

**ProjPlanAmended21Feb < Projects/Flame < TWiki**

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# FLAME Project Plan

**Current status: PROPOSED, NON-PUBLIC**

**This is a Proposed amended Project Plan, subject to Change Request drafted 21-Feb-2008**

Responsibility: PM dP

## JISC Project Plan

*Quick links:*

- **Deliverables** (with dP task links)
- **Dissemination Tasks** (with dP task links)

*Contents:*

## Overview of Project

### 1. Background

As the use of Federated Access Management (FAM) increases and matures within the education community, institutions will be able to start exploiting its potential for fine-grain authorisation and unified control of access authorisation and attribute release to third party services.

Software tools for these functions exist, but have not yet been widely deployed on production scales. More importantly (as found by studies such as that of the JISC Identity Project) there are relatively low levels of awareness amongst users (including academic staff, students, and IT-support staff) of some issues raised by the use of these tools.

### 2. Aims and Objectives

Project FLAME (Federated Local Access Management Environment) will build a production-scale institutional installation of the online shared services and user interfaces at LSE to enable, and then investigate, the use of three important functions peripheral to (but arguably essential to) the adoption of Federated Access Management (FAM) by an institution for cross-domain access to online resources. These are:

- **Delegated Authority Management (DAM):** the ability for users with appropriate authority to define, via a central shared service, the authorisations of other users to access diverse sources of information, online services, and physical spaces - including the power to delegate such powers in controlled ways to other users;
- **Attribute Release Policy (ARP):** the ability of the institution and each end user to effectively control what personal information about themselves is released to internal and external service providers; and
- **Virtual Organisation Management (VOM):** the ability for LSE users to easily provide 'guest' access to colleagues based at other institutions (ideally but not necessarily institutions participating in the UK Access Management Federation).

### 3. Overall Approach

Apart from project management activities (conducted following the JISC guidelines unless otherwise agreed with the JISC Programme Manager), the project will undertake parallel strands of **Technical implementation** and **Social study**, with timetables coordinated so that production-scale services are in place, in time for their promotion to users and gathering of information about their use.

#### Technical implementation

A technical team led by Simon McLeish will implement DAM and ARP tools, will design and build facilities for Virtual Organisation Management (enabling limited-term access to resources for people who are not 'identity managed' by LSE), and will integrate DAM controls with existing target applications. They will make extensive use of the findings of the JISC-funded Identity Project institutional audit of LSE, produced in October 2007, to establish requirements for authorisation management in particular.

#### Social study

In parallel a Social study team supervised and peer-reviewed by Edgar Whitley will undertake an LSE-wide user awareness information campaign, and then a survey of the attitudes of users to their use of non-public online resources, and release of attribute information about themselves, by methods including short 'intrusive' online surveys and more detailed interviewing, focus groups and questionnaires.

The scheduling of activities, primarily using the staff and student population of LSE as the research subjects, will take account of the annual academic timetable that most of them are following.

#### Critical success factors: Institutional

The main benefit to LSE of success of the FLAME Project (i.e. the business justification for the risks and costs of LSE participation in this JISC programme) will be the operational implementation of DAM, ARP and VOM services. These will build upon the enterprise directory and mature use of FAM technologies (Shibboleth) already established at LSE, and provide general-purpose foundations for better user identity management by LSE, and further exploitation of the potential of FAM to provide an improved online environment for learning and research.

#### Critical success factors: National

The main important deliverables (i.e. those that must 'succeed') from the point of view of national success of the project (i.e. the justification for JISC funding of this LSE-based activity) are:

- The findings of the **Social study**, about user attitudes to:
  - ◆ access management of non-public resources, to which they are granted access as a benefit of association with a research/HE institution;
  - ◆ identity management of personal data about themselves by a research/HE institution, including policies (institutional and personal) and usable tools for attribute release control;
  - ◆ requirements for virtual organisation management, across a research/HE institution that participates in many cross-institutional, international and cross-sectoral partnerships.
- The documentation produced by the **Technical implementation** of DAM, ARP and VOM tools, and their integration to an enterprise architecture appropriate for a research/HE institution. Although the aim of the project is merely to implement these tools for use at LSE (and evaluate the usefulness of the particular tools selected), dissemination activities of the project should ensure that this experience is documented transparently and publicly (as far as possible without compromising LSE security) and can be presented as guidance to other institutions (that have achieved a similar stage of maturity in use of FAM) wishing to emulate this 'institutional exemplar'.

## Relevant existing exemplars

Existing work which Project FLAME should note and track the progress of includes (*please add to this list*):

- The MACE-DIR programme of Internet2...
- The MAMS Project...
- The COmanage Project at...
- The Bristol University implementation of Grouper (GaryBrown is a Grouper author)
- ...

## 4. Project Outputs

### Deliverables

*Due dates in this list taken from outline workplan; to be refined by resource levelling in detailed task plan. All deliverables are reports (or described in a specific report) except: T3, T5, T7, T8, T10, S2, S5, S6, ...*

"NSS" = Not Scheduled to Start; "WIP" = Work In Progress;

*("dP" are links direct to this task in dotProject, for logging; it would be nice if I could open these in a new browser tab)*

Due date	Deliverable	Status	Date signed off
07-Dec-07	<b>M1:</b> Project Plan	OPERATIONAL	dP
07-Dec-07	<b>M2:</b> Project website	COMPLETED	dP
31-Dec-07	<b>T1:</b> Evaluation and selection of tools for DAM and ARP	COMPLETED	14-Jan-08 dP
31-Dec-07	<b>T2:</b> Specification and order for server hardware	COMPLETED	dP
31-Dec-07	<b>S1:</b> Plan for initial user awareness campaign	COMPLETED	dP
31-Dec-07	<b>M3:</b> Management Framework & Risk Register (agreed with ICT-MG)	COMPLETED	11-Feb-08 dP
31-Jan-08	<b>T3.1:</b> Installed DAM and ARP services	WIP	dP
31-Mar-08	<b>S2:</b> Launch of end user awareness campaign on AM and ARP issues	WIP	dP
31-Jan-08	Implement test target service; Implement test user accounts	WIP	dP
29-Feb-08	<b>T3.2:</b> DAM and ARP services integrated with ED	NSS	dP
29-Feb-08	<b>T3.3:</b> DAM and ARP services integrated with end user ARP interface	NSS	dP
29-Feb-08	<b>T4:</b> Selection of primary target applications for DAM	WIP	dP
14-Mar-08	<b>S3:</b> Identification of potential pilot VOM users?	NSS	dP
31-Mar-08	<b>T5.1:</b> Implement DAM on primary target application #1?	DELETED	[[[dP]]
31-Mar-08	<b>S4:</b> End user requirements for ad-hoc DAM and VOM?	NSS	dP
30-Apr-08	<b>T5.2:</b> Implement DAM on primary target application #2?	DELETED	[[[dP]]
30-Apr-08	<b>M4:</b> Interim report to JISC	NSS	dP
31-May-08	<b>T5.3:</b> Implement DAM on primary target application #3?	NSS	[[[dP]]
31-May-08	<b>T6:</b> Design for VOM process and user interface?	NSS	dP
31-May-08	<b>S5:</b> Plan for End User Attitude Study?	NSS	dP
30-Jun-08	<b>T5.4:</b> Implement DAM on primary target application #4?	NSS	[[[dP]]
31-Jul-08	<b>T7.1:</b> Implement VOM service (alpha)?	NSS	dP
30-Sep-08	<b>T7.2:</b> Implement VOM service (beta, for testing with pilot users)?	NSS	dP

31-Oct-08	<b>S6:</b> Re-launch of end user awareness campaign (after exam period and summer)?	NSS	dP
31-Oct-08	<b>M5:</b> Interim report to JISC?	NSS	dP
30-Nov-08	<b>T8.1:</b> Implement DAM on secondary target application #1?	NSS	[[[]dP]]
30-Nov-08	<b>T9:</b> Evaluation of effectiveness and risk of using DAM with any test versions of target applications?	NSS	dP
30-Nov-08	<b>S7:</b> End User Attitude Study issued?	NSS	dP
31-Dec-08	<b>T8.2:</b> Implement DAM on secondary target application #2?	NSS	[[[]dP]]
31-Jan-09	<b>T8.3:</b> Implement DAM on secondary target application #3 (within available time)?	NSS	[[[]dP]]
31-Jan-09	<b>T10:</b> Upgrade DAM-enabled test version applications to live services? where decided	NSS	dP
31-Jan-09	<b>S8:</b> Analysis and report on End User Attitude Study?	NSS	dP
28-Feb-09	<b>T11:</b> Handover plans for all services (for operational teams)?	NSS	dP
28-Feb-09	<b>M6:</b> Project recommendations to LSE?	NSS	dP
28-Feb-09	<b>T13:</b> Report on attribute recommendations to JISC and UK Federation?	NSS	dP
28-Feb-09	<b>M7:</b> Project evaluation?	NSS	dP
31-Mar-09	<b>T12:</b> DAM, ARP, VOM services handed over to operational teams?	NSS	dP
31-Mar-09	<b>S9:</b> Post-project user information materials on AM and ARP issues/policies at LSE?	NSS	dP
31-Mar-09	<b>M8:</b> Final report to JISC?	NSS	dP

## 5. Project Outcomes

The project will principally address the e-Infrastructure Security thematic area of the Call. However it will also contribute to the Community Engagement and Support theme with important findings about user engagement in (and methods to stimulate user understanding of and engagement in) access management processes. Project FLAME will deliver benefits to the community in the form of:

- Support for the development of institutional business cases for embedding FAM and supporting services into core institutional IT strategies and architectures;
- Clearly demonstrated sizing and costing for the production scale implementation and maintenance of these services, which can be used by other institutions considering their adoption and evaluating their own options for participation in the UK Access Management Federation;
- Important social research findings to measure how users as individuals are willing to participate in these processes;
- Evidence to inform the discussion amongst institutional IT service providers on appropriate ARP policies and practices, and required attributes and value vocabularies that should be supported or mandated by the UK Federation.

The use of FAM for fine-grain access authorisation is likely to expose gaps in current nationally and internationally agreed attribute schemata, such as the attributes and value-lists to describe specific roles of end users in an education institution. For example, the role of “library staff member” is required by several target applications and it would be useful to agree on this for cross-institutional use. Through working in close communication with the UK Access Management Federation; and the Information Environment Metadata Schema Registry, FLAME will develop a process for checking whether an appropriate attribute/value has already been registered (rather than reinventing it), and registering candidate standards produced by the project.

## 6. Stakeholder Analysis

Direct stakeholders in Project FLAME include all end users for whom LSE provides Identity & Access Management services, including 'non-members' of LSE for whom LSE could provide VOM services. User needs analysis for identity and access management is a significant undertaking in itself, and this proposal assumes that Project FLAME will take full advantage of the analysis currently being undertaken by the Identity Project at LSE.

Stakeholder	Interest / stake	Importance
LSE ICT 'providers'*	Improved management of online resources and user identity information. Cooperation essential to allow FLAME to use 'their' operational services.	High
LSE academic staff	Improved access and SSO to online resources; Learning about personal IdM? issues. Cooperation (of some) essential to conduct Social study.	Medium
LSE students	Improved access and SSO to online resources; Learning about personal IdM? issues. Cooperation (of some) essential to conduct Social study.	Medium
UK Access Management Federation	Learning about requirements for mature FAM.	Low
Signet/Grouper/COmanage developers	Testbed for their software. Collaboration with FLAME in requirements and support will make FLAME technical objectives easier to achieve.	Medium
ShARPE? developers	Testbed for their software. Collaboration with FLAME in requirements and support will make FLAME technical objectives easier to achieve.	Medium
Developers of 'target applications'	Testbed for AM integration of their software. Cooperation not necessary, but may be mutually useful.	Low

\* LSE ICT 'providers' are the staff involved in managing ICT services at LSE; all should be represented on the ICT Managers Group chaired by AdrianEllison.

## 7. Risk Analysis

**Note** that the table below represents the initial Risk Analysis at project (re-)planning stage. Don't edit it during the course of the project. Review and edit the **Risk Register** (*access FLAME Team and ICT-MG*) as part of each project report to ICT-MG.

<b>Risk</b>	<b>Probability (1-5)</b>	<b>Severity (1-5)</b>	<b>Score (P x S)</b>	<b>Action to Prevent/Manage Risk</b>	<b>Added/updated</b>	<b>Task page</b>
Staffing: Loss of senior project staff (PM, CTO, RE)	2	5	10	Be aware of the possibilities and ensure that alternative staff can be made available if needed; Provide preventative healthcare measures (e.g. flu vaccinations); Encourage work-life balance; Encourage (via JISC committees) programme management regime to be sympathetic to stress on project staff.	21-Feb-08	
Staffing: Loss of junior project staff	2	3	6	(As above); Ensure technical implementation and social study methodology is well-documented so that alternative staff can take over.	(start)	
External suppliers: One of the external software projects used by FLAME release timetable changes in a way that is incompatible with project timetable assumptions	2	3	6	Rely on stable releases (don't upgrade) where possible; Maintain close liaison with selected development projects so that we can be aware of and plan for possible changes early.	(start)	
Technical: Failure of hardware or supporting software	1	3	3	Use of operationally hosted/managed servers and replaceable virtual server hosting where possible.	(start)	
Legal: IPR	1	1	1	No IPR difficulties are anticipated as the project is collaborating with established open source development projects, with which LSE already has a relationship.	(start)	
Legal: Personal data	2	2	4	Ensure that user awareness campaign includes the key message that this is positive, preemptive action to improve LSE governance of personal	(start)	

				data.		
Organisational: Owners of target applications refuse risk of experimentation with their services	3	3	9	Identify an excess number of potential target applications, so that 'reserves' can be used if needed; Ensure that some target applications that will exercise full DAM/ARP/VOM functionality are under direct control of Library Projects Team; Maintain involvement of key service providers via ICT-MG governance of project.	(start)	
Organisational: Implemented services are not adopted for operational use	1	4	4	Maintain involvement of operational infrastructure managers via ICT-MG governance of project.	(start)	
Technical: Development/stability problems with Signet	3	3	9	maintain closer contact with developers and key pilot users (notably Michael J. Gettes at Duke); consider significant contribution by project staff (TO and CTO) to OSS development effort	18-Dec-07	TaskT1
Staffing: Delayed recruitment of Principal Researcher	0	2	0	(PR started in-post 05-Feb-2008)	11-Feb-08	RecruitPR
Staffing: Delayed recruitment of Technical Officer (beyond 01-May-08)	3	4	12	Closely monitor recruitment process; <b>Possible actions?</b>	21-Feb-08	RecruitTO
External suppliers: Significant collapse or timetable revision of JISC and UK Federation transition to FAM infrastructure	1	5	5	Active monitoring of all available information about the FAM-TP; PR from FLAME to support the wider FAM programme as appropriate.	30-Jan-08	

## 8. Standards

Name of standard or specification	Version	Notes
LDAP	v3	

SAML	v1.1, v2.0	
Shibboleth	v1.3, v2.0	
ISO 17799 (supercedes BS 7799)		see UCISA Information Security Toolkit Second Edition and IsoInfoSecurity
ShARPE		
Signet		
Grouper		
COmanage		

## 9. Technical Development

### Selection of candidate target applications

A number of key potential target applications have been identified that are likely to particularly benefit from the use of DAM. These are selected because:

- They are highly dependant upon user data originating in the current Active Directory, or intended for inclusion in the Enterprise Directory;
- They require 'fine grain' access discrimination to present appropriate online resources to the correct users;
- They are implemented using software which is Open Source, and/or for which the developers have already implemented some degree of integration with a Shibboleth/SAML-compliant FAM Service Provider.

Possible key target applications for FLAME include:

- The Moodle-based virtual learning environment. LSE operational plans are for the migration of courses and content from the current VLE platform (WebCT?) in two stages: approximately 300 postgraduate and language courses during AY 2007/8, and the remainder of courses in AY 2008/9;
- The LSE Research Online institutional repository, based on the Eprints.org platform. The StORe Project investigated requirements for linking datasets with institutional publication repositories, and a new project DISC-UK Datashare in which LSE is a partner aims to contribute to general development of the Eprints software to facilitate integration;
- An Online Reading Lists management system, currently being developed by the Library IT Support Team and intended to integrate closely with Moodle. The implementation timetable for this service aims to have an end user service in place by September 2008;
- The LSE Dataset Repository for researchers;
- Access restrictions to machines, electronic resources and space in the Department of Management who are moving to a New Academic Building in October 2008; (*Currently, we have lock down of machines in the ISIG space in Tower One*)
- Sample research projects that include academic and industrial partners and who will need access to shared resources (e.g. EnCoRe? project);

It is likely that further target applications will be identified, particularly by the institutional audit undertaken as part of the Identity Project. In general Project FLAME will avoid undertaking substantial programming within the code of target applications, and expect to be dependent upon these having been adapted for general use with FAM by other projects or developers.

The project team will attempt to liaise with the developers of all target applications (whether commercial or open source) involved in FLAME, to facilitate our own integration, to ensure that decisions we take about integration options are likely to be widely reusable, and to ensure that any development of open source

applications by the project team can be fed into future released versions of those products where possible.

## 10. Intellectual Property Rights

All published material produced by the project will follow current JISC (or JISC-endorsed) guidelines for accessibility or will adopt those used by the relevant software projects. Copyright of LSE and/or individual authors will be asserted but all material will be covered by the appropriate Creative Commons licence allowing free non-commercial re-use with attribution. Any software development contributions to the open source projects with which the project may collaborate will be released with the appropriate open source licence adopted by the relevant project.

## Project Resources

### 11. Project Partners

There are no external partners or subcontractors involved in the project.

### 12. Project Management

Project FLAME will be managed by John Paschoud who will be responsible for reporting to JISC and LSE internal stakeholders including the LSE ICT Managers Group.

The **Technical implementation** will be led by Simon McLeish, to whom the Technical Officer post will report. All other staff employed in the project will report to the Project Manager.

The **Social study** will be directed by Edgar Whitley (but with directly employed staff line-managed by the Project Manager).

All staff directly involved in the project will meet monthly, but this will be supported by extensive use of a wiki for recording of work in progress, and an online project management environment for logging time by task and task progress.

The LSE ICT Managers Group (chaired by Adrian Ellison) will act as an institutional steering committee for the project, and will receive a progress report at each of its meetings (normally monthly except in August) during the course of the project. Governance by the ICT-MG should be an important factor in ensuring local sustainability of the outcomes of FLAME at LSE, after JISC funding for the project ends.

Role	Name	fte	Telephone	Email
Project Manager ( <b>PM</b> )	John Paschoud	0.5	020 7955 6129	j.paschoud@lse.ac.uk
Chief Technical Officer ( <b>CTO</b> )	Simon McLeish	0.5/1.0*	020 7955 6450	s.mcleish@lse.ac.uk
Research Evaluator ( <b>RE</b> )	Edgar Whitley	(inst contrib)	020 7955 7410	E.A.Whitley@lse.ac.uk
Project & Communications Officer ( <b>PCO</b> )	Greg Pytel	1.0	020 7852 3550	G.Pytel@lse.ac.uk
Technical Officer ( <b>TO</b> )	(recruitment in progress; start not now likely before 01-Apr-08)	1.0		
Principal Researcher ( <b>PR</b> )	Isidora Kourti	0.5	020 7852 3509	I.Kourti@lse.ac.uk

The Project Manager will plan to spend 0.25fte (approx. 496h) on project management (including line-management) tasks, and the remainder of time funded by the project budget on dissemination and technical design and/or quality control tasks.

The TO will not be in-post until 01-Apr-2008 or later. The CTO will work 0.5fte on the project from 01-Nov-2007 until 31-Jul-2008, and then will work fulltime on the project from 01-Aug-2008 until 28-Feb-2009.

The posts of Technical Officer and Principal Researcher are new recruitments to LSE. It is possible that training will be required by either or both postholders in the relevant technologies (at different levels of detail) and/or concepts involved in federated access management. It is likely that any training required can be provided by other members of the project team informally, or by utilising UK HE community events which other members of the project team are already involved in or aware, such as the JISC Access management transition programme.

### 13. Programme Support

No project-specific areas of required support from JISC have been identified at present.

### 14. Budget

Changes to the budget as originally proposed are shown at ProjBudgetAmended21Feb. These reflect re-allocation of salary costs for the TO post (Nov-2007 to Mar-2008) to the additional 0.5fte of the CTO post (Aug-2008 to Feb-2009).

## Detailed Project Planning

### 15. Workpackages

#### Outline workplan

*This will be further detailed in dotProject to produce and update Appendix B of this Plan.*

Project-month	Technical strand	Social strand	Management activity
1 - 2 (Nov-Dec 2007)	<b>T1:</b> Evaluate and select tools for DAM and ARP; <b>T2:</b> Specify and order server hardware;	<b>S1:</b> Plan awareness campaign;	<b>M1:</b> Project Plan; <b>M2:</b> Project website; <b>M3:</b> Management Framework & Risk Plan agreed with ICT-MG;
3 - 4 (Jan-Feb 2008)	<b>T3:</b> Install DAM and ARP services; Integrate with ED; Integrate with end user ARP interface; (Implement test target service; Implement test user accounts); <b>T4:</b> Select target applications for DAM;	<b>S2:</b> Launch end user awareness campaign on AM and ARP issues; <b>S3:</b> Identify potential pilot VOM users;	(Reporting to ICT-MG; External dissemination activities)
5 - 8 (Mar-Jun 2008)	<b>T5:</b> Implement DAM on primary target applications (test versions where risk to services is high); <b>T6:</b> Design VOM process & user interface;	<b>S4:</b> Document end user requirements for ad-hoc DAM and VOM; <b>S5:</b> Plan End User Attitude Study;	<b>M4:</b> Interim report to JISC; (Reporting to ICT-MG; External dissemination activities)
9 - 12 (Jul-Oct 2008)	<b>T7:</b> Implement VOM service; Test with pilot users; ( <b>T8:</b> Implement DAM for secondary target	<b>S6:</b> Re-launch end user awareness campaign after exam period and	(Reporting to ICT-MG; External dissemination activities)

	applications within available time;)	summer;	
13 - 14 (Nov-Dec 2008)	<b>T9:</b> Evaluate effectiveness and risk of using DAM with any test versions of target applications; Plan transfer to live application services where appropriate;	<b>S7:</b> Undertake End User Attitude Study;	<b>M5:</b> Interim report to JISC; (Reporting to ICT-MG; External dissemination activities)
15 - 16 (Jan-Feb 2009)	<b>T10:</b> Upgrade DAM-enabled test version applications to live services where decided; <b>T11:</b> Prepare handover plans for operational teams;	<b>S8:</b> Analyse & report on End User Attitude Study;	<b>M6:</b> Project recommendations to LSE;
17 (Mar 2009)	<b>T12:</b> Deliver handover of operational DAM, ARP, VOM services; <b>T13:</b> Report on attribute recommendations to JISC and UK Federation;	<b>S9:</b> Design & produce post-project user information materials on AM and ARP issues/policies at LSE;	<b>M7:</b> Project evaluation; <b>M8:</b> Final report to JISC;

### Workplan and timetable considerations

The project will start in November 2007 (rather than October) because it will depend heavily on the institutional audit conducted by The Identity Project to establish organisational and functional requirements, for DAM and VOM in particular. The Identity Project is scheduled to report and complete in October 2007, and will also be engaging the time of key staff for Project FLAME until then. The planned work can be completed in 17 months, by March 2009.

Project FLAME will select and implement appropriate tools for ARP and DAM at an early stage (months 1-3), including integration with the Enterprise Directory, so that the remaining time/resources of the technical strand of the project could be devoted to tackling issues of integration with target applications. A detailed workplan for this will be produced as part of the Project Plan, in months 1-2, including evaluation to determine exactly which target applications can reasonably be included.

Later work in the technical strand will include refining/customising end user interfaces to the tools, and developing a VOM service to meet the needs of LSE staff and students to authorise access for colleagues from outside of LSE (the VOM service itself will be subject to well-controlled DAM).

Technical work will need to be coordinated with other planned development and maintenance work by various IT provider services, staff and/or contractors, so that opportunities provided by other necessary breaks in service (hardware/software upgrades etc) can be used to minimise end-user disruption and risks to operational services; and so that non-project staff can spare time to be consulted on project requirements or technical details of applications for which they are responsible.

The Social strand of the project will begin activities apparent to end users in month 4 with a campus-wide awareness campaign, using existing Web-based channels of communication with LSE end users, 'traditional' newsletter channels for informing the LSE community, and also less traditional methods such as articles placed in 'The Beaver' (print and online editions), items on the campus radio and TV networks, and an external press campaign (aiming to generate 'out-in' awareness within LSE, and also inform the wider academic community) aimed at publications such as THES and Guardian Education.

It will be important to coordinate Social strand activities with the wider academic year timetable, to maximise chances for engaging significant numbers of LSE staff and student end-users.

## 16. Evaluation Plan

Evaluation of the impact of the project will be undertaken as the second part of the Social strand, as a detailed study to find out how users engage with, value (or object to) access management processes and tools. The End

User Attitude Study will gather information using a variety of techniques including short intrusive ('pop-up') online surveys, detailed questionnaires and individual and focus group interviews. It will make use of experience gained in the Identity Project of gathering similar information from end users.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
by Feb-08	Functional DAM, ARP on ED	Are basic DAM and ARP services functioning on ED and fit for pilot use?	Review and testing by ICT-MG	
by Jun-08	Successful use with primary target applications	Are DAM and ARP working correctly with all primary target applications?	Testing by ICT-MG	
by May-08	End User Attitude Study design	Is the study and designed methodology covering key information to be collected?	Review by RE	
by Jan-09	End User Attitude Study findings	Are analysis and conclusions soundly linked to evidence gathered?	Review by RE (and external peer)	
by Feb-09	Operational use of DAM, ARP, VOM services	Are services implemented by FLAME fit for operational adoption?	Review and testing by ICT-MG	

## 17. Quality Plan

Output: **T1**: Evaluation and selection of tools for DAM and ARP

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Dec-07	Recommended DAM and ARP tools viable	Review by ICT-MG	Current functional descriptions appear to meet interoperability requirements for LSE ED	CTO	

Output: **S1**: Plan for initial user awareness campaign

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Dec-07	Campaign will reach key target audiences; will include all key messages	(tbd)	Review by RE	PCO	

Output: **T3**: Functioning DAM and ARP services

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Feb-08		Testing by ICT-MG	Attempted access to test target	(tbd)	

\_ICT-MG members, or independent staff under their direction, will be used as alpha-testers of basic service functionality.

Output: **T4**: Selection of primary target applications for DAM

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Feb-08		ICT-MG		CTO	

Output: **S4**: End user requirements for ad-hoc DAM and VOM

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Mar-08		Review by RE		PR/PM	

Output: **T6**: Design for VOM process & user interface

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
May-08		Review by RE		CTO/PM	

Output: **S5**: Plan for End User Attitude Study

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
May-08		Review by RE		PR	

Output: **T5**: Functional DAM on primary target applications

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Jun-08		Testing by ICT-MG		CTO	

Output: **T7**: Functional VOM service

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Sep-08		Testing by ICT-MG		CTO	

Output: **T9**: Evaluation of effectiveness and risk of using DAM with any test versions of target applications

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Nov-08		Review by ICT-MG		CTO	

Output: **S8**: Analysis & report on End User Attitude Study

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)

					applicable)
Jan-09		(RE; External peer)		PR	

Output: **T11**: Handover plans for all services

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Feb-09	Usable by operational staff?	Review by ICT-MG	(tbd)	CTO	

Output: **T13**: Report on attribute recommendations to JISC and UK Federation

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Feb-09		(External - UK Fed staff?)		CTO	

Output: \*\*

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)

## 18. Dissemination Plan

dP

Communication with LSE end users (and other LSE stakeholders) to promote awareness of access management issues, including DAM and ARP, and to measure end user participation in and attitudes to these processes is inherent in the Social strand of the project, and is dealt with in the detailed workplan for those activities.

The Dissemination Task Plan therefore tracks only planned **external** dissemination activities. External communication about Project FLAME with the wider F&HE community will use a variety of channels including a project website, a public JISCmail list, regular bulletins to other appropriate UK and international email lists (such as those devoted to developers and implementers of the FAM, DAM and ARP tools used by the project, as well as lists for developers and implementers of target applications to be addressed by the project such as Moodle and Eprints), press releases aimed at the education sections of the national press, and presentations at appropriate conferences during the course of the project.

Most planned dissemination activities will be continuous throughout the lifetime of the project (and some may continue after the end-date of the project, if relevant staff are available and their time can be validly funded for these activities). Dissemination themes and messages at different times will be determined by progress in the Technical and Social strands (e.g. when integration of a particular target application with externalised DAM has been achieved, it will be appropriate to announce this to any developers or users email list for that application).

## 19. Exit and Sustainability Plans

Documentary findings of the project will be published on a project website and covered by an appropriate free re-use licence. In common with previous JISC-funded projects completed by LSE, this will be maintained at a stable URL for at least 3 years after the completion of the project, and all materials will be available for further archiving beyond that period, in compliance with JISC Standard Conditions.

Any code modifications to open source target applications made in the course of the project will be deposited with the relevant open source development project and made available for free re-use under an appropriate licence.

The working services implemented by the project will be handed over to appropriate LSE operational service teams as a planned activity within the technical strand, following the handover model established by the PERSEUS project for the Identity Provider service at LSE. This process will be overseen by the LSE ICT Managers Group, on which all relevant operational services are represented.

Project Outputs	Action for Take-up & Embedding	Action for Exit
Published reports (S7, T13)	Promotion via external dissemination activities	Archiving on LSE-LPT public Dspace host
LSE operational handover reports (T9, T11, M6, S8)	Promotion via internal LSE channels	Archiving on LSE-LPT Dspace host, and/or project wiki
Operational DAM, ARP and VOM services	Operational handover actions (T11, T12, M6)	Takeover by operational staff teams
Evidence of all project 'workings', whether public or LSE-only	Leave on Projects/FLAME wikiweb	Check access to all pages; Preserve Projects/FLAME web for agreed minimum period
Software contributions to any target applications	Deposit to relevant OSS project development tree if possible; Maintain contact with project lists	Project FLAME completion messages to OSS project lists

A principal object of the project is that DAM, ARP and VOM services implemented become operational parts of the LSE information services architecture.

Documentary outputs of the project (including all identified deliverables) will all be preserved online. All will be publicly readable, except those including information that may compromise security architecture elements, which will be appropriately redacted or excluded from public access.

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address

## Appendixes

## **Appendix A. Project Budget (amended 21-Feb-2008)**

## **Appendix B. Workpackages**

- Set ALLOWTOPICVIEW = LseIctManagersGroup, LseLibraryOfficeGroup, FlameProjectTeamGroup
- Set ALLOWTOPICCHANGE = JohnPaschoud

-- JohnPaschoud - 21 Feb 2008