

## Repositories and Preservation Proposal Cover Sheet

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|---|--|---|--|
| Cover Sheet for Proposals<br>(All sections must be completed)   |  | <i>JISC Capital Programme</i>   |  |
| Name of Capital Programme: Repositories and Preservation Programme  |  |   |  |
| Bid for Call Area : (Please tick ONE BOX ONLY, as appropriate)  |  |   |  |
| <b>Tools and Innovation (Strand B)</b>  |  |   |  |
| <input type="checkbox"/>  | Call Area I – Tools and Innovation Projects  | Please specify area of proposed project eg 'metadata generation and validation'   |  |
| <b>Discovery to Delivery (Strand C)</b>   |  |   |  |
| <input type="checkbox"/>  | Call Area II – Discovery to Delivery Projects  | <input checked="" type="checkbox"/> a) Version identification framework<br><input type="checkbox"/> b) Persistent identifier interoperability demonstrator<br><input type="checkbox"/> c) Federated access management and repositories<br><input type="checkbox"/> d) Semantic interoperability demonstrator    |  |
| <b>Repository Start-Up and Enhancement (Strand D)</b>   |  |   |  |
| <input type="checkbox"/>  | Call Area III – Repository Start-Up and Enhancement Projects                                   | <input type="checkbox"/> a) Repository start-up projects<br><input type="checkbox"/> b) Repository enhancement projects   |  |
| <b>Digital Preservation and Records Management (Strand H)</b>   |  |   |  |
| <input type="checkbox"/>  | Call Area IV – Digital Preservation and Records Management Projects                            | <input type="checkbox"/> a) Digital preservation across the lifecycle<br><input type="checkbox"/> b) Models and implementation of preservation services<br><input type="checkbox"/> c) Preservation tools development   |  |
| <b>Shared Infrastructure Services (Strand I)</b>  |  |   |  |
| <input type="checkbox"/>  | Call Area V – Shared Infrastructure Services Projects  | <input type="checkbox"/> a) Pilot implementation of licence registry<br><input type="checkbox"/> b) Pilot national name and factual authority service<br><input type="checkbox"/> c) Scoping an architecture to support digital policy management<br><input type="checkbox"/> d) Scoping a terminology registry |  |
| Name of Lead Institution:   |  | London School of Economics and Political Science  |  |
| Name of Proposed Project:   |  | Version Identification Framework (VIF)  |  |
| Name(s) of Project Partner(s):<br>Partner 1: Council for the Central Laboratory of the Research Councils<br>Partner 2: University of Leeds<br>Partner 3: Erasmus University Rotterdam |  |   |  |
| Full Contact Details for Primary Contact:   |  |   |  |
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|  |  |                        |
|--|--|------------------------|
| <b>Length of Project:</b> 10 months  |  |                        |
| <b>Project Start Date:</b> March 2007  | <b>Project End Date:</b> December 2007 |                        |
| <b>Total Funding Requested from JISC:</b> £109,252   |  |                        |
| <b>Funding Broken Down over Financial Years (April – March):</b>   |  |                        |
| <b>Apr06 – Mar07</b>   | <b>Apr07 – Mar08</b>                   | <b>Apr08 – Mar09</b>   |
| £10,995  | £98,258                                |                        |
| <b>Total Institutional Contributions:</b> £36,417  |  |                        |
| <b>Percentage Contributions over the Life of the Project:</b>  | <b>JISC</b><br>75%                     | <b>PARTNERS</b><br>25% |
| <b>Outline Project Description</b>   |  |                        |
| <p>The Version Identification Framework Project will conduct a requirements exercise through an online survey of researchers, teachers and learners and other stakeholders about current use of digital objects and about the versioning questions that arise in their management, storage, and use. The survey will cover all subject areas and a wide range of institutions.</p> <p>The results of the requirements exercise and of other related projects and initiatives in version identification will be used to inform a draft version identification framework. This framework will be developed from the draft through the mechanism of an expert working group to be convened during the project with a membership made up of the project partners and other key stakeholders such as repository service providers, repository managers and software developers, metadata experts and others.</p> <p>The Version Identification Framework will be taken forward and recommended to the JISC community and the digital repository community through a community acceptance plan and a dissemination campaign.</p> |  |                        |
| <b>I have looked at the example FOI form at Appendix A and included an FOI form in the attached bid (Tick Box)</b>   | <b>YES</b> ✓                           | <b>NO</b>              |
| <b>I have read the Circular and associated Terms and Conditions of Grant at Appendix B (Tick Box)</b>  | <b>YES</b> ✓                           | <b>NO</b>              |

# JISC Capital Call – Version Identification Framework (VIF) Project Proposal

Lead Institution: London School of Economics and Political Science (LSE)  
Partners: Council for the Central Laboratory of the Research Councils (CCLRC)  
University of Leeds (Leeds)  
Erasmus University Rotterdam (EUR)

## 1. Introduction

### 1.1 Outline

As digital repositories in the UK higher education community continue to develop beyond the pilot and project phase into mature mainstream service delivery, the focus for development work is moving towards enabling tools and frameworks for the successful linking of repositories. There is a need for guidelines and standards to be developed which will feed into the policies of both data providers (for example institutional repositories) and service providers (for example cross-repository search services and subject repositories). Version identification is one area which requires such a framework.

This project will build on and extend the work of two JISC-funded projects: the VERSIONS Project<sup>1</sup>, led by LSE and carried out under the JISC Digital Repositories Programme (JISC Circular 03/05), has looked in depth at version identification issues and user requirements for a specific subject discipline, economics, and for a specific type of research output, academic papers or eprints. Further work is required to extend knowledge of requirements in other disciplines and communities of practice and to identify requirements for version identification of other object types. The RIVER Scoping Study on Repository Version Identification<sup>2</sup> commissioned by the JISC Scholarly Working Group and led by Rightscom Ltd, with project partners LSE Library and Oxford University Computing Services, took a broad view of the landscape and clearly mapped the problem space. The RIVER Project Team recommended to JISC that further investigation of user requirements in this area take place and then a framework for identifying versions be developed. RIVER also recommended to institutional repositories that they develop policies and consider the use of workflow-based version management at the creation stage.

Other initiatives which will inform the work of the proposed project team include:

- The NISO/ALPSP Working Group on Versions of Journal Articles<sup>3</sup>, which has produced a set of detailed use cases to describe the time-based workflow of versions of journal articles from the point at which authors submit their manuscript to the publication in a refereed journal (and beyond, with web-based updating and comment) and has published a draft set of terms to describe each of the major revision stages of relevance to the publishing community. This work is still underway and the project team would expect to keep in close contact with this ongoing international standards work.
- The JISC-funded Eprints Application Profile Working Group, led by Julie Allinson (JISC and UKOLN) and Andy Powell (Eduserv Foundation), which has produced an application profile which has relevance for version identification, based as it is on the Functional Requirements for Bibliographic Records (FRBR) and the DCMI Abstract Model. This work is being taken up through a DC Task Group.

This project aims to address the recommendations of the RIVER Final Report and to be informed by the work of the other projects and initiatives, with a project team which draws on direct involvement with VERSIONS, RIVER, the NISO/ALPSP Working Group and the Eprints Application Profile Working Group. The project team is further strengthened by a partner with experience of digital images from the MIDESS Project and by a Dutch partner with experience from the DARE Metadata Working Group and knowledge of content versioning systems to underpin repository content.

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<sup>1</sup> <http://www.lse.ac.uk/versions>

<sup>2</sup> [http://www.jisc.ac.uk/uploaded\\_documents/RIVER%20Final%20Report.pdf](http://www.jisc.ac.uk/uploaded_documents/RIVER%20Final%20Report.pdf)

<sup>3</sup> [http://www.niso.org/committees/Journal\\_versioning/JournalVer\\_comm.html](http://www.niso.org/committees/Journal_versioning/JournalVer_comm.html)

The project work packages fall into three areas: further investigation of the user environment, work on the production of the framework and community interaction to enhance take-up.

All the partners of the project are committed to continuing their work in this important area. The spread of subject domains, covering humanities and social and physical sciences, supported by the partners enhances the understanding of the issues in more contexts.

## **1.2 Length of project**

The project will run for 10 months.

## **1.3 Proposed start date**

The proposed start date is March 2007.

## **1.4 Budget requested**

The budget requested from the JISC is **£109,252**. The institutional contribution from LSE and partners is estimated to be **£36,417**. The total project budget is estimated at **£145,669**

## **1.5 Summary of how the project will contribute to the programme**

The Version Identification Framework project proposal addresses Call Area II Discovery to Delivery and Repositories and Preservation Programme Strand C: Discovery to Delivery, Project a) Version identification framework.

The project will contribute to the JISC Repositories and Preservation Programme by providing a common infrastructure for the naming and understanding of issues relating to versions of scholarly works.

## **2. *Project description***

### **2.1 Description of intended project plan**

The project team will build on existing work and expertise of the partners in this area to provide a framework for the identification of versions of digital objects.

#### **2.1.1 Aims**

The aims of the project will be:

- To provide a framework for the identification of versions of digital objects in digital repositories
- To inform and support the work of other JISC projects and services in the area of digital repositories and preservation
- To disseminate the framework widely in order to achieve community acceptance

#### **2.1.2 Objectives**

Specific objectives of the project will include:

- Discovering how researchers, teachers, learners and others are using digital objects and managing their personal digital resources and summarising this in a report. (Work package 2)
- Discovering the range of digital objects used by researchers, teachers and learners and particularly the creation, revision, dissemination and storage processes that content creators go through as well as processes and workflows relating to sharing and re-use of digital content and summarised this in a report. (Work package 2)

- Investigating and reporting on the requirements of academic users of digital content for a version identification framework. (Work package 2)
- Sharing results and seeking feedback from international partners, for example in the DARE community and through the ARROW Project. (Work package 2 and 3)
- Producing a draft Version Identification Framework based on existing work in this area. (Work package 3)
- Gaining community acceptance by convening a working review group (Work package 4)
- Refining a Version Identification Framework based on the views of the working group (Work package 3)
- Ensuring that the work is disseminated as widely as possible. (Work package 5)
- The project is managed well and that the governance infrastructure works well. (Work package 1)

### **2.1.3 Track record and contributions of project partners**

#### **London School of Economics and Political Science (LSE)**

LSE has been the lead partner in the VERSIONS Project<sup>4</sup>, under the JISC Digital Repositories Programme. This is being conducted in partnership with the Nereus<sup>5</sup> Consortium of European economics research libraries. The VERSIONS Project has taken a close look at the use of one type of digital content (text based eprints with a focus on journal articles) in one subject discipline, economics, and at the attitudes and current practice of researchers towards creating, storing and disseminating different versions of their research outputs.

The Library is the largest social science library in the world and is well known to researchers for its outstanding collections. LSE's institutional repository, LSE Research Online<sup>6</sup>, has been live since 2005. It is based on the Eprints software. As a member of the SHERPA-LEAP Consortium, LSE has well-established links with the SHERPA network of repositories.

LSE will manage the project and will lead on the Version Identification Framework and with CCLRC on dissemination activities.

#### **Council for the Central Laboratory of the Research Council (CCLRC)**

Council for the Central Laboratory of the Research Council's institutional repository, ePubs<sup>7</sup>, has been live since May 2004. It is implemented in in-house software which uses the IFLA Functional Requirements for Bibliographic Records model as the conceptual basis, placing the notion of versions of a particular work at the centre. CCLRC supports subject domains such as Particle Physics with a strong culture of dissemination of multiple versions and is therefore both interested in and used to attempting to reconcile them. CCLRC has also supported the work of the NISO/ALPSP working group on Journal Article Versions<sup>8</sup> by providing a member of the working group. CCLRC are also involved in the CLADDIER<sup>9</sup> project, which aims to link data to publications and vice versa, versioning both of data and publications being a live issue. ePubs is an important part of the CCLRC Library and Information Service Strategic Plan 2006-2010 as CCLRC is heavily reliant on journals both for information retrieval and dissemination. Version identification is a strong strand of this strategic view.

CCLRC will lead on the community acceptance work and will lead with LSE on dissemination activities.

#### **University of Leeds (Leeds)**

The University of Leeds is one of the largest research Universities in the UK. It provides courses in all core disciplines to an increasingly diverse student body, a growing number of whom are recruited through flexible and lifelong learning initiatives as part of the widening participation agenda.

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<sup>4</sup> VERSIONS Project: Versions of Eprints – user Requirements Study and Investigation Of the Need for Standards. [www.lse.ac.uk/versions](http://www.lse.ac.uk/versions)

<sup>5</sup> Nereus [www.nereus4economics.info](http://www.nereus4economics.info)

<sup>6</sup> LSE Research Online <http://eprints.lse.ac.uk>

<sup>7</sup> ePubs <http://epubs.cclrc.ac.uk/>

<sup>8</sup> NISO/ALPSP Journal Article Versions working group  
[http://www.niso.org/committees/Journal\\_versioning/JournalVer\\_comm.html](http://www.niso.org/committees/Journal_versioning/JournalVer_comm.html)

<sup>9</sup> CLADDIER: Citation, Location and Deposition in Discipline & Institutional Repositories  
<http://claddier.badc.ac.uk/trac>

The University Library has a significant record of involvement in a wide number of relevant initiatives and projects. The University is currently leading the JISC-funded MIDESS Project, which is developing a digital repository infrastructure for images and multimedia. Leeds is partnering with the University of Birmingham, LSE and UCL in this respect. MIDESS has undertaken a detailed user requirements gathering exercise and Leeds would intend to build on this work, and on the user requirements work undertaken for the VERSIONS Project as part of WP2. The MIDESS user requirements analysis is available at: <http://www.leeds.ac.uk/library/midess/documents.html>.

The University is active in the development of the White Rose Consortium ePrints Repository, which was originally developed under the JISC-funded SHERPA Project, and is now being taken forward as a fully supported service. Leeds has built a strong and effective partnership with the other White Rose institutions based around this initiative and has been active in repository developments on a national level, such as providing input into the JISC-funded SHERPA-DP and STORE Projects. The University of Leeds is also the lead partner in the JISC-funded EVIE Project (funded under the Virtual Research Environments Programme). Leeds has built up effective and close working relationships with researchers, which will provide an additional strength for the Project.

Leeds will lead the Requirements exercise and will provide expertise in teaching and learning and digital images.

### **Erasmus University Rotterdam (EUR)**

Since 2001 EUR has employed a repository for its scientific output. In 2005 the repository project became a regular service within the University Library with a staff of 3.0 FTE, named RePub.

RePub<sup>10</sup> participates in the Dutch DARE programme under the Surf umbrella. As a DARE member, EUR took part in such projects as 'Cream of Science', Dissertations online. EUR will participate in the project by providing expertise and links with the DARE community, through membership of the project Steering Committee and of the Working Group on the Version Identification Framework. EUR is already a partner in the VERSIONS Project, through membership of Nereus.

In 2007 RePub will start to use custom software to manage the repository. One of the backbones of this software will be Subversion<sup>11</sup>, the open source version-control software. Also in 2007 RePub will expand its services in order to include so-called learning objects and datasets. It is within this context that EUR is very interested in participating in the Version Identification Framework.

Erasmus University Rotterdam will contribute expertise from the DARE community and of content versioning systems. EUR will not lead any work packages but will contribute as a member of the Steering Committee and of the expert Version Identification Framework Working Group. EUR will not be requesting funding for its work.

### **2.1.4 Overall approach**

The project team will conduct a requirements exercise of potential users of digital repositories in the early months of the project, to establish clearly what the requirements are for version identification. The requirements exercise will include an online survey with an invitation to respondents to provide their contact details if they are willing to be contacted for further information. The survey will ask researchers, teachers and learners and other stakeholders about current use of digital objects and about the versioning questions that arise in their management, storage, and use. The project will aim to gather responses from stakeholders in all subject areas and from a wide range of institutions. The project will also ensure that respondents are questioned about the full range of digital objects being created and used in the higher education community to ensure that versioning questions other than those arising from a workflow-based view of version identity come to light.

The results of the requirements exercise will be taken up in the next phase of the project, which will be to convene a working group of librarians, repository managers, repository software developers, metadata experts and others to work with the set of requirements to develop a framework for version identification. The project partners will join the working group. Contacts have also been made with the Intute Repositories Search Project and with the JISC Eprints Application Profile Working Group. Representatives from these two key stakeholders will be invited to join the Version Identification Framework Working Group. The project team will generate the first draft of this framework for discussion, based on their experience in this area and on the survey results. The activities of this working group will start with a kick-off meeting but it is expected

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<sup>10</sup> RePub <http://repub.eur.nl>

<sup>11</sup> <http://subversion.tigris.org/>

that thereafter the group will be able to communicate and work mostly via email and a project wiki. A wider review group will also be convened to assist with the process of feedback on the draft framework document. The project team will aim to use Unified Modelling Language (UML) diagram(s) to represent the key concepts in the version identification framework.

The remainder of the project will focus on implementing a community acceptance and take-up plan and on disseminating the Version Identification Framework. The community acceptance plan will involve liaising with repository software developers, with the Intute Search Service Project and with other key stakeholders. The project will organise a final open workshop to disseminate the framework among key stakeholders.

Dissemination activities will include writing articles, maintaining the project website and wiki, giving presentations, papers at conferences and workshops, and preparing a project poster and other promotional materials.

## 2.2 Timetable

The Version Identification Framework project will be delivered through five work packages:

|                       |  |
|-----------------------|--|
| <b>Work package 1</b> | <b>Project Management and Reporting</b>  |
| Objective:            | To manage the entire project and to ensure that the JISC Project Management guidelines are adhered to. To liaise with stakeholders   |
| Lead:                 | LSE  |
| Deliverables:         | Project Plan and Core Project Documents; formation of alliances with stakeholders; exit strategy   |
| Timescales:           | Months 1-10  |
| Issues:               | Recruitment of Project Manager and Project Officer   |
| <b>Work package 2</b> | <b>Requirements exercise</b>   |
| Objective:            | To design, carry out and report on a rigorous requirements exercise into use of desktops in research and learning; version identification issues relating to different digital objects: documents, data, images, learning objects; requirements for version identification among teachers, learners, researchers, information professionals and other stakeholders |
| Lead:                 | Leeds  |
| Deliverables:         | Online survey; publicity materials for the survey; report on requirements  |
| Timescales:           | Months 1-6   |
| Issues:               | Response rate to questionnaire   |
| <b>Work package 3</b> | <b>Version identification framework</b>  |
| Objective:            | To build and produce a framework for consistent identification of versions within digital repositories   |
| Lead:                 | LSE  |
| Deliverables:         | First draft of the version identification framework document; A working group of stakeholders convened; kick-off meeting and wiki; Version Identification Framework document   |
| Timescales:           | Months 4-10  |
| Issues:               | Availability and input of stakeholders; quality of requirements exercise results; UML skills   |
| <b>Work package 4</b> | <b>Evaluation and community acceptance</b>   |
| Objective:            | To work towards community acceptance and take-up of the Version Identification Framework; to evaluate the project and its tangible outputs   |
| Lead:                 | CCLRC  |
| Deliverables:         | Version Identification Framework Working group to evaluate requirements exercise results; community acceptance plan; Final project workshop on the Version Identification Framework; feedback from researchers and stakeholders on value of project outputs  |
| Timescales:           | Months 5-10  |
| Issues:               | Acceptance of the framework; reaching all interested stakeholders  |
| <b>Work package 5</b> | <b>Dissemination</b>   |
| Objective:            | To disseminate throughout the JISC community and beyond, the findings of the   |

|               |   |
|---------------|---|
|               | requirements exercise and the version identification framework developed  |
| Lead:         | LSE and CCLRC   |
| Deliverables: | Project website or wiki; Version Identification Framework wiki; contributions to mailing lists; articles; papers and presentations at workshops and conferences; publicity for final workshop on the Version Identification Framework |
| Timescales:   | Months 1-10   |
| Issues:       | Reaching all interested stakeholders  |

## 2.3 Deliverables

2.3.1 The tangible deliverables from the project will be:

- A Version Identification Framework for librarians, repository managers and other key stakeholders, describing how different digital objects should be identified within digital repositories and accompanied by graphics, illustrations and examples
- The framework will also address how best to identify versions of digital objects so that the identification remains clear when resources surface through other resource discovery channels such as internet search engines and cross-repository search services
- The questions used in the requirements exercise which will be made available publicly
- The results of the requirements exercise
- The core documents required of all JISC-funded projects

Intangible deliverables will include:

- Sharing of experience with the JISC community and internationally through contacts with DARE and ARROW (through the Nereus consortium which has EUR and Monash University among its members)
- Benefit to the project partners in terms of improving version identification in their own repositories
- Increased understanding of the requirements of all stakeholders for clear identification of versions of digital objects
- Coordination with other JISC-funded projects and services
- Contribution to the development of standards on versions

## 2.4 Risks

| Risk   | Probability (1-5) | Severity (1-5) | Score (P x S) | Action to Prevent/Manage Risk   |
|--|-------------------|----------------|---------------|---|
| Key project staff temporarily unavailable due to unplanned absence (illness, parental leave, etc)          | 2                 | 4              | 8             | Redefine or reduce non-core objectives, within existing budgets; consider secondment of other Library staff to project                                |
| Permanent or long-term unavailability of staff owing to recruitment problems, resignation or other reasons | 2                 | 5              | 10            | Documentation to enable transfer of work to replacement staff; redefine or reduce non-core objectives, with reduced budgets; negotiate time extension |
| Unacceptably low response rate to questionnaire  | 2                 | 5              | 10            | Incentive for respondents; careful scheduling; budget for publicity campaign; publicity and reminders   |
| Withdrawal of partners from participation in the project   | 1                 | 5              | 5             | Monitor/keep partners up to date with progress and benefits; redefine or reallocate work packages   |
| No common themes to be able to produce a coherent version identification framework                         | 2                 | 4              | 8             | Concentrate on areas of commonality and document areas where it is difficult to produce coherent framework.   |

## 2.5 Project Outcomes and their Value to the JISC community

The Version Identification Framework will form part of the overall framework for digital repositories required by the JISC in order to enable cross-repository services to develop. The Framework will feed into the work being carried out by the Intute Repositories Search Service and other service providers. The Framework will inform the development of the major open source repository software providers, some of which already have a versioning mechanism.

The outcome for researchers and learners will be a saving in time when searching for digital material. Evidence from the VERSIONS Project survey suggest that as many as 40% of researchers do not find it straightforward or quick to determine which version of a paper they need to consult. This issue is important for the question of accurate citation of others' work.

For higher education institutions and their repository managers, the outcome of the project will be a clear framework that can be translated into policy at the local level.

From the point of view of trust in digital repository content, the question of version identification is one that was raised by the RLG-OCLC report on Trusted Digital Repositories<sup>12</sup>. Accurate versioning information is related to the question of provenance of digital content and is an important component of trust.

## 2.6 IPR issues

The questionnaire will be produced using third party software, most likely, Bristol Online Surveys (BOS) <http://www.survey.bris.ac.uk/> and there are no IPR obstacles envisaged.

IPR in the Version Identification Framework itself and all project materials will remain with the project partners. The details will be clarified in the Consortium Agreement. The Framework and other deliverables will be made available to the JISC community in accordance with the JISC Project Management Guidelines and will also need to be available for use by all the project partners.

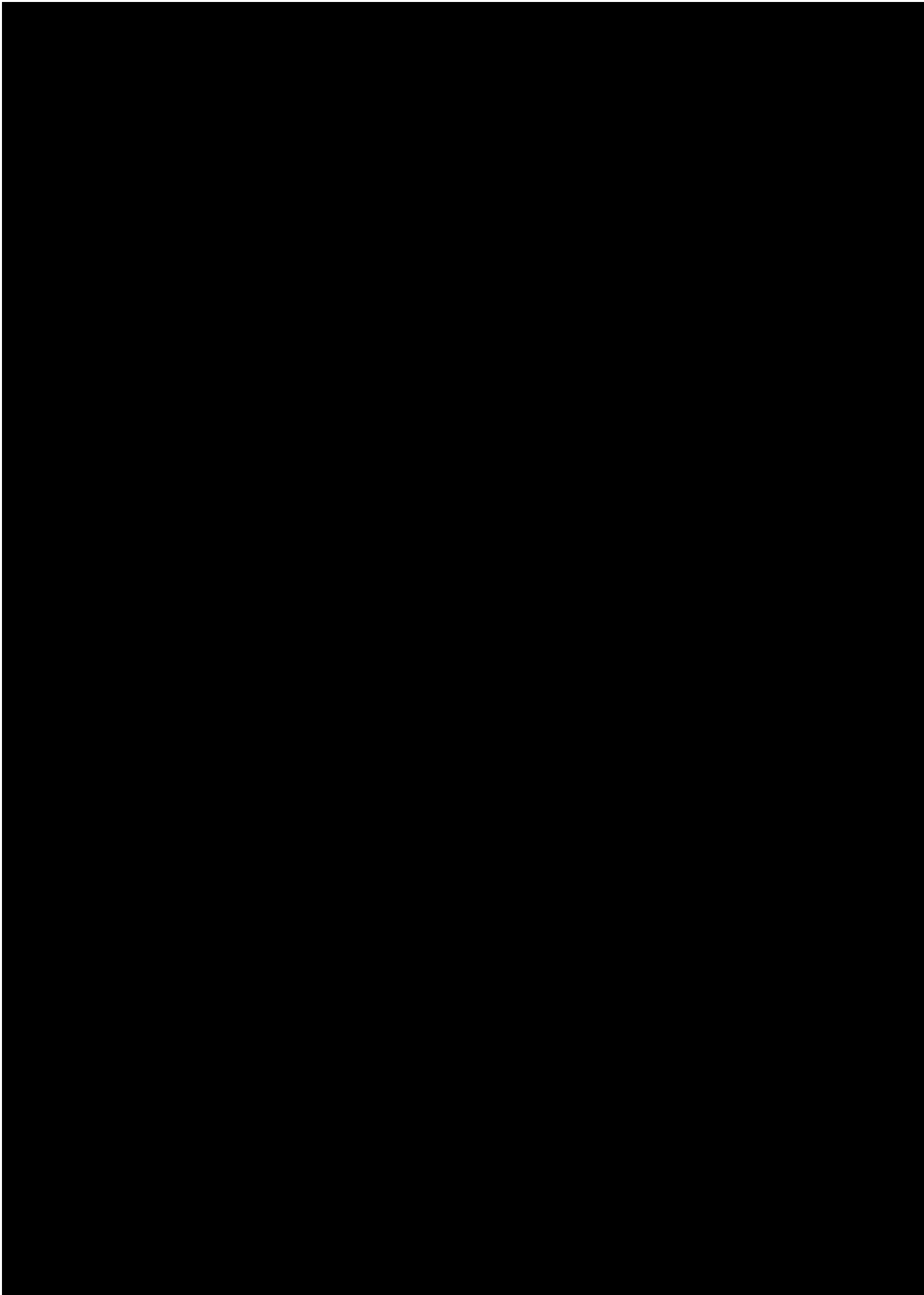
## 2.7 Sustainability issues

LSE and its partners are committed to the project and to the development of our institutional repositories. We will be seeking to use the Version Identification Framework in the management of our repositories and will be actively working towards community acceptance and take-up of the framework by other repositories and repository services.

LSE will ensure that the Version Identification Framework and other published deliverables continue to be available together with all project documents on LSE's website for three years after the completion of the project and will assist JISC and other organisations with archiving these materials.

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<sup>12</sup> <http://www.rlg.org/en/pdfs/repositories.pdf>



## **4. Key Personnel**

### **Project Staff**

#### ***London School of Economics and Political Science (Lead Institution)***

##### **Project Director**

###### ***Frances Shipsey (institutional contribution)***

Frances Shipsey, will have overall responsibility for the project and will work with the project Steering Committee to ensure that the project deliverables are delivered. Frances has been Project Manager of the JISC-funded VERSIONS Project since July 2005 and represented LSE Library as partner in the RIVER Scoping Study. She has also been the local project officer for Economists Online, the European economics repository search service pilot developed by Nereus, since 2004. From January 2007 she will take up the position of Eservices Librarian at LSE, with responsibility for the provision of e-services, including LSE's Institutional Repository, LSE Research Online.

##### **Project Manager (0.4 FTE) – 10 months**

To be appointed. Based in the Information Services Division at LSE Library, the Project Manager will coordinate all project activity, including day-to-day project management, staff management, budgeting, administration, communication, deliverables and schedules. The postholder will spend approximately 0.2 FTE on project management and the remainder on development of the framework and dissemination.

##### **Project and Communications Officer (1.0 FTE) – 10 months**

###### ***Louise Allsop***

Louise will work with the Leeds team on the survey design, implementation and analysis of results. She will be responsible for dissemination activities, for all project support, and for coordination of meetings and workshops. Louise has been Project and Communications Officer for the VERSIONS Project, since January 2006 and has experience of working on the online survey, preparation of a range of dissemination materials, and maintaining the project website. Louise came to LSE from Elsevier, where she worked on the development and production of a range of large reference texts.

###### ***Jane Secker – (institutional contribution)***

Jane will participate in the local working group and will advise on teaching and learning and copyright issues, drawing on her expertise in these areas.

###### ***Library IT Support staff – (institutional contribution)***

Though this is not a technical development project, the experience of LSE's IT Support staff who have worked with repository software will bring a useful addition to the strength's of LSE's local working group.

#### ***Council for the Central Laboratory of the Research Councils (CCLRC)***

##### **Catherine Jones (0.2 FTE) – 10 months**

Catherine Jones joined the Rutherford Appleton Laboratory (SERC) in 1988 as a Database Applications Analyst/Programmer. In 1994 she joined the CCLRC Library and Information Service as Systems Librarian and in February 2004 was appointed to the post of Library Systems Development Manager. In this role she has been responsible for the development and running of the CCLRC's Institutional Repository, ePubs. She is also a member of the NISO/ALPSP Working Group on Journal Article Versions. She has presented and published about ePubs. She was on the review group for the JISC Eprints Application Profile Working Group and is working on the JISC-funded CLADDIER project.

#### ***University of Leeds***

##### **Local Project Officer (0.5 FTE) – 6 months**

The Project Officer will be responsible for leading on WP2 – user requirements gathering exercise. The Project Officer will design and develop survey instruments, drawing on previous good practice from both the MIDESS and VERSIONS Projects. He/She will publicise the survey and promote it to ensure a sufficient response rate is achieved. The Project Officer will also collate the results and produce a report on requirements.

Tracey Stanley, Head of eStrategy and Development, University of Leeds:

Tracey is responsible for the development of Library strategy for electronic services and electronic resources. She is the Project director for the University Institutional Portal Project, and is responsible for the University Virtual Learning Environment Service. Tracey is currently Project Director for the JISC-funded EVIE Project and for the JISC-funded MIDESS Project, and previously Project Director for the JISC-funded PORTOLE Project. She is leading the White Rose Consortium ePrints Repository at Leeds, and has also been involved in other JISC projects - including CEDARS and ILEJ.

### ***Erasmus University Rotterdam***

Peter van Huisstede

Peter has worked for RePub at EUR since 2004. He is currently a member of the DARE Metadata workgroup that is drawing up the guidelines for the new DARE metadata format 3.0. The guidelines will touch such topics as complex objects, MPEG21/DIDL containers, and OpenURLs.

## **Project Governance**

### ***Steering Committee***

A Steering Committee, chaired by the Project Director, will be established and will meet 2 or 3 times. Membership will include the Project Manager, representatives from each of the partners, invited academic staff, and other key stakeholders as appropriate.

### ***Working Groups***

A project-wide Working Group will be established. This will meet in person or by conference call at least monthly. Communication will take place also via project discussion lists and a wiki. Partners will establish a local working group consisting of any local project team staff, one or more academic/research staff, a local technical staff member, and other library or repository staff as appropriate. These local working groups will meet as appropriate for the work packages.

### ***Communication***

Communication will be carried out through a combination of face-to-face meetings, project wiki, project discussion lists and conference calls.

## ***Appendix A : List of partners and contact details***

### **LSE**

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