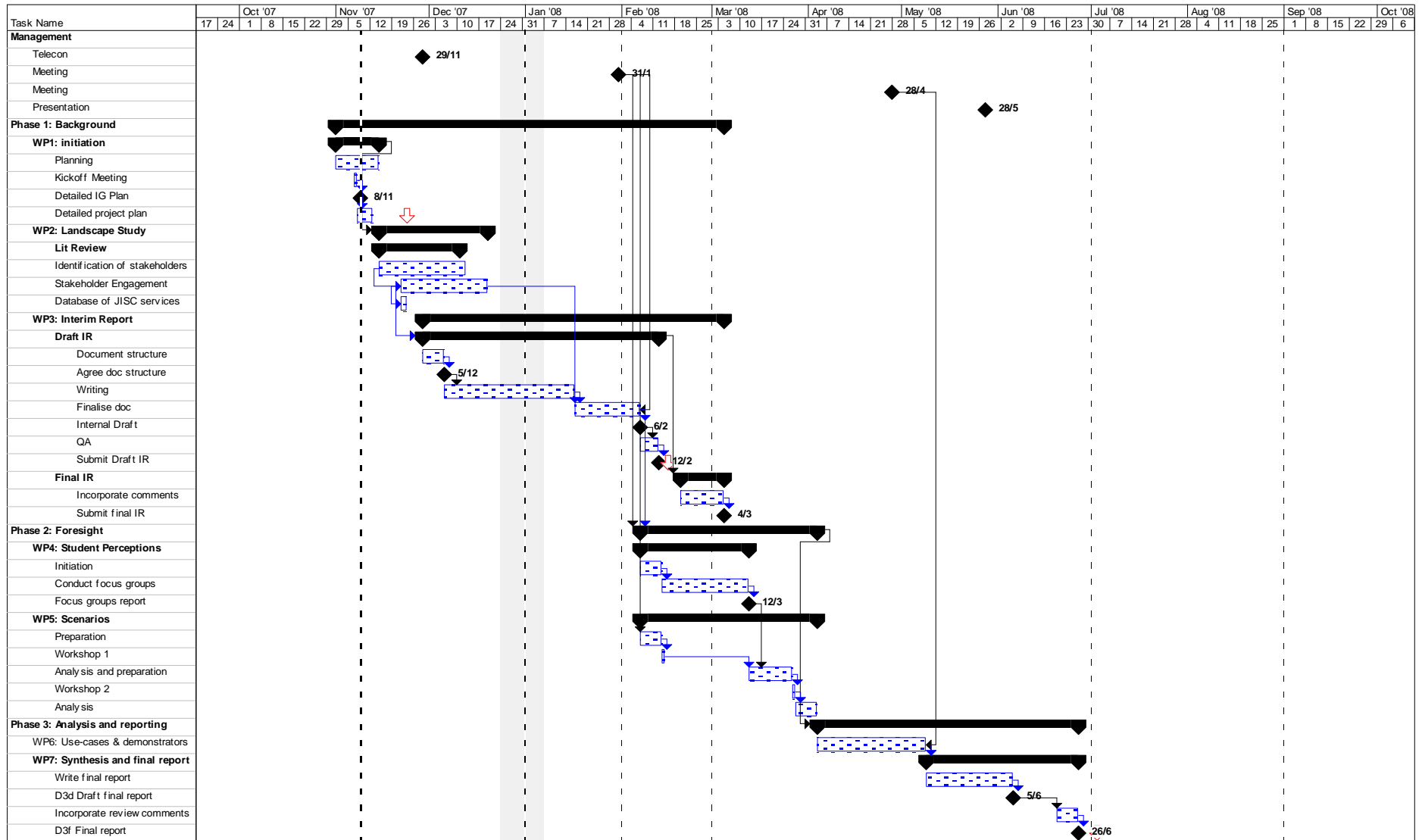
### JISC WORK PACKAGE

WORKPACKAGES	Month	1	2	3	4	5	6	7	8	9
1: Initiation		X								
2: Landscape Study		X	X							
3: Interim report			X	X						
4: Student Perceptions				X	X	X				
5: Scenarios					X	X				
6: Use cases/demonstrators							X	X		
7: Synthesis, Final report								X	X	X

Project start date: 1 November 2007

Project completion date: 2 July 2008

Duration: 9 months



Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
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<b>WORKPACKAGE 1: Initiation</b>					
<u>Objective:</u>					
1. Hold kick-off meeting	1/11/2007	7/11/2007	Hold kick-off meeting		C+C,JISC
2. Generate project plan	7/11/2007	23/11/2007	<b>Project plan consisting of elements agreed at kick-off meeting</b>		C+C
<b>WORKPACKAGE 2: Landscape study</b>					
<u>Objective:</u>					
3. Complete “literature review”	15/11/2007	10/12/2007	Synthesised information regarding JISC reports, International initiatives, specs and standards		C+C
4. Audit of personalisation within JISC services	15/11/2007	19/12/2007	Database of services and personalisation employed, planned or potential		C+C
5. Engage with all key stakeholders	22/11/2007	19/12/2007	Picture of current situation, identified attendees at scenarios workshops, initial scoping of potential demonstrator projects		C+C

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<b>WORKPACKAGE 3: Interim report</b>					
<u>Objective:</u>					
6. Write interim report	6/12/2007	15/2/2008	<b>Interim report presenting results of landscape study</b>	✓	C+C
<b>WORKPACKAGE 4: Student perceptions</b>					
<u>Objective:</u>					
7. Conduct focus groups to investigate student perceptions	7/2/2008	12/3/2008	Synthesised views of focus group attendees		Mindset
<b>WORKPACKAGE 5: Scenarios generation</b>					
<u>Objective:</u>					
8. Generate scenarios	7/2/2008	3/4/2008	2x workshops Scenario axes selection Complete rich-pictures	✓	C+C with JISC support

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<b>WORKPACKAGE 6: Use-cases and demonstrators</b>					
<u>Objective:</u>					
9. Develop and specify costed demonstrators and/or use-cases as appropriate	4/4/2008	26/6/2008	<b>Briefing to Balviar Notay in early May</b> Defined proposals for inclusion in final report		C+C
<b>WORKPACKAGE 7: Synthesis and final report</b>					
<u>Objective:</u>					
10. Synthesise outputs of earlier work packages	9/5/2008	5/6/2008	Input analysis for final report		C+C
11. Write final report	9/5/2008	2/7/2008	<b>Final report</b>	✓	C+C

Members of Project Team:  
 C+C: *Curtis+Cartwright Consulting Ltd*  
 Mindset: *Mindset Research Ltd*