

JISC DEVELOPMENT PROGRAMMES

Project Document Cover Sheet

e-Uptake PROJECT PLAN

Project

Project Acronym	e-Uptake	Project ID	
Project Title	Enabling Uptake of e-Infrastructure Services		
Start Date	01/04/2007	End Date	31/03/2009
Lead Institution	National Centre for e-Social Science, University of Manchester		
Project Director	Rob Procter		
Project Manager & contact details	Alex Voss, National Centre for e-Social Sciences, University of Manchester, Arthur Lewis Building, Oxford Road, Manchester M13 9PL, +44 (0) 161 275 1384		
Partner Institutions	National e-Science Centre, University of Edinburgh Arts & Humanities e-Science Support Centre, Kings College		
Project Web URL	http://www.e-researchcommunity.org/e-uptake		
Programme Name (and number)	e-Infrastructure Programme		
Programme Manager	Ann Borda		

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Document History

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0.1	25/06/2007	First draft - for comment by project team.
0.5	08/07/2007	Second draft – for comment by programme manager
0.6	16/07/2007	Third draft – after discussions with programme manager and chair of steering committee
0.7	25/07/2007	Near final draft circulated to all for final comments, next version to be approved at the project meeting on 6 th August.
1.0rc	01/08/2007	Final version for approval at project meeting
1.0	07/08/2007	Agreed version – with new project name



Project Plan for the Enabling Uptake of e-Infrastructure Services Project

Overview of Project

1. Background

The UK is entering a period in which significant distributed computing and data resources are being made available to all researchers and higher education staff in the UK. Different disciplines have engaged with these facilities to differing extents. For example, for some communities within high-energy physics and biomedicine these services are becoming essential to everyday work while other disciplines are currently investigating how they might match their needs. The expanding resources will lead to new forms of research and will promote wide-scale collaborations which, over time, will become accepted, essential components of normal research practice across all disciplines covered by the Research Councils.

In order to capitalise on the leading position which UK e-Science has established internationally and the opportunities this brings for the UK research and higher education community, the process by which members of this community can adopt e-infrastructure must be first understood and then made as smooth and well supported as possible. The aim of the e-Uptake project is to enable the wider adoption of e-infrastructure. It brings the expertise of a multi-disciplinary partnership that comprises leading members of the UK e-Science programme together with a wide variety of research communities in order to significantly improve our understanding of barriers to uptake, and to devise and implement coordinated strategies to overcome them.

The project is undertaken by a consortium of institutions with significant expertise in this area and the partners are already engaged in a number of activities addressing barriers to uptake covering a substantial subset of the research issues identified in the JISC call. As a result, the partnership is uniquely placed to pursue further work to understand the nature of barriers and use this as the basis for the development, through active engagement with user communities, of a coordinated set of responses to these barriers – such as outreach, education, training and exemplars.

2. Aims and Objectives

We will provide a consolidated understanding of user needs alongside the identification of gaps in the support needed for effective adoption of e-infrastructure. We will also create a repository of both information and selected support services that will build on existing world leading services but whose form will take account of the project's findings about user communities' requirements. In addition, the project outcomes will provide the basis for making a series of recommendations on how responses to barriers might be sustained and funded in the future.

Building on the three partners' ongoing work, this project will develop strategies aimed at increasing and widening adoption of e-infrastructure and significantly increasing the user-base of JISC-funded services. Involvement of actual or potential users of e-infrastructure services is a key element of this proposal: what we aim to achieve is to help foster a change in culture, in the way that researchers see their practice and the role that advanced information technologies play in their work. At the same time, we wish to provide service providers and technology developers with a sound grasp of problems as perceived by users.

In addition to the material outcomes of the work, we envisage that this culture change will help to achieve wider impact and sustainability by fostering an ongoing dialogue between service and technology providers, application developers and research communities. Both of these elements will feed into and benefit from other (JISC-funded) activities such as the e-Framework and VRE programmes. The work undertaken as part of the e-Uptake project is closely connected with the eIUS project, also funded under the Community Engagement strand, and we will actively collaborate with it to ensure that activities inform and complement each other. The ultimate aim of both projects is to establish paths to wider adoption, to embed usage of e-infrastructures in everyday research practice and to make such usage sustainable in the long term.

3. Overall Approach

The project will be structured around five main activities:

1. Desk-based research and systematic synthesis of current work being undertaken by the three partners within their respective communities will provide a baseline for the project's activities. This will be used to create a profile of UK e-Infrastructure service provision and to establish an initial typology of barriers. It will also ensure that the wider context of this work is taken into account and synergies with other initiatives effectively exploited.
2. A survey of research communities to distinguish between early and potential adopters, and the unengaged. This profiling will be based on data already collected by NeSC, NCeSS, AHeSSC and service providers, support organisations, etc.
3. A series of case studies will be conducted to understand barriers in detail, with their selection determined by findings from activities 1 and 2. The methodology used will be chosen to maximise the engagement with the communities while minimising intrusiveness. The main data gathering technique will be semi-structured interviews but we will complement this with other methods such as direct observation where appropriate.
4. The development of a coordinated set of responses to these barriers – such as outreach, training and exemplars – will be pursued with the active participation of the user communities to develop them. We will provide mechanisms that will allow users to feed their experiences back into the project and the development of the next iteration of responses.
5. Dissemination of project findings to the various stakeholders and activities aimed at fostering an ongoing process of reflection on e-Research and the development and usage of infrastructures in the communities.

An important aspect of the overall approach is to ensure that these five activities inform each other and that a balance is struck between teasing out general issues and developing widely applicable responses to common barriers on the one hand and catering for the specific needs of our different stakeholder communities (see section 6) on the other. A programme of workshops and evaluation activities will help to realise this aim.

It is also essential for the project to achieve and maintain strong stakeholder buy-in and to establish a community-driven process that will help sustain and expand on the work conducted beyond the project itself. Finding champions who can act as gatekeepers and facilitators for the engagement of different communities will be an important part of our study design. Furthermore, our aims can only be achieved by coordinating with other JISC and wider e-Science community engagement activities. A memorandum of understanding will be put in place with the JISC e-Infrastructure Use Cases and Service Usage models project to provide the basis for practical arrangements to coordinate activities and share data where appropriate. The project manager and the steering committee will be working to ensure coordination of the project with similar initiatives as listed under section 6.

4. Project Outputs

The full list of project deliverables is expected to expand as the project progresses and following its initial scoping phase. However, at the time of writing, the project is committed to producing at least the following deliverables that are mainly in the area of outreach, education and training. These are shown in

Figure 1 (next page) and can be divided into analysis, intervention, evaluation elements and supporting activities:

Analysis

A number of reports will provide a better understanding of the barriers that potential users face and gaps in or problems with the existing mechanisms aiming to address them, e.g., education and training programmes. These reports will help to inform the further development of technologies, services and support structures to address these issues.

Intervention

The project will itself produce a number of interventions aimed directly at overcoming barriers to uptake. These interventions will involve:

- the development of a UK “One Stop Shop” (cf. WP2.2) for access to event information, support material and support contacts;

- running outreach, education and training events across a range of disciplines including Arts and Humanities and the Social Sciences;
- the development of training and support material for these communities.

Evaluation

Continuous evaluation of the project's progress and impact will ensure that issues are identified and addressed early on and that appropriate action is taken immediately. In addition, summative evaluation will help document the project's achievements and provide the basis for future activities in this area.

Supporting Activities

In addition to these deliverables, the project will contribute to the development of a community portal supporting community engagement. This work will be undertaken in cooperation with the eIUS project and will provide a document repository and collaboration support. Dissemination of project outputs through the project partners' links with their stakeholder communities and through publications and events such as workshops will help to ensure the project has a significant impact.

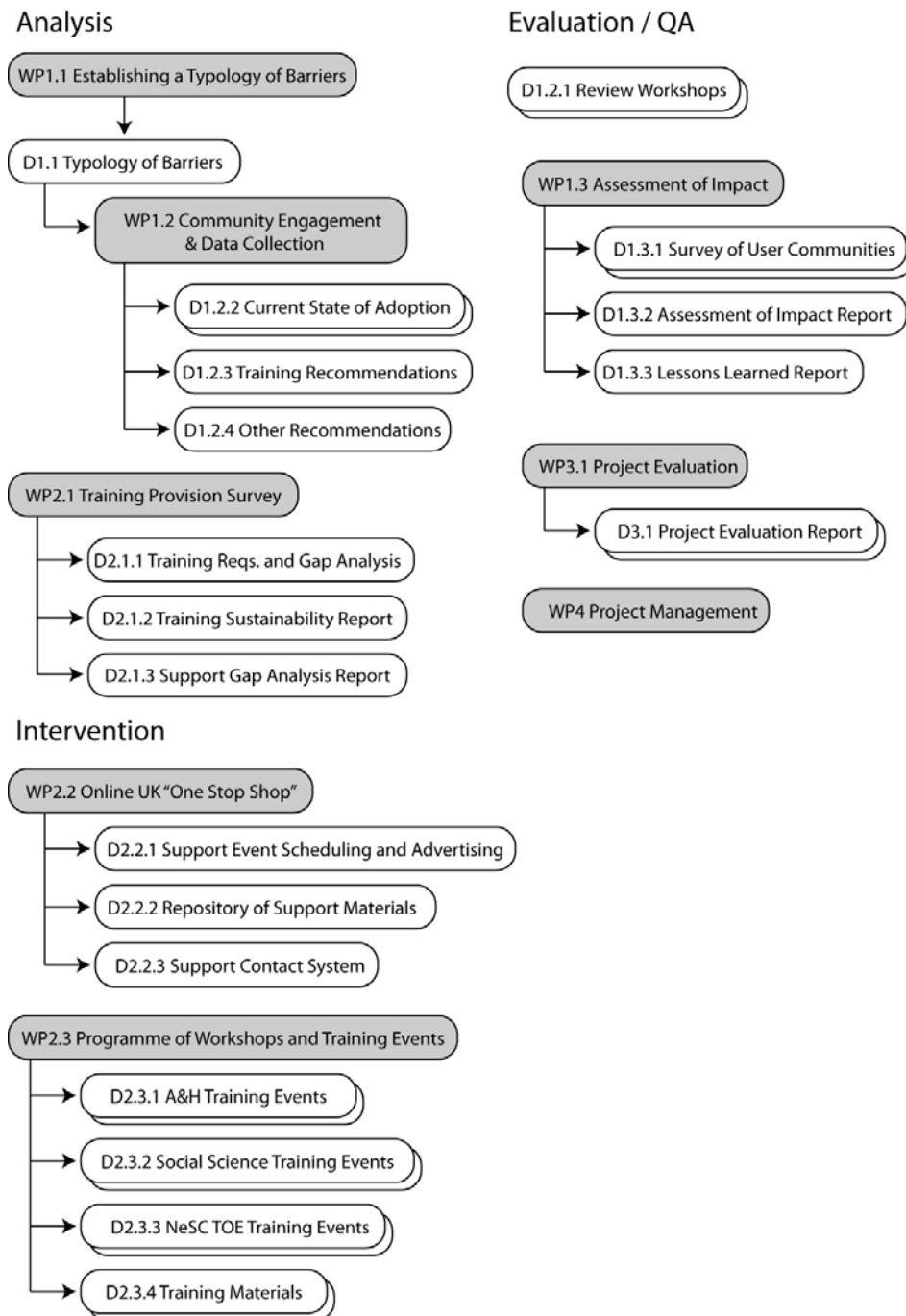


Figure 1: Work Packages and Deliverables

5. Project Outcomes

Work conducted in this project will contribute to our understanding of the barriers that people face when taking up e-Research, e-infrastructures and tools. Based on this improved understanding, the project will deliver strategies and mechanisms for addressing these barriers, leading to more adequate service provision, better design of tools, better training provision, increased awareness of offerings and events, improved understanding of the potential of e-Research and, last not least, a basis for an ongoing dialogue between resource and service providers, technologists and researchers.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
UK e-Infrastructure Resource Providers, e.g., national service providers such as NGS, Edina, Mimas, DCC, VizNet, NaCTeM, OMII, etc. but also regional and local service providers, e.g. campus level research computing	<p>Obtaining a better understanding of issues that people face in taking up e-infrastructure services and what can be done to address them. This will help increase the usage of services offered and thereby help service providers to demonstrably provide value for money. Sustainability of resources and services can only be achieved if usage is sufficiently broad to either warrant continued expenditure of public money or allow funding models based on cost recovery from the user communities.</p> <p>Support from UK resource providers is important as it will help to identify potential users and to analyse the barriers they are facing. In addition, it is essential that resource providers are involved in the formulation of recommendations and their implementation.</p>	HIGH
UK Research Community	<p>Obtaining a better understanding of what services are available and how these services might match their needs. Encountering fewer and lower barriers to uptake and obtaining support in overcoming what barriers remain.</p> <p>As the primary source of usage data, the support and cooperation of members of the UK research community is critical to the success of the project.</p>	HIGH
JISC	<p>Gaining information to guide the development of future strategic e-Infrastructure funding programmes as well as realising the benefits and increasing the up-take of existing services.</p> <p>As the project's funding body, JISC has a need for the outputs of the project to be of high quality, and for the project to achieve its overall aim to address barriers to uptake and increase usage of services.</p>	HIGH
e-Infrastructure Use Cases and Service Usage Models Project (eIUS)	Close cooperation and joint working with the eIUS project is considered to be essential to the success of both projects, in particular through data sharing and coordinated fieldwork activities.	HIGH
NCeSS / AHeSSC / NeSC	All partners in the project have an interest to increase uptake in the communities they are serving and to inform their own service provision, training and support activities.	HIGH
Related projects also investigating barrier to uptake and usage of e-Infrastructure, e.g., SUPER, OSI e-Infrastructure WG, OeSS, eIUS, e-Science Institute Adoption Theme, UTF/User Group, ESRC e-Infrastructure, AHeSSC	<p>Strong support is required from related initiatives in order to ensure the project develops and maintains a good reputation within the UK research community, and to help develop the project's methodology during the initial scoping phase. In addition, it will be essential to coordinate activities in order to avoid respondent fatigue.</p> <p>Related initiatives will benefit from the findings and lessons learnt from the e-Uptake project. They will also benefit from the development of a community of researchers working on the social shaping of e-Science.</p>	HIGH
Training and education	The project will serve to inform further	HIGH

related initiatives and other community engagement efforts, e.g., ICEAGE, NeSC TOE team, Open Science Grid outreach	development of training activities, will add to the corpus of training material available and an emerging global t-infrastructure.	
Hosting Institutions	Similarly, the hosting institutions have a need for the project to lead to an increased and adequate usage of e-Infrastructure services across the disciplines so as to improve the quality and impact of research undertaken. At the same time, they have a need for the project to inform the provision of local services.	HIGH
Other Funding Bodies	Other bodies funding e-Infrastructure services for the UK research community are expected to benefit from the project in the same way as JISC but have no financial stake in the success of the project.	MEDIUM

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent or Manage Risk
Key staff may leave or be unavailable	2	4	8	Expertise is spread across a number of individuals at each institution and between partners. Where possible, work packages will be re-allocated should this problem arise.
Researchers reluctant to engage	3	3	6	Each partner has established links with research communities and experience with work to engage researchers.
Difficulties in managing partnership may impact on project	1	4	4	All partners are experienced in working within consortium projects. A partnership agreement will be established early in the project and the project manager will work to avoid problems.
Project does not keep pace with e-infrastructure developments	2	2	4	Community network intended to assist with knowledge gathering.
Addressing barriers may turn out to be more difficult than envisaged.	2	3	6	Project will advise JISC and will work with stakeholders to find strategies beyond the project itself.
Reports not accepted or influential	2	3	6	Strong engagement with providers, with JISC and with user communities; exposure of drafts to the community for comment
Training material not adopted	1	4	4	Material will be made available for identified needs
Workshops not supported	1	4	4	Plan them to meet identified communities/needs; adequate advertising
Supporting systems not adopted by training providers	1	3	3	Ensure they are lightweight to use and clear added benefits
Barriers identified are not relevant or important barriers are missed.	1	5	5	Experience of project partners, formative evaluation and review workshops

8. Standards

The technical work packages will apply standards already widely used in e-Learning. They will be aligned both with standards defined or recommended by the OGF ET-CG¹ and the development of t-infrastructures in ICEAGE². As well as adopting standards defined in these contexts, the project will also contribute to their further development, especially in the area of defining curriculum modules suitable for application researchers. The website and community portal will comply with all appropriate mark-up and accessibility standards. Where appropriate, resources will be marked up with metadata complying with relevant standards such as Dublin Core, or those developed by the Information Environment Service Registry (IESR).

9. Technical Development

The technical deliverables (cf. WP2.2) will be based on existing functionality developed at NeSC but will be tailored for the needs of this project and its stakeholders. In addition, the individual modules will be integrated so as to provide a one-stop-shop for information. Federation mechanisms will be used extensively to ensure that content can be accessed by the various stakeholders in a way that is adequate to their needs (i.e., the information will be filtered to contain only items of interest) and so that they find information in familiar places (such as the NCeSS or AHeSSC websites).

The community portal (developed in collaboration with the eIUS project) will be based on off-the-shelf technologies, incorporating a document repository and collaboration tools. Technology choices will be made in the light of specific requirements gathered during the eIUS scoping study and early work in e-Uptake but a general options appraisal will be undertaken early on to facilitate rapid deployment. It is envisaged that the e-Uptake and eIUS projects share the same platform and that it will also be open to other initiatives who may make use of it by signing up to the memorandum of understanding (cf. sections 3 and 12).

10. Intellectual Property Rights

Under the three universities' policies on intellectual property (IP), all rights in IP created by their employees in the course of their employment will generally belong automatically to the university, except that the universities do not normally assert any claim to the ownership of copyright in scholarly materials. Results from this project will therefore be owned in the first instance by the universities as the employing institutions. The universities seek to maximise the commercial potential of their IP through their wholly-owned technology transfer companies. The project will put in place a partnership agreement which makes explicit where IP is to be held solely or jointly.

In accordance with the desires of the e-Infrastructure Programme it is proposed to release project deliverables under either a Creative Commons licence or, in the case of software, under an OSI-approved open source software license to maximise the benefit for the wider community.

Materials hosted by services are mainly expected to be created under the aegis of related projects (NGS, OMI-UK, DCC, etc.) which have a strong interest in making them as widely available as possible. It is not expected that negotiating suitable licensing arrangements will be difficult.

The eventual aim will be to provide services of sufficient value for them to be supported nationally by subscription and for these to form the UK component of an emerging cooperative federation of EU support services (the development of which is to be proposed as an EU FP7 project).

¹ Open Grid Forum Education and Training Community Group, <http://forge.ogf.org/sf/projects/et-cg>

² International Collaboration to Extend and Advance Grid Education, <http://www.iceage-eu.org>

Project Resources

11. Project Partners

The project partners are:

- University of Manchester (lead)
- University of Edinburgh
- King's College, London

A consortium agreement was signed on 31st July 2007, a copy of which has been sent to the programme manager. The full list of project team members are as follows:

NCeSS

- **Project Director and Principal Investigator (5%):** Rob Procter, National Centre for e-Social Science, University of Manchester, Arthur Lewis Building, Oxford Road, Manchester M13 9PL. rob.procter@ncess.ac.uk, +44 (0)161 275 1381.
- **Project Manager (40%):** Alex Voss, National Centre for e-Social Science, University of Manchester, Arthur Lewis Building, Oxford Road, Manchester, M13 9PL, alex.voss@ncess.ac.uk, +44 (0)161 275 1384
- **Co-Investigator:** Peter Halfpenny, School of Social Sciences, Arthur Lewis Building, Oxford Road, University of Manchester M13 9PL, peter.halfpenny@ncess.ac.uk, +44 (0)161 275 2493
- **Research Associate (100%),** Marzieh Asgari-Targhi, National Centre for e-Social Science, University of Manchester, Arthur Lewis Building, Oxford Road, Manchester M13 9PL, marzieh.asgari-targhi@manchester.ac.uk, +44 (0)161 275 1382
- **Administrator (10%):** Katy Middlebrough, National Centre for e-Social Sciences, University of Manchester, Arthur Lewis Building, Oxford Road, Manchester M13 9PL, katy.middlebrough@ncess.ac.uk, +44 (0)161 275 1383

NeSC

- **Co-Investigator:** Malcolm Atkinson, National e-Science Centre, University of Edinburgh, 15 South College Street, Edinburgh EH8 9AA, mpa@nesc.ac.uk, +44 (0)131 650 9833
- **Co-Investigator (5%):** David Fergusson, National e-Science Centre, University of Edinburgh, Old College, Edinburgh EH8 9AA, dfmac@nesc.ac.uk, +44 (0)131 651 4211
- **Research Associate (50%):** Mike Mineter, National e-Science Centre, University of Edinburgh, Old College, Edinburgh EH8 9AA, mjm@nesc.ac.uk, +44 (0)131 650 9832
- **Research Associate (50%):** Guy Warner, National e-Science Centre, University of Edinburgh, Old College, Edinburgh EH8 9AA, gcw@nesc.ac.uk, +44 (0)131 651 4290
- **Research Associate (20%):** Boon Low, National e-Science Centre, University of Edinburgh, Old College, Edinburgh EH8 9AA, boon@nesc.ac.uk, +44 (0)131 650 9822
- **Research Associate (10%):** John Scotland, National e-Science Centre, University of Edinburgh, Old College, Edinburgh EH8 9AA, scotland@nesc.ac.uk, +44 (0)131 650 9811

AHeSSC

- **Co-Investigator:** Sheila Anderson, Arts and Humanities Data Service, Arts and Humanities e-Science Support Centre, King's College London, 26-29 Drury Lane, London WC2B5RL, sheila.anderson@ahds.ac.uk, +44 (0)20 7848 1981
- **Co-Investigator:** Lorna Hughes, AHRC ICT Methods Network, Arts and Humanities e-Science Support Centre, King's College London, 7 Arundel Street, London WC2R 3DX, lorna.hughes@kcl.ac.uk, +44 (0)20 7848 2426
- **Research Associate (100%):** to be appointed

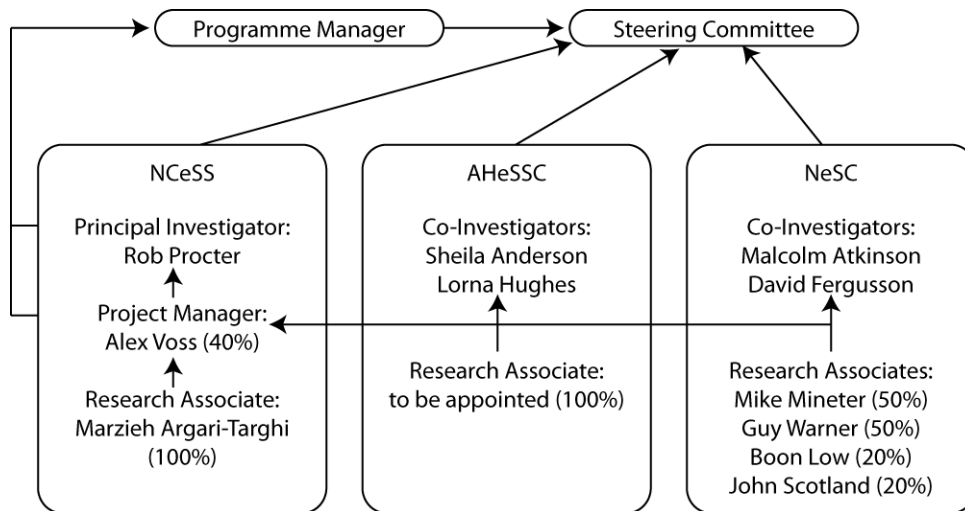


Figure 2 Project Organisation and Reporting

12. Project Management

The project manager (0.4 FTE) has responsibility for the day to day coordination of the project; including maintaining the project plan, developing the team, and contributing to the community engagement and dissemination work packages. The two full-time research associates at NCeSS and AHeSSC are primarily responsible for data gathering, community engagement, the coordination of workshops and training activities and the adaptation of training materials for the respective communities. Research associates at NeSC are responsible primarily for the development of the t-infrastructure elements, the development of generic training material as well as for running training events.

The work will be directed and supported by the co-investigators in the three partner institutions. The project will be supported by a joint steering committee with the e-Infrastructure Use Cases and Service Usage Models project (eIUS), to be established by JISC. This will be made up of representatives of key stakeholders, both within the research community and from the UK e-infrastructure service providers. At the time of writing the terms of reference for this committee were in the process of being drawn up.

Formal project meetings of the investigators, project staff, and programme manager will be held quarterly and will be minuted. Circumstances permitting, these meetings will be co-located twice yearly with the meetings of the eIUS project to facilitate coordination of activities between these projects. The project manager will have monthly telephone meetings with all project partners and will report to the programme manager at the same frequency. In addition, the project managers of both projects will work together and facilitate the flow of information between the projects as specified in a memorandum of understanding which will be signed by all project partners. The project manager and PI will report formally to the steering committee on a half-yearly basis. A provisional schedule for these meetings is given below:

1 st Quarterly Project Meeting	6 th August 2007	Manchester
2 nd Quarterly Project Meeting	November 2007	
3 rd Quarterly Project Meeting	February 2008	
4 th Quarterly Project Meeting	April 2008	
5 th Quarterly Project Meeting	July 2008	
6 th Quarterly Project Meeting	October 2008	
7 th Quarterly Project Meeting	January 2009	
Final Project Meeting	March 2009	

The schedule is only indicative except where concrete dates are given and may be adjusted according to the project's needs as well as to ensure that a project meeting takes place shortly before or after meetings of the steering committee so as to ensure optimum communication between the committee and the project.

13. Programme Support

The project team requests support from the programme and programme manager in the following areas:

- Alerting and introducing the project to contacts in related projects and initiatives.
- Servicing the joint project steering committee.
- Attending quarterly formal project meetings.
- Reviewing early drafts of project deliverables including progress reports and final report.
- Helping with the dissemination of results.
- Ensuring the recommendations are effectively communicated to JISC and JISC-funded services.

In addition, we would like to ask the steering committee to support the project by:

- Fostering and strengthening the links between the project and stakeholder communities; helping to engage new user communities
- Reviewing project outputs to ensure they are relevant and meet stakeholder needs
- Making recommendations based on the project outputs to appropriate committees
- Helping with the wider dissemination of the project's outputs
- Alerting the partners of developments relevant to the project

14. Budget

The budget submitted in the proposal has been adjusted to take into account the later start date of 1st April 2007, the reduced funding level and to increase the FTE available for project management to 40%. For a breakdown of the agreed budget see Appendix A.

Detailed Project Planning

15. Work Packages

The project consists of four work packages, each led by one of the project partners:

- WP1 will identify and study barriers to adoption, develop a taxonomy and identify common themes as well as spell out differences encountered (led by AHeSSC);
- WP2 will develop ways to address the barriers identified, primarily through training, outreach and education but also, in cooperation with the various stakeholders, through changes in service provision and support (led by NeSC);
- WP3 will provide a formative evaluation of the project activities, status, outputs and outcomes; it will provide a crucial element of steering in the iterative process that underpins the project methodology (led by NCeSS);
- WP4 will provide day-to-day project management and coordination with related projects, stakeholder activities and wider developments (led by NCeSS).

For a detailed breakdown of work packages into concrete tasks, a list of related deliverables and the timing of activities see Appendix B. As can be seen in the Gantt chart in appendix B, the individual work packages are largely self-contained and independent, making the project plan relatively robust but we expect that dependencies will exist at a more detailed level of planning within the individual packages. A more detailed workplan will be developed by the project manager in collaboration with the project team to facilitate (resource) planning and project control.

16. Evaluation Plan

Each work package will be carefully and continuously evaluated (by means of survey and evaluation forms, and interviews with participants, especially early adopters). These evaluations will directly inform development of subsequent activities, and refinement of training materials and documentation that will be delivered and maintained for the long term. This continuous process will enable us to develop a consolidated understanding of user needs across different communities and disciplines. The audience for this evaluation will be the e-Uptake project team, its investigators, the steering committee, and JISC.

The timing of each evaluation should allow sufficient time for a reasonable amount of progress to have been made within the work packages, yet enough time before their due date for any recommendations to be implemented. Evaluations feeding into the quarterly meetings will be discussed and action points noted in the minutes of these meetings. The project manager will be responsible for ensuring they are implemented.

The following non-exhaustive table indicates some of the key questions that this evaluation should address. A more detailed plan can be found in the description of work package 3 in appendix B.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
A number of months after publication	Reports	Are reports relevant to their target audiences? Do they reach these audiences?	Feedback from steering group	Evidence that the communities are reacting to the recommendations made in the reports
At regular intervals	Stakeholder and Community Engagement	How effective has the project been in soliciting input from stakeholders and wider communities?	Workshop feedback forms, review of community portal content and usage logs, feedback forms, survey of stakeholders	Feedback forms and surveys indicate that people are engaged and make contributions to the project work. Portal contents and usage logs show that people are using the portal and actively contribute to the development of content.

At regular intervals	Stakeholder and Community Engagement	Are stakeholders, communities and related efforts supportive of the aims of the project?	Feedback from steering group, feedback from stakeholder and communities.	Positive attitudes toward the project indicated.
At regular intervals	UK One-Stop-Shop (D2.2.X)	Is the system visible enough, does it attract sufficient numbers of visitors?	Log file analysis, web measurement tools	System attracts sufficient and sustained traffic (e.g., compared to existing offerings)
At regular intervals	Event Scheduling and Advertising System (D2.2.1)	Level of use by event providers and potential participants	No. of events and providers using system; No. of course participants stating this as a source they used.	Creating single point of contact for UK events
At regular intervals	Repository of Support Materials (D2.2.2)	Level of use and federation	Number of accesses and number of federated systems	Significant use of the material as measured by the number of downloads.
At regular intervals	Support Contact System (D2.2.3)	Willingness of contacts to be entered; usefulness to the community	Number of entries and accesses	Creating a single point of contact for training support

In addition to this formal evaluation, internal reflection on the progress of the project from the perspective of the project team will be a key part of preparing the bi-annual progress reports and final report.

17. Quality Assurance Plan

Timing	Quality Criteria*	QA Method(s)	Evidence of Compliance	Quality Responsibilities**	Quality Tools*** (if applicable)
Output	Website				
08/2007	Fitness for purpose	Review by project team and at community engagement events.	Sign-off by investigators, programme manager, and participants at community engagement events.	Investigators and programme manager.	
08/2007	Accessibility Legislation	Website follows W3C WAI guidelines.	Website passes automated accessibility checks.	Project manager.	Automated accessibility checking tools.
08/2007	W3C standards compliance.	Website follows W3C mark-up standards.	Website passes automated mark-up validation checks.	Project manager.	Automated mark-up validation tools.
ongoing	Effectiveness	Gathering usage statistics and eliciting feedback	Statistics and feedback show that the website is being used.	Project manager	Log file analysis tools
Output	Community Portal				
	Fitness for purpose	Review by investigators	The community portal serves the project's needs.	Investigators and project manager.	
	Other criteria see the eIUS project plan				
Output	Reports				
	Authenticity / correctness	Data gathering methods, feedback from and review by community at review meetings	Agreement by community representatives that material gathered is authentic and representative and that conclusions drawn are valid.	Researchers and report authors	
	Fitness for purpose.	Feedback elicited on preliminary drafts by PIs and programme manager.	Sign-off by investigators and programme manager.	Investigators and project manager.	
	Coverage	Systematic Review		Workpackage leader	

Timing	Quality Criteria*	QA Method(s)	Evidence of Compliance	Quality Responsibilities**	Quality Tools*** (if applicable)
Output	UK “One Stop Shop” (WP2.2)				
	Usability, accessibility, service standards, content quality, metadata compliance	Internal review within the NeSC TOE team	The internal review shows that the service provision meets internal quality criteria for usability, compliance with service and metadata standards and that the content is of high quality.	NeSC	
	Usability, accessibility, service standards, content quality, metadata compliance	Review within e-Uptake project	Review conducted within the formative evaluation work package (WP3) shows that quality criteria are met.	NCeSS	
	Usability, accessibility, service standards, content quality, metadata compliance	External review in the context of wider e-Science TOE activities this work package links up with (e.g., NGS, ICEAGE, EGEE, OMII-EU)	External partners within these projects judge the service provision to be of high quality with respect to these criteria.	NeSC	
	Usability, accessibility, content quality	User feedback	Users find the “one stop shop” easy to use and judge the content to be relevant and of high quality.	NeSC	Feedback forms
	Service standards, metadata compliance	Feedback from stakeholders federating content	Stakeholders federating content find it easy to do so and can effectively integrate content into their own service provision for the communities they serve.	NeSC, AHeSSC, NCeSS	

Timing	Quality Criteria*	QA Method(s)	Evidence of Compliance	Quality Responsibilities**	Quality Tools*** (if applicable)
Output	Workshops and Training Events (WP2.3)				
	Quality of event organisation and content, adequate scoping and relevance	Feedback from attendees	Ratings indicate	NeSC primarily, other partners where events are aimed at their communities.	Event feedback forms
	Compliance with best practice and applicable standards	Internal review	Workshops and training events make use of resources, best practice definitions and standards as defined within ICEAGE and the OGF TOE-CG.	NeSC	
	Training Material: quality, usability, scope and relevance	Internal review	Training material is of high quality, easy to use and appropriate in scope and content for the intended target audience.	Partners each for their communities	

* **Quality Criteria:** specify the criteria against which the quality of the output will be measured, e.g. fitness for purpose, best practice for processes, adherence to a specific standard or specification, usability, accessibility, validity, etc.

** **Quality Responsibilities:** list who is responsible for monitoring and ensuring the quality.

*** **Quality Tools:** list any tools to be used to help ensure the quality.

18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
May 2007	Presentation of a poster at the German e-Science Conference in Baden-Baden.	All	Establish contacts with colleagues from the German and wider European Grid initiatives.	
May 2007	Project website.	All	Help raise initial awareness of the project.	
June 2007	NGS Users Forum	NGS Users	Raise awareness of the project. Engage with UK research community.	
June 2007	e-Research Australasia (Ann Borda presenting)	e-Research community in Australia and the Asia Pacific Region	Increase the profile of the project overseas.	
September 2007	Paper presentation at AHM2007	UK e-Science Community	Increase the profile of the project in the UK and invite participation	
October 2007	e-Social Science 2007, Michigan, US	e-Social Science Community	Increase the profile of the project overseas.	
Ongoing	Conference attendance/presentations/posters	UK researchers, UK e-Infrastructure Service Providers	Raise awareness of the project. Engage with UK research community.	
Ongoing	e-Uptake Workshops and Training Events	UK researchers and UK e-Infrastructure Service Providers	Events specifically designed to engage the UK research community and service providers.	
Ongoing	Post project updates on relevant mailing lists and in newsletters	UK researchers and UK e-Infrastructure Service Providers	Advertise events and raise awareness of project activities	
March 2009	e-Uptake Final Reports		Disseminate the final outputs of the project.	

19. Exit/Sustainability Plan

In order to make the project's achievements sustainable beyond its lifetime, we will implement

Project Outputs	Action for Take-up & Embedding
Website	The website will be produced as part of a wider effort to build a community portal for e-Research. NCeSS is committed to supporting this effort for the duration of five years from the project start.
Community process	NCeSS, NeSC and AHeSSC will continue to develop activities in their core communities. Further development of the UK network of those engaged in training and education will have self-sustaining impact.
Technical Deliverables	Initiatives to fund and further develop support services. NeSC views these services as foundations to its continuing support for training and education to support uptake of UK e-infrastructure. Partners will include support for the technical deliverables as part of their own sustainability strategies.

Appendixes

Appendix A. Project Budget

Re-worked budget with £500k total support from JISC

Details of the budget have been deleted from the public version of this project plan.

Appendix B. Workpackages

Workpackage and activity	Earliest start date	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Responsible
<p>WORKPACKAGE 1: Barriers to Adoption</p> <p>Objective: Identify and report on barriers to adoption</p> <p>Workpackage 1.1: Typology of Barriers</p> <ol style="list-style-type: none"> 1. Collect information about existing and past initiatives via desk research and interviews with selected stakeholders 2. Develop and test methodology, e.g., survey of practitioners, complemented by interviews where feasible 3. Design of an initial typology of barriers 4. Review of typology <p>Workpackage 1.2: Community Engagement & Data Collection</p> <ol style="list-style-type: none"> 1. Identify and categorise adopter communities 2. Gather material on specific case studies 3. Data analysis 4. Liaison between project and communities practitioners 5. Develop and run review workshops 6. Synthesise material gathered so far into report on current state of adoption 7. Assessment of existing training provision 8. Assessment of barriers not related to training <p>Workpackage 1.3: Assessment of Impact</p> <ol style="list-style-type: none"> 1. Development of Quality Control tools and methods for training events and materials 2. Targeted surveys towards end of year 1 and 2 3. Targeted information gathering workshops 4. Analysis in conjunction with service providers 5. Development of summary report, incl. Roadmap for proposed further developments 	01-04-2007	<p>31-03-2009</p> <p>01-08-2007</p> <p>01-09-2007</p> <p>01-09-2007 3 monthly 01.05.2008</p> <p>01.04.2008 throughout</p> <p>01.05.2008 01.05.2008 01.10.2008 01.04.2009 01.05.2008 01.05.2008</p> <p>01.02.2008 01.02.2009</p> <p>01.02.2009</p>	<p>Research notes and data</p> <p>Survey instrument, data, and analysis</p> <p>D1.1 Typology of Barriers Report To feed into each quarterly meeting</p> <p>Categories of adopter by community</p> <p>User case studies by subject</p> <p>D1.2.1 Review Workshops D.1.2.2 Current state of adoption report</p> <p>D 1.2.3 Training Recommendations D 1.2.4 Other recommendations report</p> <p>D1.3.1 General Survey of user communities data</p> <p>D1.3.2 Assessment of Impact Report D1.3.3 Lessons Learned report</p>	AHeSSC

Workpackage and activity	Earliest start date	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Responsible
WORKPACKAGE 2: Training and Awareness				
D2.1.1 Training Requirements and Gap Report	01-06-2007	01-09-2007 01-12-2007 01-04-2008 01-09-2008 01-02-2009	D2.1.1 Training Requirements and Gap Report	NeSC
D2.1.2 Training sustainability report	01-07-2007	01-09-2008 01-10-2008	D2.1.2 Training sustainability report Informed by task D2.1.1 with additional input gathered from e-infrastructure providers and input from W2.3, WP1. Update to be reviewed at All Hands meeting 2008	NeSC
D2.1.3 Training gap analysis report	01-06-2007	01-08-2008 01-09-2008 01-12-2008	D2.1.3 Training gap analysis report Update to be reviewed at All Hands meeting 2008	NeSC
D2.2.1 UK Event Scheduling and Advertising System				
1. Technical Platform	01-06-2007		Basic functionality exists for managing and advertising events, further work needed to provide community-specific (two-way) federation mechanisms (e.g., RSS feeds)	NeSC
2. Rebranded version of existing service		01-09-2007		
3. Advertising and content seeding	01-09-2007	01-04-2009	As we survey training provision, we will also advertise our register of events	
4. Added functionality		01-12-2008	Integration into common access framework; D2.2.1: UK Event Scheduling and Advertising System	
D2.2.2 UK Specific Repository of Support Materials		01-07-2007		NeSC
1. Rebranded version of existing service		01-09-2007		
2. Added functionality		01-10-2008	Integration into common access framework; D2.2.2 UK Specific Repository of Support Materials	
D2.2.3 UK Support Contact System				NeSC
1. Preliminary version	01-07-2007	01-08-2007	Web-pages based: collated via existing UK and international contacts of partners	

2. Design for integrated system	01-08-2007	01-11-2007	Determine how this service is to be integrated with D2.2.1,2 - to be easily searched, extended and perceived as part of an integrated service to users. This will be based on related ICEAGE developments (a people's database for students).
3. Complete		01-04-2008	D2.2.3: UK Support Contact System
W2.3 Programme of workshops and training events			In virtuous cycle with WP1, WP2.1 activities.
D2.3.1 A+H training events	01-09-2007	01-02-2009	Rolling schedule with events for 3 months horizon
D2.3.2 Social Science training events	01-09-2007	01-02-2009	Rolling schedule with events for 3 months horizon
D2.3.3 NeSC TOE training events	01-09-2007	01-02-2009	Rolling schedule with events for 3 months horizon
D2.3.4 Training materials	01-09-2007	01-02-2009	Tested in events and available for use by other institutions and online learners.

Workpackage and activity	Earliest start date	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Responsible
WORKPACKAGE 3: Evaluation				NCeSS
<u>Objective:</u> Continuously evaluate the work packages to inform the development of subsequent activities; ensure that the project as a whole remains focused while being responsive to changes in its environment; ensure that the project activities contribute to the project outcomes and are carried out adequately.				
1. Write evaluation plan for each work package and deliverable.	01-04-2007	31-08-2008	Evaluation plan for work packages and deliverables	PM, PI, Co-Is
2. Review of (JISC funded) services not yet engaged in project activities	01-04-2007	31-03-2009	Review to be prepared for every quarterly project meeting	PM, NCeSS and AHeSSC RAs
3. Review of user communities not yet investigated	01-04-2007	31-03-2009	Review to be prepared for every quarterly project meeting	PM, NCeSS and AHeSSC RAs
4. Review of methodology	01-04-2007	31-03-2009	Assessment of the methods used to study barriers	PM, NCeSS and AHeSSC RAs
5. Dissemination activities	01-04-2007	31-03-2007	A review of the dissemination activities, prepared for each quarterly meeting	PM
6. Review of work package and deliverable progress and quality	01-04-2007	31-03-2009		
7. Surveys of perceptions of training provision		31-03-2009		
8. Evaluation of reports	01-04-2007	31-03-2009	A short review of each draft report focusing on completeness, quality, relevance to target audience. To feed into final version.	PM, WP leaders
9. Evaluation of technical deliverables as per section 16.	01-04-2007	31-03-2009	An assessment according to the project evaluation plan (how does the deliverable contribute to the project as a whole) and the work package evaluation plan (see above)	PM, WP leaders
10. Evaluation of community engagement activities	01-04-2007	31-03-2009	A review of community engagement activities and their impact	PM, WP leaders
11. D 3.1: Evaluation Report		30-09-2007 31-03-2008 30-09-2008 31-03-2009	D 3.1: Evaluation report, containing summaries of all aspects of the evaluation	PM

WORKPACKAGE 4: Project Management				
Objective: Manage project and support and engage project partners				
1. Provide content for JISC website	01-4-2007	01-05-2007	Project description on JISC website	PM
2. Write project plan	01-04-2007	30-06-2007	Project plan agreed with programme manager	PM, PI, Co-Is
3. Establish collaboration and project management infrastructure	01-04-2007	30-06-2007	Technical and organisation infrastructure in place and agreed by project partners.	PM
4. Establish branding mechanisms for the project	01-06-2007	31-08-2007	Logos and document / presentation templates, website to use this branding	PM
5. Develop memorandum of understanding that provides a basis for coordination with the eIUS project	01-04-2007	30-09-2007	Signed memorandum of understanding	PM, PI, Co-Is
6. Report to programme manager on a monthly basis (informally) and provide formal reports to programme manager and steering committee on a half-yearly basis.	Throughout, monthly		Project reports	PM, PI, Co-Is
7. Ensure liaison with similar activities, esp. eIUS				PM, steering group
8. Review stakeholder analysis, risk analysis	Throughout, quarterly		Review to be prepared for every quarterly project meeting	PM, PI, Co-Is
9. Update dissemination plan	Throughout, quarterly			
10. Ensuring delivery to project completion	throughout			
11. Organise project meetings	01-04-2007	31-03-2009	Meeting invitations, agendas circulated and arrangements for the meeting in place	PM
12. Manage project budget	01-04-2007	31-03-2009	Budget status reports	PI, PM, Co-Is
13. Ensure implementation of exit strategy	30-10-2008	31-03-2009		
14. Write final project report	31-03-2009	31-05-2009	Final Project Report	