

The aim of the Full Business Case document is to capture and demonstrate the detail work supporting the summary in the updated version of Initial Business Case. See the Project Management Toolkit <http://intranet.bl.uk/bl-depts/cpo/toolkit/toolkit.htm> for guidelines and instructions how to complete this document)

# Title

## Full/Re-Submitted Business Case Guidance and Instructions

<b>B1</b>	<p><b>Mission statement for the Project (Objective)</b></p> <p>Archival Sound Recordings 2 will digitise, clear and make available online, approximately 24,000 recordings of audio content, supported by images and added value features, to the learning, teaching and research communities of the UK, and the general public by March 2009.</p>
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<b>B2</b>	<p><b>Definition and Background</b></p> <p>ASR2 is a web access project and will deliver digitised archival materials from the holdings of The British Library Sound Archive. A refined bid document was submitted in August 2006 to the JISC in response to a call for proposals under the JISC Digitisation Programme. The need to digitise and make content available to a wider audience is at the heart of The British Library's strategy for opening up its collections and the proposal set out the delivery of a significant amount of audio material from the holdings of The British Library Sound Archive and will take forward the strategy for opening access to defined content packages from within its collections. This proposal was accepted by the JISC Content Services Committee. Online delivery of audio significantly addresses existing obstacles to delivery of archival audio content and this project will dramatically enhance the British Library's ability to deliver content services remotely. Content will be delivered through the ASR service website developed as part of the first ASR project (2005-7).</p> <p>Digitisation will be undertaken from original audio carriers, be they analogue or digital in format. Digitisation of contextual images and images of hard copy catalogue data (record catalogues) is also planned. Archival audio masters will be created as digital preservation copies without any modification and will ultimately be stored in The British Library Digital Object Management system. The archival audio masters (BWAV) will be delivered in a number of derivative formats. These will include restored and/or segmented copies of the archival master and be output in BWAV, MP3 and Windows Media formats for audio. Images will be delivered as JPEGs (derived from TIFF).</p> <p>Metadata will be encoded using the Metadata Encoding and Transmission Standard (METS) with the descriptive element delivered in extensible Dublin Core encoded using The British Library Application Profile Sound (BLAPS).</p> <p>Rights will be cleared for each recording where applicable (approximately 90% of the content). The approach to rights clearance is outlined in appendix C9.</p> <p>Web delivery will be via the Archival Sound Recordings platform which was developed under the previous ASR project. This platform has been subjected to formal usability and accessibility testing under lab based conditions and any additions to the platform under the current project will be subjected to further testing and consultation with the user community in liaison with the project User Panel made up of academics and leading experts. The service is delivered in line with Common Information Environment guidelines. Under the current project the service will be made fully OAI compliant.</p> <p>Navigation of the site is via a data tree structure and navigational structure is content specific so each section of the site has its own navigational structure. Searching is via the Google Search Appliance (other search mechanisms may be evaluated during the course of this project). Browsing is enabled by allowing users to first listen to a streamed version of the audio file. If so desired they can then download and MP3 version for processing offline. Facilities will be added to the site under the current project to allow for sharing of data between users and the application of Web2.0 functionality will be evaluated and in particular tagging technologies.</p> <p>The online audio player developed under the ASR project will be further developed in order to integrate current technologies.</p> <p>Interaction with the community will be facilitated by the inclusion of a blog on the project website, workshops and outreach</p>
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activities to be undertaken by a community development officer.

### B3 Detailed Project Scope

Included in scope	Comment
⇒ Audio Digitisation - Archival copies of original carriers & derivative access formats	
⇒ Documentation for each digital object	
⇒ Image digitisation	To be delivered by BL Imaging Services Team
⇒ Rights Clearance	For the widest possible access
⇒ Full World Wide Web delivery of content	Where rights allow otherwise extranet delivery to authenticated users in HE & FE institutions
⇒ Interface development	To be conducted by British Library's Web Services Delivery Unit (WSDU)
⇒ User engagement including exemplar development	To be undertaken in partnership with subject centres of the HE Academy
⇒ User testing	To be conducted under external contract and managed by WSDU
⇒ Enhancement of search tools or functions	To be managed by WSDU
⇒ Where possible a full transcript of spoken word material	
⇒ METS implementation	To be conducted out of house.
⇒ Upload of content to the web	This will be carried out by the WSDU team
⇒ OAI compliance	The Library committed to this for ASR1 but there is still some way to go to reach full compliance.
⇒ Final Conference	

Excluded from scope	Comment
⇒ Online Audio manipulation tools	
⇒ Full Transcripts for every spoken word recording	
⇒ Speech to text auto transcription	
⇒ Advance online audio tools	
⇒ Storage of the archival digital master files	This will be handled by the BL DOMS Team

### B4 Constraints and Assumptions

- ⇒ Constraint - Available staff resources are limited
- ⇒ Assumption - It is assumed that rights can be cleared but there is no guarantee that rights can be cleared in all content.
- ⇒ Constraint - The upload of content is constrained by available WSDU resources
- ⇒ Constraint - The Quality Assurance regime is to be conducted by the Project Team Leader and this limits the ability to complete QA processes.
- ⇒ Assumption - It is assumed that The British Library Centre for Conservation will be available for the period of digitisation.
- ⇒ Assumption - It is assumed we can reach the user community.
- ⇒ Assumption - It is assumed that WSDU has the ability to upload content according to schedule.

- ⇒ Constraint – The project budget is agreed by the BL and The JISC and is unlikely to be increased.
- ⇒ Constraint – Access is primarily to FE & HE communities.
- ⇒ Constraint – IPR law
- ⇒ Constraint – Usability testing will constrain the development of the user interface.
- ⇒ Constraint – British Library Accessibility Standards will be followed and complemented by those of The JISC.
- ⇒ Constraint – BL and JISC standards guidance on interoperability and other technical issues.
- ⇒ Constraint – Metadata will conform to The British Library Application Profile and may also conform to the Metadata Encoding & Transmission Standard (METS).
- ⇒ Constraint – The project will follow agreed standards for imaging and audio transfer.
- ⇒ Constraint – All resources for the project will be provided by the project with minimal input from colleagues in other areas of the Sound Archive.
- ⇒ Constraint – Access to all JISC audio content will be available online on BL premises provided this is project budget-neutral. If it is not then this provision will fall outside of the scope of this project..

**B5****Dependencies**

- ⇒ Commitment of WSDU resources
- ⇒ Commitment of eIS resources
- ⇒ There is dependency on the DOMS Team for ingest of digital masters.

**B6****Approach**

- ⇒ The ASR2 project will capture audio data according to the technical standards as set out in *IASA - Standards, Recommended Practices and Strategies IASA-TC 04 Guidelines on the Production and Preservation of Digital Objects* (see Appendix C9 – sample product description)
- ⇒ Images will be captured in accordance with British Library preservation guidelines which are in line with international guidelines on best practice (see Appendix C9 – sample product description)
- ⇒ Metadata will be encoded in METS with embedded descriptive data encoded in BLAPS (British Application Profile – Sound) which is encoded as extensible Dublin Core.
- ⇒ The web service will deliver audio access (service) copies in MPEG layer 3 and Windows Media formats. Images will be provided as JPEGs. All textual digital assets will be provided in the latest version of Adobe PDF. Catalogue data will be provided with fully searchable OCR where font sizes permit.
- ⇒ The current ASR service website will be the delivery platform but will be enhanced and tested again for accessibility.
- ⇒ The approach of involving users from early on in the project will be applied and careful use of user feedback will inform the development of functionality for the ASR service website. The first ASR project has demonstrated that this approach works and the new project will implement a similar strategy in order to ensure delivery with full recognition that a number of key lessons (see lessons learned report) have been learned from the earlier project. The primary means of engaging with the user community is through the User Panel. Other means of engagement will be through events, marketing and the development of website feedback mechanisms. There will also be engagement during the process of user testing the website once new functionality has been added. It is now proposed that a communications officer be employed to facilitate outreach into the community. The development of Web 2.0 technologies will be tested, in particular by enabling users to share information with other users through for example semantic tagging and through the development of a blog and/or wiki.
- ⇒ The proposal to the JISC indicated an approach to digitisation which included undertaking a proportion of the work out of house. This document proposes that all digitisation work be carried out in-house using contractors, and an options analysis is included in Appendix C2 to demonstrate why this is the preferred option. This approach minimises the risk to collection items. Carrying out digitisation in-house means that there can be a more flexible approaches to challenging archival issues. It is now proposed that a Digitisation Assistant is employed to facilitate the digitisation workflow in terms of preparation of materials.

- ⇒ METS compilation will be continue done out of house as the Library has limited resources to facilitate this kind of work.
- ⇒ The approach to the clearance of intellectual property rights is to ensure oversight by the Legal Services Manager from the start. This should enhance the effectiveness of a coherent strategy for all rights to be cleared. There are issues relating to the indemnification of HEFCE as it is very challenging to clear third party contributor rights in archival audio materials. The approach will be to clear as many rights as is possible in the one year granted to the project but this does pose a considerable risk that there will be a loss of content. (see Appendix C10)
- ⇒ Project management will be conducted according to The British Library's Project Management guidelines in accordance with Government best practice using Prince2 methodologies. Planning of the products for the project will be conducted according to Prince2 product planning approaches.
- ⇒ Quality Assurance of audio will be conducted by the Project Team Leader (PTL) but overseen by BL Sound Archive Technical Services. Quality assurance of METS will be conducted by an external consultant after initial QA by the PTL.
- ⇒ The project will be managed in stages conforming to the Library's quarterly reporting cycles. The project board will be asked to accept the projects at the end of each stage.
- ⇒ Marketing will be conducted in full partnership with HE Marketing (See Appendix C5 for the full marketing plan).
- ⇒ WSDU will control all web deliverables and assure their quality. It is proposed that a Web Assistant is employed within the WSDU team to provide support to the limited WSDU resources.

Options Appraisal completed in respect of this project?  
See Appendices.

Yes No **B7 Organisation structure**

- ⇒ Project Champion - Ronald Milne (The British Library's Director of Scholarship and Collections).
- ⇒ Project Board – Crispin Jewitt (Senior Responsible Owner, Head of the Sound Archive), Adrian Arthur (Head, WSDU), Richard Ranft (Head, Sound Archive Technical Services), Alastair Dunning (JISC Digitisation Programme Manager), John Tuck (Head, British Collections).
- ⇒ ASR Project Team (Peter Findlay (Project Manager), Michelangelo Staffolani (Project Team Leader), Melanie Bourne (Project Support Officer), Eva Del Ray (Metadata Editor), Punitha Sivamberam (Project Analyst) and Niall Anderson (Metadata Editor).
- ⇒ Web Services Delivery Unit
- ⇒ BL Sound Archive Documentation Team
- ⇒ BL Sound Archive Curatorial Team
- ⇒ BL Sound Archive Technical Services Team
- ⇒ BL Legal Service Team
- ⇒ BL Imaging Team
- ⇒ BL Corporate Programme Office
- ⇒ BL Corporate Procurement Unit

**B8 Key Business Milestones****Date**

Anticipated Start Date

April 2007

Other Key Milestone - ICA launch event (TBC)

February 2008

Other Key Milestone - Upload of 3 content packages

April 2008

Other Key Milestone – Upload of 5 remaining content packages

February 2009

Closing Conference

End February 2009

Anticipated End Date

End March 2009

<b>Anticipated Benefits Review date</b>	TBC
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B9		Project Deliverables			
Project stage	Deliverable	Acceptance criteria	Measure	Delivery date	Comment
	GERZON RECORDINGS CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	June 2008 [August 2008]	Handover to Sound Archive (DOMS)
	CANONICAL CLASSICAL MUSIC CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	July 2008 [October 2008]	LP's masters: October 2007 Handover to Sound Archive (DOMS)
	DECCA WEST AFRICA CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	November 2007 [April 2008]	Handover to Sound Archive
	EARLY RECORD CATALOGUES CP Masters & Access	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	February 2008	Handover to Sound Archive (DOMS)
	EARLY SPOKEN WORD CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	December 2008	Handover to Sound Archive (DOMS)
	SRA NEWS & CURRENT AFFAIRS CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	November 2008 [February 2009]	Handover to Sound Archive (DOMS)
	TRAD MUSIC IN ENGLAND CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	April 2008	Handover to Sound Archive (DOMS)
	ICA TALKS CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	January 2008	Handover to Sound Archive (DOMS)
	LIVING MEMORY OF THE JEWISH COMMUNITY CP masters [& playback]	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	February 2008	Handover to Sound Archive (DOMS)
	RECORDS & PLAYERS ADDITIONS CP	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	December 2008	Handover to Sound Archive (DOMS)
	Approximately 48,000 audio access files	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	February 2009	On going according to release schedule. Handover to WSDU & Sound Archive
	Approximately 7,000 label images & associated access files	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	December 2008	To be carried out in parallel with audio transfer. Handover to Sound Archive (DOMS)
	Approximately 7,000	Conformance	Digitisation	December 2007	Handover to Sound

	images & associated OCR files & access files	with product descriptions & benchmarks.	Log and QA reports to Project Board		Archive (DOMS)
	Approximately 24,000 METS files	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	February 2009	Ongoing to December 2008
	Signed Licence agreements with rights owners	Already agreed but subject to review	NA	March 2009	All permission letters, agreements and schedules sent by Dec. 2008.
	Approximately 4,000 pages of transcripts & related OCR files	Conformance with product descriptions & benchmarks.	Digitisation Log and QA reports to Project Board	April 2008	To be handed over the Sound Archive (DOMS)
	Upload notifications	QA by PTL & Reports to Project Board	Digitisation Log and QA reports to Project Board	?	This is effectively sign off of content on the web service and is the point of handover to operational delivery of the service
	A number of case studies/usage exemplars	Review by SRO & external review by User Panel and independent reviewers	Fit for purpose	March 2009	On-going to December 2008 To be developed in partnership with HE Academy.
	Additional functions added to ASR website	Completion of successful user testing.	Review by user community.	March 2009	Operational handover to WSDU. Implementation is dependent on user feedback and lab based testing
	Conference - Using time based digital resources	Conform to BL standards for such events. The plan will be reviewed by the HE Marketing Team and BL Events Team.	Number of delegates. Press coverage. Additional sign up to ASR service.	February 2009	The event will seek to highlight the ASR service and other time based JISC projects as part of the JISC digitisation programme. To be organised in conjunction with the JISC and HE marketing
	Workshops	Fit for Purpose	Number of delegates and feedback		These events will follow the model established for ASR1

B10	<b>Quality management</b>
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See Appendix C4
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B10	<b>Risks</b>
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See Appendix C4
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B10	<b>Stakeholder analysis</b>
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See Appendix C5
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B10	<b>Communications &amp; Dissemination</b>
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See Appendix C2

<b>B11</b>	<b>Operational handover and exit strategy</b>
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The Library has committed to sustain the ASR service for a period of 10 years from 2008 to 2018. During the course of the project the Library will consider extending the commitment to support the service beyond 2018 to 2020. Operation of the website will be undertaken by a member of Library staff in liaison with Web Service Delivery Unit. The service is hosted at UKERNA but all content and presentation layers are controlled by the Library. The project will deliver all digitised content in the form of access files and accompanying METS files to WSDU for upload onto the live UKERNA data servers at which point management of the web data sits with the WSDU team. Digitised masters will ultimately be ingested into DOMS the Library's digital store. Marketing of the service will be conducted by Higher Education Marketing going forward from the end of the project. The British Library Sound Archive will have overall responsibility for the maintenance of the service.

<b>B12</b>	<b>Lead Directorate</b>	Scholarship and Collections
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<b>B14</b>	<b>Significant Procurements or Sales Contracts</b>
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	Yes	No	CPU Involved?
No Significant Procurement Envisaged			
Single Tender (Under £50,000)	√		
Single Tender (Over £50,000)			
Competitive Tender	√		To be involved

Status :

<b>B15</b>	<b>Resource Impact on Other Directorates (If Any)</b>
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⇒ WSDU resources for uploading content, functional changes and interface enhancements.

<b>B16</b>	<b>General Ledger Code(s)</b>	Responsibility Centre = RJT; Function code = 8511
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<b>B17</b>	<b>Financial Management</b>
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Funds will be released by the JISC against a monthly profile. Financial management will be undertaken by the Scholarship & Collections Directorate Finance Team. Day to day financial management sits with the Project Analyst and the Project Manager.

<b>B18</b>	<b>Overall Discretion (delegated authority for variations from stated values in this case)</b>
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<b>Flexibility of Costs/Resources/Time for the Project Manager</b>	5% C, 5% R, 10% T
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<b>Flexibility of Delivery of benefits in terms of quantities and time for the SRO</b>	5% Q, 5% T
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<b>B19</b>	<b>Project controls</b>
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<b>B19.1</b>	Reporting
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- ⇒ Reporting to the Library's Executive Team is on a monthly basis.
- ⇒ Project Board reports are submitted by the Project Manager at regular Project Board meetings.
- ⇒ Summary digitisation log reports allow for deliverables to be monitored against targets.
- ⇒ A project close report will be produced at the end of the project.
- ⇒ Reports to the JISC are required at six monthly intervals.
- ⇒ A final report is also required by the JISC.
- ⇒ A Lessons Learned report will be produced at the end of the project.
- ⇒ QA will be conducted according to the Quality Plan

**B19.2 | Exception process**

All exceptions are prepared by the Project Manager and submitted to the SRO. Minor exceptions are reported as a matter of course to the Project Boards as part of the usual reporting cycle. Exceptions which may have major impact on scope, duration or costs are submitted to the Project Board for approval. Major exception may require an emergency meeting of the Project Board and these can be requested by the SRO, the Project Manager, or any member of the Project Board.

**B19.3 | Project assessments**

TBC

**B19.4 | End stage reviews**

Will be carried out in consultation with BL Corporate Programme Office

**B19.5 | Project documentation**

- ⇒ Business Case (Funding Proposal to the JISC)
- ⇒ Full Business Case (Project Initiation Document)
- ⇒ Communications Plan
- ⇒ Project Manger's Progress Reports
- ⇒ Summary Digitisation Log
- ⇒ Additional Functional Requirements Document
- ⇒ Product Descriptions

**B19.6 | Quality assurance**

Deliverable	Quality control	Comment		
GERZON RECORDINGS CP masters [& playback]	Initial QA by PTL Reviewed by BLTS	See Quality Plan		
CANONICAL CLASSICAL MUSIC CP masters [& playback]	Initial QA by PTL Reviewed by BLTS	See Quality Plan		
DECCA WEST AFRICA CP masters [& playback]	Initial QA by PTL Reviewed by BLTS	See Quality Plan		
EARLY RECORD CATALOGUES CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		
EARLY SPOKEN WORD CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		
SRA NEWS & CURRENT AFFAIRS CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		

	TRAD MUSIC IN ENGLAND CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		
	ICA TALKS CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		
	LIVING MEMORY OF THE JEWISH COMMUNITY CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		
	RECORDS & PLAYERS ADDITIONS CP masters [& playback]	Initial QA by PTL Reviewed by BLSATS	See Quality Plan		
	Approximately 48,000 audio access files	Initial QA by PTL Reviewed by BLTS	See Quality Plan		
	Approximately 7,000 label images & associated access files	QA by PTL	See Quality Plan		
	Approximately 7,000 images & associated OCR files & access files	QA by PTL &	See Quality Plan		
	Approximately 24,000 METS files	Review by Head Selection & Documentation	Approach: initially benchmarking then spot checking by random Sampling. Formal QA by external consultant.		
	Signed Licence agreements with rights owners	Fit for purpose	See Quality Plan		
	Approximately 4,000 pages of transcripts & related OCR files	QA checks by Oral History section	See Quality Plan		
	Upload notifications	N/A	See Quality Plan		
	A number of case studies/usage exemplars	These must conform to the Product Description	See Quality Plan		
	Additional functions added to ASR website	WSDU to assure	See Quality Plan		
	Conference - Using time based digital resources	Feedback	See Quality Plan		
	Workshops	Feedback	See Quality Plan		

B20	<b>Approved/Signed off by DFM</b>	
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B21	<b>Updated version of Initial Business Case included with this document</b>	<b>No/Yes (delete)</b>	<b>Appendices included with this document</b>	<b>No/Yes (delete)</b>
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<b>Tracking Reference Number:</b>	Version: 2.0 FINAL (FOR APPROVAL)	Date: 28/06/2007
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### APPENDIX C1 - Detail of Business Benefits

- ⇒ This project contributes significantly to the Library's Strategic Objective 2 - Build the digital research environment.
- ⇒ This project contributes significantly to the strategic relationship with the JISC.
- ⇒ This project ensures that significant quantities of hard to access content become accessible to a primary British Library user community and the general public.
- ⇒ This project ensures the long term preservation of at risk audio heritage.
- ⇒ This project significantly raises the British Libraries profile with the communities it serves.

### APPENDIX C2 - Option Analysis

#### a) OPTIONS IDENTIFIED


<b>OPTION 1</b>	<b>DO NOTHING SCENARIO</b>
Detail :	
Reason for Rejection: This project is already funded by the JISC and has in fact commenced.	
<b>OPTION 2</b>	<b>Digitisation to be conducted in-house &amp; METS encoding out of house</b>
Detail: Moving considerable amounts of fragile carriers (double the amount for ASR1) outside of the Library incurs considerable risks. Experience from the first ASR project shows that though there are benefits to the use of external supplier these are outweighed by overheads. For example, when a batch of tapes has significant technical issues which become apparent during digitisation, a supplier will require a change to contract. This will not be the case if the work is conducted in-house where colleagues are experienced and able to deal with the unexpected issues that inevitably arise with archival material. The key issue here is the unique nature of the business we are engaged in. Having technical, curatorial and management support close at hand will facilitate more flexible approaches to dealing with difficult material. METS compilation cannot be resourced from within the library and it is proposed that this service be procured by an external supplier (under single tender application). A major consideration when scoping the earlier project was the lack of technical facilities available to undertake mass digitisation projects. These facilities exist now in the new BL Centre for Conservation at St Pancras and the investment of public funds justifies the approach of bringing the digitisation in-house using external contractors.	
Reason for Selection: Better control of complex archival processes. Cost effectiveness.	
<b>OPTION 3</b>	<b>Half the audio digitisation &amp; METS encoding out of house</b>
Detail: This was the proposal to the JISC and it has been carefully re-evaluated in terms of value for money and significant savings can be made by undertaking the work in-house with external contractors. The procurement of digitisation services would take a considerable investment in terms of time and it is now agreed that digitisation will start much earlier if the work is all done in-house. There were some questions about the availability of space in the new Centre for Conservation at the time of making the proposal to the JISC, but these questions have now been resolved. There is concern that digitisation out of house is complex to manage and difficult to specify as so much information has to be given to the supplier upfront. This often leads to misunderstandings, and there we are confident that these can be avoided by having relevant experts on hand.	
Reason for Rejection: Lack of control of complex archival processes and value for money.	

	{ Programme Name }	{ Project Name }
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Stakeholder	Interest	Communication needs

**Copy below the relevant email correspondence, underwriting support of the project, from each key stakeholder identified within this case.**

<b>Tracking Reference Number:</b>	Version:	Date:
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	{ Programme Name }	{ Project Name }
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## APPENDIX C3 – Quality Plan

### Benchmarking

Audio and Metadata deliverables will be benchmarked during the EXECUTE stage and referenced against standards agreed between the BL and the internal team for metadata and the suppliers of digitisation services for audio. All technical deliverables will be measured against these benchmarks.

### QA Methodology

- A randomly selected file out of every 50 produced will be quality assured on a monthly basis. The approach will be taken with all Master, Playback, METS and image files. The Project Team Leader will be responsible for making the sample files available to the Heads of Technical Services and Documentation and Selection.
- The Head of Technical Services and Head of Documentation and Selection, or a member of staff nominated by them, will then complete a Quality check against the Product Description and the Benchmarked deliverables for audio and metadata.
- A report will be made by the Project Team Leader to the Project Manager, and if necessary further files requested from the batch.
- Should further issues be identified after examination of these items then the digitisation suppliers and/or internal team may be required to re-digitise and/or recompile metadata files for the entire batch.
- Two six-monthly reviews are scheduled for February and August 2008, and a final quality review for March 2009.
- Access copies will be sampled live from a holding (staging) server. Some test content will be examined by a select group of end users.

### Web interface & METS

The interface will conform to W3C web standards and accessibility guidelines. It will undergo structured user testing. Its design and content will be informed by an expert User Panel. Its quality will be measured against BL standards and against the final specification

METS will be Quality Assured on a holding server.

### Project Documents


- These will conform to BL project management guidelines and the guidelines laid down by the JISC.
- The entire project will undergo a formal evaluation by the JISC to ensure it has met its Quality Plan.

<b>Tracking Reference Number:</b>	Version:	Date:
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**Schedule**

<b>Activity</b>	<b>Date due</b>
<i>BENCHMARK SET (AUDIO TRANSFER AND METADATA)</i>	<i>31 July 07</i>
QA sample and report to Project Manager	31 August 07
QA sample and report to Project Manager	30 September 07
QA sample and report to Project Manager	30 October 07
QA sample and report to Project Manager	30 November 07
QA sample and report to Project Manager	30 December 07
QA sample and report to Project Manager	30 January 08
<i>Six monthly review and report to Project manager</i>	<i>29 February 08</i>
QA sample and report to Project Manager	30 March 08
QA sample and report to Project Manager	30 April 08
QA sample and report to Project Manager	30 May 08
QA sample and report to Project Manager	30 June 08
QA sample and report to Project Manager	30 July 08
<i>Six monthly review and report to Project manager</i>	<i>30 August 08</i>
QA sample and report to Project Manager	30 September 08
QA sample and report to Project Manager	30 October 08
QA sample and report to Project Manager	30 November 08
QA sample and report to Project Manager	30 December 08
QA sample and report to Project Manager	30 January 09
QA sample and report to Project Manager	28 February 09
<i>Final review</i>	<i>15 March 09</i>

<b>Tracking Reference Number:</b>	Version:	Date:
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	{ Programme Name }	{ Project Name }
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## APPENDIX C4 – Communications Plan

### **Archival Sound Recordings 2 Marketing & Communications Plan April 2007 – March 2009**

#### **Background**

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Archival Sound Recordings (ASR) was launched in September 2006 as a new service for UK further and higher education to provide free online access to 3,900 hours of audio material from the British Library's Sound Archive. At the end of Phase One of the project (Sept 2006 – March 2007) around 160 colleges and universities signed and returned a license agreement to the British Library. This agreement gives students and staff from the organisation access to the audio recordings using an Athens or Shibboleth password. Users can listen, search and download material for teaching, learning and research purposes, e.g. for inclusion in institutional repositories, Virtual Learning Environments (VLEs) and course material packs.

During ASR 2 the following content packages will be added to the service:

- Contemporary art
- Holocaust material
- Early spoken word
- West Africa
- Record catalogues
- Classics
- Traditional music
- Chopin
- Amphibian sounds
- Scientists' lives

#### **Marketing Objectives**

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- To significantly increase usage of the service by students and academic staff from universities and colleges in the UK.
- To raise the profile of the service, the British Library and the JISC Programme.
- To raise the profile of the use (and issues around) of sound in teaching, learning and research.
- To gain an understanding (quantitatively through web stats, and qualitatively through case-studies and consultation) of who is using the service, how and why.
- To continue to gain sign-up for the service from organisations who did not do so during ASR 1.

#### **Target audience**

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In the first ASR project we focused on engaging with academic librarians to increase sign-up to the service. There will be a shift in focus in ASR2 towards the end users; academic staff, students and existing BL readers.

However, the target audiences can be defined as:

*Those responsible for signing the license agreements:*

- HE and FE librarians

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*Key stakeholders who will be able to promote the service to others, act as advocates:*

- HE and FE librarians, information professionals, learning resource managers
- Teachers, lecturers and academics in FE and HE
- HE and FE students, taught and research courses (to peers)
- BL stakeholders

*End-users:*

- Teachers, lecturers and academics in FE and HE
- HE and FE students, taught and research courses
- BL Readers (on site)

*Target disciplines:*

The target audiences are similar to those outlined in ASR 1.

- African studies and languages
- Art and design - architecture, painting, design, audio visual media, fine art, photography, postmodernism, sculpture
- Cultural studies - cultural and ethnic identity, cultural history (strong offering for African studies)
- Media studies - broadcast media, journalism
- Music - 20<sup>th</sup> century music, history of music, music composition, music technology, musicology, world music
- ethnography, ethnology
- Social sciences
- History and classics
- Herpetology (new area)

## Tactics


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### **E-marketing**

- *ASR e-newsletter*  
To produce an e-newsletter 4 times per year, to include information on new content, events, background to the project, etc. We will gain sign-up to the newsletter via the [www.bl.uk/sounds](http://www.bl.uk/sounds) home page, and through our promotional material.  
  
The newsletter will be targeted at end users, academic staff and stakeholders with an interest in the project.
- *HE e-newsletter*  
The Higher Education Team produces a more general e-newsletter for UK higher education which is released every two months, and has a circulation of around 15,000. To feature ASR 2 in the newsletter twice during the two year period.
- *BL website*  
To maximise visibility of the service from the British Library web pages.
- *Lis-servs*  
To offer promotional material on the service to academic librarians through lis-SCONUL, etc.
- *Blog & Podcasts*  
To create a team blog from the ASR site to develop more two-way communication channels with end users. The blog will discuss some of the issues around the use of sound in learning, research and teaching, new developments highlight areas of content.

A series of podcasts will allow users to engage with specifically targeted content. This should drive traffic to the site and allow users to gain an insight into what is held in the archive.

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### **Direct mail**

- To send letter to individuals who are responsible for signing the license agreement within each HEI, to offer them promotional material to distribute within their own organisation (summer 07).
- To send letter and leaflets to academic librarians from organisations who have not yet signed-up to the service (January 08, May 08).

### **Events**


- To hold five workshop sessions at HEIs in the UK over the two year period. In these sessions we will give a demonstration of the service, discuss its application, and also encourage debate around the use of sound in teaching, learning and research.
- To hold a high profile seminar/workshop day for key stakeholders (Mar 2009) to discuss progress of the service and the project.

### **Key conferences**

1.1.1 We will aim to a) have a speaker at the event on Archival Sound Recordings, b) have a poster stand, or c) place leaflets in the delegate packs, wherever appropriate.

- *De Lange Conference on Emerging Libraries (completed)*  
March/April 07, Lynne Brindley gave a talk entitled "The Incredible Journey - Building Great Libraries for the Digital Age" which covered ASR.
- *SCONUL conference*  
20 June 2007. Annual conference for academic librarians. The HE Team to have a poster stand at the conference, to help range of products and services including ASR 2.
- *CarMAC 2008 (Cardiff University Music Analysis Conference)*  
4-7 September 2008  
Cardiff University, Cardiff
- *Combined CHARM Conference and RMA Annual Meeting*  
Musicology and Recordings. Royal Holloway, University of London, Egham, 13-15 September 2007
- *Ethnography Conference*  
13-14 September 2006. A Joint University of Liverpool Management School and Keele University Institute for Public Policy and Management Symposium on Current Developments in Ethnographic Research in the Social and Management Sciences.
- *Africa in Motion: Edinburgh African Film Festival.*  
Centre of African Studies is an official partner of AiM and will be hosting a half-day symposium on African cinema during the festival, 20-29 October 2006. (focused enough on FE and HE?)
- *Association of Social Anthropologists of the UK and the Commonwealth Decennial Conference*  
14-18 Jul 2003, Anthropology and science. Contact: Rohan Jackson, University of Manchester, Department of Social Anthropology.

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**Press coverage**

- To work with the British Library Press Team to create list of media to target. To focus on highlighting areas of the ASR collection packages.

**Feedback**

- To gain statistics on usage of the service, combining Athens stats with web services data.
- Develop case-studies of users – mixture of academics and students.

**Raising awareness of the service with existing BL Readers**

- Leaflets in Reading Rooms (StP and BSpa)
- Two articles in the Reader Bulletin (e-mail and printed) during the two year period.
- Staff talks and discussions with curators/ reading room staff to ensure they are aware and fully briefed on the service.

**Relationships with key organisations**

To continue to develop our relationships with:

- The Higher Education Academy and their Subject Centres
- African Studies Association of the UK
- Royal Music Association
- Society for Music Analysis
- UKADIA
- Others to be identified.


What will a productive relationship look like?

- Distribution channel for promotional material (printed, e.g. leaflets, or via the web/ email)
- Partners in developing workshops (e.g. HEA during ASR 1)
- Speaking opportunities at key meetings, conferences or workshops
- Sign-up key stakeholders from each to the ASR e-newsletter.
- Source of feedback/ case-studies for the service.

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**APPENDIX C5 – Risk Analysis as viewed by the Project Board**

<b>Risk</b>	<b>Management approach</b>	<b>likelihood</b>	<b>severity</b>
Clearance of IPR by the HEFCE deadline	Careful research of third party contributors. Strategic approach to rights negotiations and clearance.	MEDIUM	HIGH
User testing takes too long.	Careful scheduling. Do less testing as ASR testing extensive.	LOW	LOW
Emerging usability and re-purposing requirements cut across realistic licensing objectives.	Keep IPR overhead low.	MEDIUM	MEDIUM
Delay in IPR acquisition	Careful scheduling and early start.	MEDIUM	HIGH
Loss of content due to complex IPR issues	Have content in reserve. Work closely with curators from the start to identify replacements.	MEDIUM	MEDIUM
Loss of content due to overestimation of number of hours.	Better understanding of this since ASR but still an issue. Quoted hours reduced slightly to reflect potential.	HIGH	MEDIUM
Complexity of materials may raise unforeseen issues.	Less of an issue due to ASR experience. Careful planning	HIGH	MEDIUM
User testing casts up too many problems.	Not likely but careful scheduling and early engagement with community	LOW	LOW
IPR licensing costs higher than expected.	Less likely than with the ASR project as lower risk materials are proposed. Careful management of budget.	MEDIUM	MEDIUM
Sustainability costs and procurement uncertain.	Much less uncertain since ASR project but issues need to be addressed early on.	LOW	MEDIUM
External supplier cannot do what they claim.	High quality procurement using OGC consultancy.	LOW	HIGH
Supplier relationship breakdown.	Careful contract management and partnership working with open communication. Supplier representation at Project Board.	LOW	HIGH
Change of requirements (scope creep).	Drafting of a Project Initiation Document minimises risk. Well defined business case and deliverables list.	LOW	MEDIUM

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## APPENDIX C6 – User Analysis

Some material proposed here is in response to interest expressed by the ASR User Panel, by Sound Archive contacts in academic departments and some in response to listening requests at the British Library. Sound Archive curators are engaged with academic research and some teach at leading institutions and have extensive contacts with academics. The Sound Archive Listening and Viewing Service team logs requests for material on a daily basis and this information is invaluable in determining the interest of students, researchers and the general public.

### TRADITIONAL MUSIC IN ENGLAND

“The development of the Internet resources related to the Traditional Music in England project would be of great benefit to us. Quite frankly, we suffer from a relative paucity of wider English material when compared to what is available in terms of say Northumbrian music (well catered for by the FARNE project) Scots and Irish music. Whereas the resources available in Edinburgh and Glasgow are relatively easily available to us, and Dublin is only a cheap flight away, the resources of your institution and the Vaughan Williams Library are more difficult and expensive to access. I am not making a special case here, this must be true for any people interested in the field who do not live within easy access of central London. In terms of teaching the availability of this body of material would mean that we could and would integrate its use into various of our modules, for example 'Traditions of These Islands' and 'Ballad Studies and Folk Song Research' as well as solo instrumental, vocal and ensemble work. In terms of research, both for academic staff, research students and undergraduates doing module essays and dissertations, the accessibility of this body of material would greatly enrich what we do and open up new possibilities.” – Vic Gammon, Senior Lecturer in Folk and Traditional Music Degree Programme Director, BMus in Folk and Traditional Music International Centre for Music Studies School of Arts and Cultures, The University of Newcastle, Newcastle upon Tyne.


“It is our policy on the Folk Degree course to guide our students, wherever possible, towards primary source material of the highest quality. For singers wanting to explore the repertoire of a particular region or social group, or musicians wanting to develop a style of playing associated with say, a type of dance tradition, the recordings you describe would be of enormous help, and of particular use because of the inclusion of and emphasis on English traditions. Our English students sometimes feel disadvantaged in the face of the huge amount of material from Celtic traditions that is fairly easily sourced - they need to be aware and informed about their own folk music and song heritage and to take pride in it.” – Sandra Kerr, Lecturer, University of Newcastle upon Tyne.

“The availability of these recordings online would provide an unparalleled source in England, making English traditional music available to a wide constituency of interested parties. The project, though smaller in scale, has similarities with the prestigious and highly successful Save Our Sounds project of the American Folklife Center at the Library of Congress and the Center for Folklife and Cultural Heritage at the Smithsonian Institution, USA (<http://www.loc.gov/folklife/sos/index.html>). Traditional music is of interest to those in a number of disciplines, including music and ethnomusicology, folklore studies and ethnology, education, English literature, social, cultural and local history, popular culture, and childhood studies. The proposed resource would therefore potentially benefit a wide range of scholars and students in the academic community.” – Dr Julia Bishop, National Centre for English Cultural Tradition at the University of Sheffield.

“[The service will enable] setting follow-up/preparatory listening which the entire 125 strong class can access without fighting over the same CD in the library. [Also] setting group tasks related to a specific recording - e.g. critiquing and comparing interpretation and performance practice techniques, methods of transcription of ethnomusicological material, graphing structures and forms, etc.” – Dr Rachel Cowgill, Senior Lecturer and Postgraduate Research Tutor School of Music, University of Leeds

### MICHAEL GERZON RECORDINGS

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The Gerzon recordings are of particular interest to those studying composition, 20th century music history, music theory and musicology. There has been considerable interest in his work. See [http://www.york.ac.uk/inst/mustech/3d\\_audio/elentrib.htm](http://www.york.ac.uk/inst/mustech/3d_audio/elentrib.htm) for research by the Music Technology Group at the University of York. Deborah Price, Lecturer in Writing at Dartington College of Arts has indicated that this material would be of significant interest to students on courses she teaches.

#### HOLOCAUST SURVIVORS' CENTRE

The Holocaust material is likely to be of great interest to the curators of The Holocaust Resource Room at The Stanley Burton Centre for Holocaust Studies, University of Leicester, and for example for students on the MA in Holocaust Studies at the Royal Holloway.

#### EARLY RECORD CATALOGUES

“The proposal to digitise the pre-1926 catalogues held at the British Library will undoubtedly be of the greatest assistance both to on-going research in this field, such as that undertaken by CHARM (Centre for the History and Analysis of Recorded Music), and by interested members of the general public. In addition, from my experience of working with digitised print resources in the past (such as the digital version of 'The Times', also held by the BL) I have no doubt that the extraordinary search possibilities of digitisation will allow for the acquisition of knowledge and information not presently considered. This will be a very useful step forward and could well lead to many valuable as well as interesting developments in the future.” – Dr David Patmore, Sheffield University, Research Fellow, AHRC Centre for the History and Analysis of Recorded Music.

#### DECCA WEST AFRICA “YELLOW LABEL” SERIES

“I would find the field recordings and popular music recordings valuable, particularly those from Africa. My particular interest currently is extracting timings from recordings in order to compare tactus periods, phrase lengths, and shortest note values a, across cultures.” – Andy McGuiness, Meaning and Experience in Music Performance Group, Open University

#### TRADITIONAL MUSIC IN ENGLAND


“The explosion of popular interest in “world music” has had an important effect on the study of non-Western musics but also on the study of traditional music of the British Isles. The traditional music of England is perhaps least well served in terms of resources, with the “Celtic” nations (including those on the western fringes of the European continent) arguably in the lead. This is a very substantial package that redresses that balance.

This package will be used very widely, for both teaching and research (where its deep coverage makes it a potentially very valuable research tool). Its reach extends beyond a musical audience, although it will be primary source material for courses such as the BMus in Folk and Traditional Music course at the University of Newcastle and similar specialist courses in both HE and FE. Its wider potential, as a resource to the study of traditional culture - particularly in the context of the changing contemporary understanding of English culture - is extremely rich and it will secure a firm place in ethnographical, historical and cultural studies areas.

At RSAMD we have experience of using networked sound resources for the study of traditional Scottish music. The obvious advantage is that this provision makes accessible materials that were otherwise extremely hard to listen to. As well as recordings of performances, the collection contains rare interviews with tradition-bearers that are unique – and it’s absolutely vital to listen and not read from transcripts of material like this. The knock-ons from this are considerable. New research avenues are opened up; new ways of studying and using both oral and musical sound resources are enabled. In our experience just as important is the sense of ownership that a collection like this can promote – this is a record of our music, our cultural heritage – and it’s immensely valuable.” – Celia Duffy, Head of Research, National Centre for Research in the Performing Arts, Royal Scottish Academy of Music and Drama.

“As a folklorist, I would undoubtedly use this online resource with undergraduate and postgraduate students, many of whom have never heard this kind of music-making prior to study, or have participated as children in traditional music-making in the playground but never recognised this as

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traditional music. The potential uses of the resource are many. These include familiarisation with the range of traditional music genres, its sounds, and the use of examples for comparative study and comparative annotation, classification, transcription (words and music), and performance study, and stylistic analysis. The resource would also have a very significant role as a source of new repertoire for contemporary folk music performers.” – Dr Julia Bishop, National Centre for English Cultural Tradition at the University of Sheffield.

#### RECORDINGS OF CANONICAL CLASSICAL REPERTOIRE (1926-1956)

The Recordings of canonical classical repertoire (1926-1956) proposed here can be considered as an extension of the Beethoven material offered under the ASR project. These packages provide comprehensive source materials for the rapidly growing research area of performance style and interpretation, and researchers struggle and often fail to locate copies even of the best-known recordings. Professor Nicholas Cook, FBA, of the AHRC Research Centre for the History and Analysis of Recorded Music (CHARM) has said:

“I’d like to conclude by reiterating my admiration for the innovative [ASR] project in which you are engaged, and for the contribution it will make to broadening access to the heritage of recorded music in an educational context”.

Also from Professor Cook – “I see the exploitation of that hundred years of recorded repertory as one of the growth areas for musicology; our sound archives are full of primary texts that still lie at the margin rather than the centre of musicology. ... we have to develop musicologies of sound rather than of written texts if we are to build bridges between the study of 'art' music and the other repertoires which today surround it: jazz, rock, pop, world, and the rest.”

“The legacy of 20th Century western classical recorded music is now the object of an important area of musicology that investigates and analyses performance styles and trends. This collection will be used by every UK university music course as a primary resource for that study and will quickly become established as an invaluable resource. It will also be used by music practitioners in every music conservatoire in the UK, as a study and reference resource. For example, in the RSAMD course “Style and performance” which encourages students to be critical and reflective about the performance style they adopt, the historical context that this collection provides will be a main point of reference. It will have other users too, across the arts and humanities. Its existence will encourage research areas not only in musicology and performance, but also in interdisciplinary areas such as psychology of music (investigating topics such as changing notions of expressiveness in music, for example), audio engineering and computing science (investigating enhancement of older recordings, for example).


One very important aspect which makes this collection so valuable is that it brings together these recordings all in one place; recordings tends to move in and out of catalogues – to have one reliable, sustained source of reference in this area is quite unprecedented and of enormous value to musicians, scholars, historians, science and engineering as well as those with a general interest in music.” – Celia Duffy, Head of Research, National Centre for Research in the Performing Arts, Royal Scottish Academy of Music and Drama.

#### INSTITUTE OF CONTEMPORARY ARTS, LONDON (ICA TALKS)

The ICA Talks package offers unpublished research material, particularly useful for anyone investigating cultural and literary trends of the 1980s, approaches to writing, art history and modern poetry. This content is related to the ASR project Visual Arts interviews content package. Recordings professionally recorded by the Sound Archive in liaison with the ICA over a long period,

“The raw, unedited recordings of ICA Talks, held by the Sound Archive of the British Library, are the audio equivalent of X-ray, that is, potentially revelatory. These documented conversations / talks become increasingly more pivotal, more necessary in our understanding / analysis of contemporary culture, and much more, not only because of who said what, but also because of how it was said, and when. It is in the uniquely expressed speech inflections and rhythms of those artists, filmmakers and writers of the last few decades captured on tape that its possible to pin-point some of the crucial intellectual detours and cultural shifts of the late twentieth century, whether that be by hearing Derek Jarman’s obvious relish at publically reclaiming the word ‘queer’ (1980s), Ken Campbell’s

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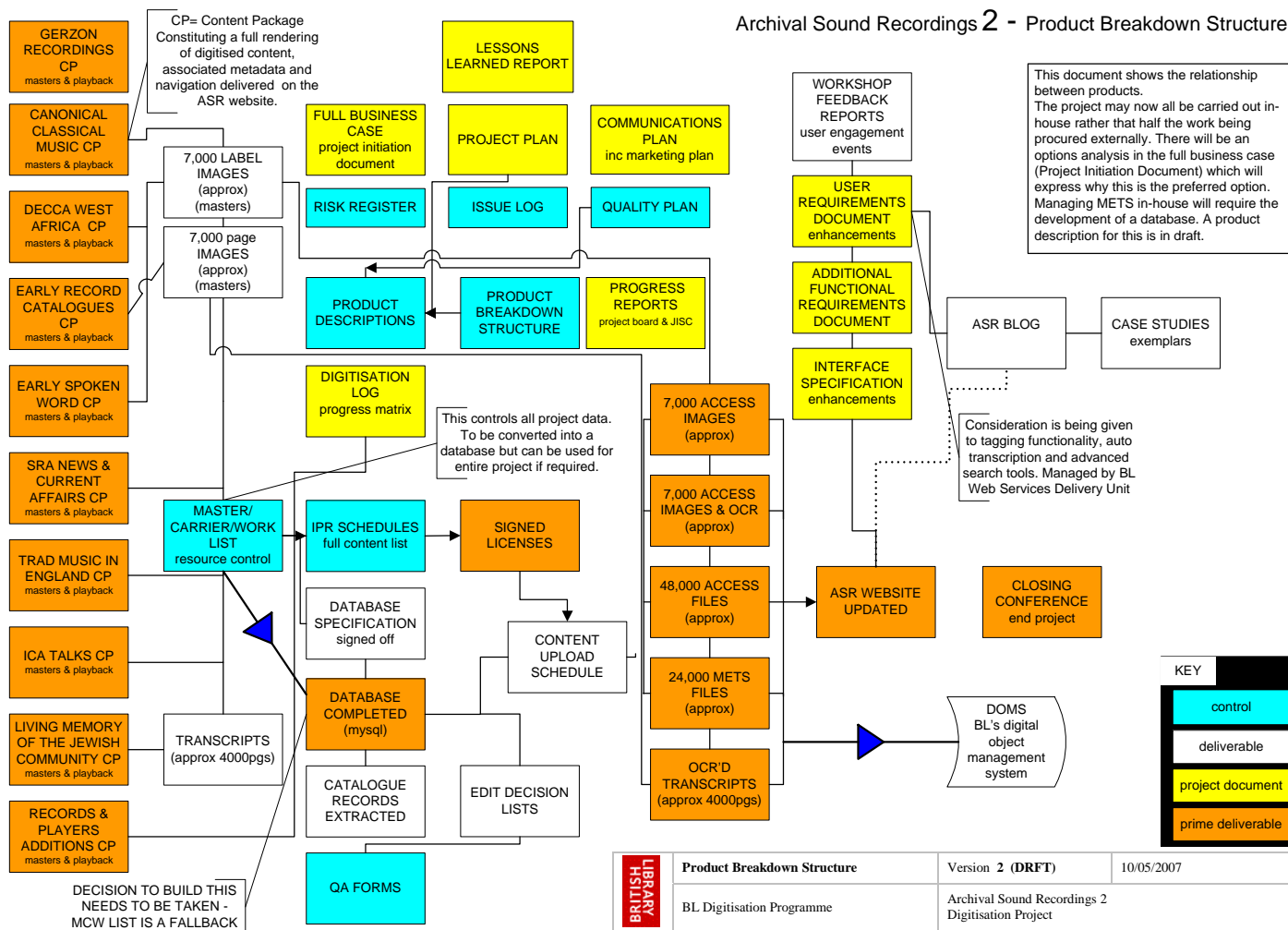
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convoluted digressions explaining the concealed connections between the writings of Philip K. Dick and Ken Dodd’s comic genius (1980s), or Salman Rushdie’s reading of The Satanic Verses on the day the book was withdrawn from sale by W.H. Smith. In making this material available in digital form to institutes of Higher Education and to students of a wide range of subjects, the British Library may, in part, curb at least some of the excesses of our increasingly 'fast-edit, image saturated' culture, and encourage students to re-learn the act of listening and through this listening begin to discern the significance of those voices that make up our cultural history.” – David Ellis, Writer-Performer / Director.


“The appeal of [this] package is that it could provide direct testimony from a wide range of cultural figures. In terms of theatre and media drama studies, an interview with Arnold Wesker has immediately apparent worth for the researcher and the teacher. However, in these increasingly eclectic, interdisciplinary and cross-disciplinary times in research and pedagogy, the cultural insights provided in archived interviews would be invaluable: I can see myself directing, say, my final level American Theatre students towards an archived interview with Norman Mailer in preparation for a seminar; students on contemporary cinema to the Neil Jordan and Derek Jarman material while Julia Kristeva, Salman Rushdie and Primo Levi could be extensively useful across a wide range of courses and module projects. With cultural shifts, I have to say that students are less good readers than they are listeners and in my experience they absorb and explore audio material extremely well. Likewise, for the academic researcher, the raw material of the audio archive provides an unfiltered – and even unguarded – bounty of critical mass.” “The acquisition of audio archive materials is proving increasingly important to my practice as a researcher and teacher in the UK HE sector. I have sent students away to listen to specific audio material in preparation for seminar and workshop activity or given a broad indication of available resources for students when they have assignments that are either formal essay, open presentations or even practical performance projects and experimental workshops.” – Dr Richard J. Hand, Reader in Theatre and Media Drama, University of Glamorgan.

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APPEDIX C7 – Product breakdown structure



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## APPENDIX C8 – Project Schedule

Please see separate MS Project document (PDF file).

## APPENDIX C9 – Rights Clearance Plan

The British Library’s Archival Sound Recordings 2 Project has a requirement to clear the Intellectual Property Rights in a large number of sound recordings. The recordings will be delivered online for educational purposes in both streamed and downloadable fomats. It is the intention to clear the streamed media for the widest possible access for educational proposes. The downloadable media will remain behind the authentication layer.

- ⇒ Assessments of each recording will ascertain its rights status.
- ⇒ The ASR project team will carry out initial research to ascertain provenance, ownership and contextual information.
- ⇒ Where necessary rights will be cleared in the recording and with authors, contributors and third parties.
- ⇒ Wherever possible rights will be cleared by the ASR Team.
- ⇒ The Library’s Legal Services Manager will oversee the clearances of sensitive material and will commission an external legal resource to clear these rights.
- ⇒ Documentation of the all clearance processes is imperative in order to ensure that the Library is protected from claims by third parties. To this end a clearance template will be drafted and this will be completed.
- ⇒ Await claims may be issued for so called orphaned works.
- ⇒ Rights in each digital object will be documented using a rights expression language (this approach is still to be evaluated).
- ⇒ Licences drafted under the ASR project will be reviewed for their suitability for the ASR2 clearance process.

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