



JISC Project Plan

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- *Please expand tables as appropriate.*
- *Fill in the information for the header, e.g. project acronym, version, and date.*
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Overview of Project

1. Background

In recent years.....Virtual Learning Environments (VLEs)

VLEs have proved to be useful tools in facilitating staff in organising educational resources and activities in a hierarchical structure representing the structure of Programmes and Units. While they are excellent vehicles for **delivery of materials**, they are not ideal mechanisms for the **management and curation** of materials. There is an urgent need for a repository which focuses on the educational process and the storage, retrieval and sharing of educational materials which can be used to populate VLEs.

2. Aims and Objectives

The University of Southampton has taken the strategic decision to develop a repository for educational materials using its own well-established EPrints research repository software as the mechanism. The aim is to use a co-design process approach both to specify and to implement the details of the system which will be deliverable and sustainable. This will extend and embed the EPrints software within the educational domain. In doing so, we will develop a richer understanding of processes of institutional change and integration at both a strategic and discipline level.

3. Overall Approach

The EdSpace repository will be a social site providing a location in which both staff and students can share resources. This site will provide metadata, tagging and semantic mark-up mechanisms for the items to be stored. A range of local (discipline-based, School, Faculty, cross-institutional and University-wide) and external tools will access the repository using services interfaces. There will be service layers between the tools and the repository itself. These will include the annotation of items drawing on an educational ontology or other metadata schemas. We will identify and create a range of appropriate access permissions applying to items and versions of items.

4. Project Outputs

The EdSpace website: <http://www.edspace.ecs.soton.ac.uk/>

The EdSpace Blog: <http://blog.lsl.ecs.soton.ac.uk/edspace>

Project Acronym: EdSpace
 Version:1.3
 Contact:Debra Morris
 Date:23/11/07

The EdShare repository complete with appropriate services.
 We will use processes of co-design and engagement with our major partners to ensure commitment to cultural and practice change across the institution.

Dissemination will include major reports which identify, discuss, evaluate and develop conclusions around the issues on which the project is focussed.
 Briefing materials and training activities will also be developed as an aspect of our work as partners in the JISC Repositories Support Project.

5. Project Outcomes

Project Steering Committee reporting to the relevant University Committees as appropriate including: (Education Policy Committee, Academic Quality and Systems Committee, eLearning Strategy Committee);

Development of Project standards for documents (requirement specs, glossaries, non-functional requirements); versioning, configuration and change management processes; tracking requirements.

University, School and discipline engagement with the commitment both to use, to contribute to and to develop further an institutional learning repository. Facilitation of a cultural shift in the institution to engage fully with technology-enhanced learning to enrich the student experience. This shift will support the delivery of effective learning and enable increased collaboration, cross-fertilisation and integration across the delivery of learning and teaching across the University.

6. Stakeholder Analysis

There will be stakeholders (partners) throughout the institution, at all different levels and this is a first formulation of who/what they are:

Stakeholder	Interest / stake	Importance
University Executive Group – incl. V-C & DVC	Essential	High
Deputy Vice Chancellor Learning & Teaching	Essential	High
Education Policy Committee	Essential	High
eLearning Strategy Committee	Essential	High
University Central Services – incl. Information Systems Services/Library/Student Services/Learning & Teaching Enhancement Unit	Essential	High
Deans of Faculty	Desirable	Medium
University Change Agents	Essential	High
Heads of School	Desirable	Medium
Deputy Heads of School, Academic	Essential	High
Faculty & School Learning & Teaching Co-ordinators	Desirable	Medium
Educational Development Network Group	Desirable	Medium
Learning Technologists and Learning Developers	Desirable	Medium
School Liaison Librarians	Essential	High
Range of student cohorts	Essential	High

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk

Staffing	2	3	6	Close liaison and effective communication channels across the lifetime of the Project and beyond
Organisational	2	4	8	Inclusivity and accessibility of learning resources – preparedness of academic groups to collaborate and contribute to the work of the Repository
Technical	1	5	5	Access to EPrints architecture and software
External suppliers	1	3	3	Blackboard Virtual Learning Environment
Legal	2	4	8	Development, identification and dissemination of relevant frameworks for deployment of these new relationships, mechanisms, resources and frameworks for working

8. Standards

We are aware of a range of standards being relevant and will work with them where appropriate. (IEEE LOM and Dublin Core)

Name of standard or specification	Version	Notes
		Appropriate metadata standards for repository content will be investigated and evaluated as part of the project (Work Package 4).
IEEE LOM		
OAI-PMH		For metadata harvesting
OAI-ORE		For object reuse and interoperability
SWORD		For repository deposit
SWAP		Scholarly Works Application Profile
XHTML		For project website

9. Technical Development

EdSpace will adopt relevant technical standards (such as OAI) in order to improve interoperability between repositories and is committed to the service-oriented approach of the JISC e-Framework for Education and Research. Repository development will be carried out mainly by the EPrints team at Southampton who have several years experience in this field of development and many years experience of working with and supporting third party clients. Extra management activity has been identified within Southampton specifically to integrate the technical development and outcomes of this Project with the parallel development of the EPrints platform and the existing institutional research repository.

10. Intellectual Property Rights

This project is part of a continuing exploration of the open source, open access environment. Metadata schema and repository enhancements will be part of EPrints open source software available to the community. As much as possible of the content will be made available on open access.

It is recognised that making material in the HE learning and teaching field available on open access poses particular issues relating to copyright restrictions. Workpackage 7 will provide an overview of these issues and provide a framework within which the project outcomes will be delivered. Reference will be made to existing practice within the institution in respect of the e-Prints research repository and advice from University Legal Services. The University is committed, at the highest level, to the repurposing of material held in the repository for learning and teaching.

Project Resources

11. Project Partners

University internal partners – academic Schools, Service groups, communities of practice, a range of Units and individuals.

12. Project Management

- **Project Director:** Hugh Davis, University Director of Education with responsibility for eLearning
- **Project Manager:** Debra Morris, University Library Lead for eLearning
- **Project Steering Group:Chair:** Hugh Davis; Mark Brown (University Librarian); Les Carr (Director of Eprints Team), Claire Chappell (SUSU VP Education & Representation), Rosalynd Jowett (Chair, University eLearning Implementation Group), Debra Morris (Project Manager), Marion Phillips (Director of Student Services); Bob Price (ISS Learning & Teaching Support Services Manager); Su White (Project Evaluation and Dissemination Lead)
- **Core Project Team:** Hugh Davis, Les Carr, Jessie Hey, Tim Miles-Board, Debra Morris, Su White
- **Project Technical Team:** Les Carr (Technical Director), Tim Miles-Board (Technical Manager), Sebastien Francois

The project will be managed by the Project Manager at Southampton, who will cross-manage all of the work packages to ensure the cohesion of the overall project and liaise with the EPrints team within the Department of Electronics and Computer Science (ECS). The Project Manager will join the existing Institutional Repository Steering Group at Southampton which meets fortnightly and will liaise regularly with all partners via email, telephone and regular face-to-face meetings. The Project Manager's physical base will be in the LSL Laboratory, ECS at the University. This location physically integrates the individual with the ECS team.

13. Programme Support

- Indications for significant reporting routes given the cross programme relevance of this Project.
- Implications of reporting routes for different JISC Committees and managers.
- Where required, we will make use of the JISC Repositories Support Project

14. Budget

See Appendix A – no changes since the Proposal

Detailed Project Planning

15. Workpackages

See Appendix B for a detailed presentation of all of the Work Packages.

16. Evaluation Plan

There will be both formative and summative evaluation. Formative evaluation will take place at the end of each of the workpackages to ensure that objectives were met, and any lessons learned incorporated into further work. Summative evaluation will take place at the end of the project as part of the final report.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Ongoing - formative	Overall implementation of project	Have milestones been met on schedule and to budget? Is project management effective?	Assessed in regular progress reports to JISC; monitoring of progress at project meetings	Workpackages completed on time and to budget; approval of documentation by JISC
Ongoing	Outreach to academic and service partners	Are dissemination and advocacy activities targeted appropriately?	Feedback; peer review	
Months 8-18	Impact of EdShare within the educational community	Is EdShare being successfully populated? Are the materials being used?	Monitoring number of academic educators engaged in deposit, number and variety of items in EdShare, and ways in which content is being used	Levels of activity indicative of successful adoption, integration and engagement
Months 17-18 Summative	Overall achievements of project, and its usefulness to academic community and institutions	Have the aims and objectives been met? Was the methodology effective? What lessons have we learnt? What are the implications for future work?	JISC final report	Approval of Final Report

17. Quality Plan

Output					
Project management (WP1)					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Ongoing	Project outputs delivered on time and fit for purpose; adherence to JISC project management guidelines	Evaluation process; project meetings providing monitoring and feedback	Through regular progress and final evaluation reports delivered to JISC; correspondence with programme manager; outputs completed on time and documentation made available on project website	Project manager, Programme Manager and Project Director.	

Output					
Environmental assessment					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 1-6	Validity; fitness for purpose	Methodology for scoping academic community approved by Project Steering Group draft report circulated to Group for comments	Approval of methodology and applicability of report findings	Project Core Team, Project Steering Group	

Output					
Establishment of Pilot Repositories					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 2-12	Fitness for purpose; compliance with technical standards; usability and	Monitoring by Project partners; consultation with and feedback from academic community	Partner approval; population of Repository; positive user feedback	Technical Team, Project Core Team, Project Steering Group	

	accessibility for target groups				
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Output					
Designing metadata: Analysis and Structures					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 4-18	Compliance with appropriate standards; awareness raising for copyright	Consultation on IPR and metadata for materials; review of rights issues in HE educational domain.	IPR policy developed and copyright documentation for users in place	Technical Team, Project Core Team	

Output					
Software enhancement and integration					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 3-18	Usability and accessibility of resources	User consultation on design, metadata and overall usability aimed at depositors as well as multiple audiences; survey of partners and their perceptions of repository	Positive feedback from user surveys; successful population of IRs; breadth of object types and discipline domains of materials held in repository	Feedback from partners. Project Core Team. Technical Team.	

Output					
Liaison and advocacy					
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 3-18	Appropriate support for educators as depositors	Development of communities of practice composed of active depositors; advocacy materials	Materials deposited and available for use; cultural shifts	Learning & Teaching Advocates	

Output	Rights issues				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 6-18	Understanding of rights issues in educational resources	Build on initial work of the Research Repository	Feedback from users and other interested parties;	Project Core Team; Technical Team; Project Steering Group	

Output	Evaluation and assessment of author behaviours				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 12-18	Identification and evaluation of the Repository in action	Understanding behaviours, attitudes, relationships and pedagogical shifts in educator communities	Feedback from users and other interested parties;	Project Core Team; Technical Team; Project Steering Group	

Output	Repository Curation and Preservation of Materials Deposited				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 3-18	Liaison with PRESERV2 for discussion of relevant preservation policies and activities	Build on the work of PRESERV2	Appropriateness and relevance of policies and activities	Project Core Team; Technical Team; Project Steering Group	

Output	Publicity, Dissemination and Impact				
Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Months 1-18	Understanding, awareness, recognition, and visibility for the Repository within and beyond the	Website, Blog, publicity and training materials as well as traditional dissemination across the sector	Completion of communication loops back to members of the Project team	Project Core Team; Technical Team; Project Steering Group	

	University			
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18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
Sept. 2007	Presentation	Senior University, University Executive Group	Engagement & support	
Oct. 2007	Web site	University, JISC partners & peers		
Oct. 2007	Blog	Project partners, University, JISC partners & peers		
	Seminar			
	Presentation			
	Conference paper			
	Published paper			
	Published paper			

Dissemination of progress and outputs will be through a project website, and a series of reports. The web site will make available all of the project publications, reports and presentations, and these will be deposited within the University Research Repository.

Where appropriate the Project Manager and other Project Core Team members will submit papers to open access journals such as *Ariadne*, and make presentations at JISC as well as other meetings and conferences.

Academic input from the disciplines will be reflected in workshops, focus groups and other mechanisms for engagement with the process to foster community awareness of the project.

Timing	Dissemination Activity	Audience	Purpose	Key Message
Throughout duration of project	Project website	Multiple – learning & teaching, library, and general audiences	Raise awareness and provide key information/documents relating to the project	Aims and progress of project
Months 3-18	Presentation and discussion in appropriate forums, committees, working groups or other events across the University	Multiple – across the University community	To share knowledge of and promote the repository; to publicise the project as broadly as possible	Benefits of Learning Repositories and cultural change
Months 3-9	Environmental assessment report	Stakeholders, repositories, elearning & pedagogy community	Raise awareness of the success criteria, and the potential barriers and incentives for the participation of the academic community	Strategy and success criteria of project
Months 3-12	Technical report	Stakeholders, repositories, elearning & pedagogy community	Outline functionality and metadata standards for educational outputs	Suitable standards and software for these and future Learning &

				Teaching repositories
Months 16-18	Final report	JISC, key partners, University and wider community	Review project and evaluate lessons learnt	Key findings of project
Throughout project	Mailing lists	JISC, project team, and wider community	Discuss progress of the project and exchange experience	Project news, discussion, and exchange of experience
Months ongoing	Identifying relevant conferences and publications for presentation	Various, depending on conference and journal – repositories, elearning, pedagogic, cognate discipline communities of practice, service groups	Publicise project findings	Progress of project, dissemination of project outcomes and findings
End of Project	<i>Activity yet to be identified</i>	Partners, repositories, elearning & pedagogy community	Raise awareness, launch new stage for repository	Benefits and use of repositories for academic learning and teaching communities

19. Exit and Sustainability Plans

Project Outputs	Action for Take-up & Embedding	Action for Exit
Institutional learning & teaching repository	Advocacy, engagement and dissemination activities; clear user documentation; technical documentation, key strategic policy initiatives.	Access and maintenance
Metadata lessons	Embedded within the Repository	
Rights framework	Advocacy and documentation	IPR – processes for the deposit, use and re-use of objects in IR documented. Guidelines made available via the Repository.
Project management documentation	Core documents archived in JISC records management system. Some documents also made available on project website	Ensuring accessibility of documents and website maintenance. Documents retained on project website for 3 years after project completion
Understanding of how significant outputs are characterised within the learning & teaching community, how they are	Findings disseminated through articles and/or papers in relevant journals and conferences.	Preservation and access– articles/papers made available on project website and deposited in the Research Repository

used and re-used		
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The participants in the partnership are committed to creating a sustainable institutional learning & teaching repository. The University will take responsibility for the long-term sustainability of the EdShare repository. The project will help the institution to assess the best options for promoting the relationships and attitudes which make this sustainable. Ongoing communication between core EPrints Services in ECS, EdShare and the other Southampton repositories will support the sustainability of all repositories at Southampton. Sustainability of the content itself will be addressed in the curation and preservation work package (WP 9) and will reflect best sector practice as developed in other Projects. This will reference JISC funded work in repository preservation.

Appendixes

Appendix A. Project Budget

Appendix B. Workpackages