



### Project Plan Cover Sheet

Project Information			
<b>Project Acronym</b>	LIFE-SHARE		
<b>Project Title</b>	LIFECycle Strategies and Architecture for Regional E-content		
<b>Start Date</b>	1 <sup>st</sup> September 2009	<b>End Date</b>	28 <sup>th</sup> February 2011
<b>Lead Institution</b>	University of Leeds		
<b>Project Director</b>	Bo Middleton		
<b>Project Manager &amp; contact details</b>	1/9/09-30/11/09	Beccy Shipman ( <a href="mailto:b.shipman@leeds.ac.uk">b.shipman@leeds.ac.uk</a> )	
	1/12/09-28/2/11	0113 34 31769	
<b>Partner Institutions</b>	University of York, University of Sheffield, JISC Digital Media		
<b>Project Web URL</b>	<a href="http://www.leeds.ac.uk/library/projects/lifeshare/">http://www.leeds.ac.uk/library/projects/lifeshare/</a>		
<b>Programme Name (and number)</b>	e-Content Capital Programme 02/09		
<b>Programme Manager</b>	Alastair Dunning		

Document Name			
<b>Document Title</b>	Project Plan		
<b>Reporting Period</b>	Initial plan		
<b>Author(s) &amp; project role</b>	Bo Middleton, Project Director/acting Project Manager; Julie Allinson, York lead and acting Project Manager		
<b>Date</b>	7/1/10	<b>Filename</b>	See URL and version history JISC_FullProjectPlan_v1.2.pdf
<b>URL</b>	<a href="http://www.leeds.ac.uk/library/projects/lifeshare/docs/JISC_FullProjectPlan_v1.2nb.pdf">http://www.leeds.ac.uk/library/projects/lifeshare/docs/JISC_FullProjectPlan_v1.2nb.pdf</a>		
<b>Access</b>	■ Project and JISC internal		

Document History		
Version	Date	Comments
1.0	5/10/09	Submitted to JISC
1.0nb	5/10/09	Version 1.0 with budget details removed – made available on project website
1.2	7/1/10	Updated work-packages to reflect discussions with JISC Programme Manager, updated budget – submitted to JISC
1.2nb	7/1/10	Version 1.2 with budget details removed – made available on project website



## JISC Project Plan

### 1. Background

**Overview.** The JISC e-Content Grant Funding Opportunity 02/09 called for proposals focussing on “Institutional Skills and Strategies”. The LIFE-SHARE Project will address this strand – undertaking institutional case studies to exemplify consortial strategies for digitisation, whilst considering the entire lifecycle of digital content. The project will enable each of the partner libraries to undertake a small amount of digitisation work – with the primary aim of identifying, and firmly establishing, institutional and consortial strategies and infrastructure for the creation, curation and preservation of digital content.

**Project benefits/rationale.** Digitisation is a complex procedure, or rather a complex network of parallel procedures. The work of the LIFE-SHARE Project will be based on all aspects of the digital content lifecycle. The Project will adopt one of the current lifecycle models for digital content<sup>1</sup> and use this to analyse current practices within institutions and across the consortium. Each of the partner libraries is engaged in digital content creation, for a variety of purposes, and there is a growing need to understand costs and benefits across the digital content lifecycle. The adoption of a lifecycle model will ensure that the LIFE-SHARE Project identifies costs and institutional/consortial strategies for all aspects of digital content curation and preservation. It is envisaged that LIFE-SHARE project work will further inform the work of the LIFE Project<sup>2</sup> – by creating additional sets of lifecycle costing data.

Across the digital content lifecycle, required skills range from project management to the preparation of exacting technical specifications, and from assessing the needs of users to constructing media-specific metadata profiles. To add to this complexity, different skills are drawn upon within different contexts – digitisation of printed material within the day-to-day activities of an academic library is likely to be a very different to a special-funded and time-limited digitisation project. The status, nature and condition of materials may also call for highly bespoke digitisation skills. The 2007 JISC Digitisation Conference at Cardiff<sup>3</sup> emphasised the need to describe the nature of these interdisciplinary skills along with current training provision. The LIFE-SHARE Project will directly address this need by working with project partner, JISC Digital Media, to assess the skills required for the creation, curation and preservation of digital content and match these requirements with current training provision available to the UK’s academic community.

Last year’s Ithaka report, ‘Sustainability and Revenue Models for Online Academic Resources’<sup>4</sup> identified compelling reasons to collaborate on digital content creation, curation and management – both within and across institutions. The LIFE-SHARE Project, being a consortial proposal, is well-placed to explore both institutional and consortial strategies to support digitisation activities, and the wealth of expertise across the partner institutions will ensure that the project outcomes will capitalise on the pooling of experiences – for the benefit of the wider community. LIFE-SHARE work-package

---

<sup>1</sup> LIFE model <http://eprints.ucl.ac.uk/4831/>, DCC model <http://www.dcc.ac.uk/docs/publications/DCCLifecycle.pdf>  
<sup>2</sup> <http://www.life.ac.uk/>

<sup>3</sup> [http://www.jisc.ac.uk/media/documents/publications/digi\\_conference\\_report-v1-final.pdf](http://www.jisc.ac.uk/media/documents/publications/digi_conference_report-v1-final.pdf)

<sup>4</sup> [http://sca.jiscinvolve.org/files/2008/06/sca\\_ithaka\\_sustainability\\_report-final.pdf](http://sca.jiscinvolve.org/files/2008/06/sca_ithaka_sustainability_report-final.pdf)

deliverables have been designed to benefit the wider community as well as project partners. As an example, work-package 2 will create an invaluable resource for departments and projects that wish to perform an in-house skills audit before embarking on digitisation.

One of the real strengths of the LIFE-SHARE Project is that it draws together a wide array of professional skills from across the consortium. Mirroring the growing need for interoperability in our digital delivery of services, and the recognition that silos of unconnected content are difficult to manage and access, by bringing together distributed staff and skills this project will help create a shared understanding and a shared pool of expertise which can only help enhance the consortium and its ability to deliver appropriate and viable services and to contribute to national initiatives.

## **2. Aims and Objectives**

The primary aim of the LIFE-SHARE project is to identify, and firmly establish, institutional and consortial strategies and infrastructure for the creation, curation and preservation of digital content.

Objectives:

- Map the skills and knowledge required at each stage of the digital content lifecycle. Map the current skills/knowledge training available and identify gaps in training provision.
- Develop skills and knowledge across the partner libraries to support institutional and consortial digitisation activities.
- Establish mechanisms to support on-going collaboration across the partner libraries – to foster knowledge exchange, and share experiences or good practice in all aspects of digital content creation, creation and management.
- Identify current approaches to digitisation and develop appropriate strategies for institutional and consortial digital collections across the entire digital content lifecycle. Develop resources to support future institutional and consortial digitisation activities.
- Develop case study material exemplifying strategies and best practices for a variety of digital content – content created ‘on-demand’, research data, preservation collections and digital versions of special collections or archives.
- Develop an understanding of the lifecycle costs and benefits of digital collections – and how they vary for different types (or purpose) of collections, plus how they vary across institutions.
- Investigate options for providing a service for image digitisation across the consortium.
- Explore opportunities for extending the current collection management collaboration to digital content.
- Consider institutional, consortial and national infrastructure scenarios for preservation of digital collections.

## **3. Overall Approach**

The LIFE-SHARE Project will be delivered via a series of inter-related work-packages (WP), which will be tightly defined and which will provide a framework for project management and evaluation.

The University of Leeds Library currently uses a standard project management methodology for all project work (an adaptation of PRINCE 2 methodology). LIFE-SHARE project management will therefore conform to recognised good practice in the field and will be managed in accordance with JISC project management protocols.

The project is working across three institutions, with three defined case studies for each. One issue is that the project must ensure that the consortial dimensions of the project remain central to the project whilst individual case studies deliver local benefits. Strong central management, an engaged advisory group and wide dissemination will be needed to ensure cross-fertilisation of outputs. Another issue is that in looking at digitisation to meet local, immediate needs, it would be easy to lose sight of the importance of considering the whole lifecycle, from acquisition to preservation and disposal – adopting an established lifecycle model, or models, will help.

The project is not undertaking large-scale digitisation and will not deliver fully embeddable services. Scoping, investigating and establishing business models are in scope.

Critical success factors:

- That the project delivers the range of outputs outlined in the project plan.
- That these outputs have real benefits for the local, consortial and wider community.
- That we build shared expertise that will be valuable beyond the timescale of the project.
- That the outcome of the project is to give a clear way forward for building digitisation strategies for the long term.

## **4. Project Outputs**

### **Key project deliverables**

- A skills, knowledge and training map to identify the skills, knowledge and training required at each stage (and across) the lifecycle of digital content.
- Case studies exemplifying institutional strategies for digitisation. Specifically: strategies for digitisation to support collection management; strategies for digitisation to support Special Collections; and strategies to support on-demand digitisation.
- Case studies or models exemplifying collaborative and consortial strategies for digitisation. Specifically: strategies to support research data; modelling a consortial service for digital image creation; strategies to support consortial collection management; and modelling a consortial infrastructure for institutional and/or consortial collections.
- Lifecycle toolkit and best practice guidelines. Drawing on an initial audit, on the subsequent institutional case studies, and on the consortial models, the toolkit will bring together checklists, decision trees and lessons learned to create a resource pack for institutions undertaking digitisation activities.

### **Intangible knowledge/experience**

- Increased understanding of local and consortial digitisation requirements.
- Knowledge of digitisation approaches.
- Better understanding of skills required across the whole digitisation lifecycle.
- Up-skilled individuals.

## 5. Project Outcomes

- Better planning for digitisation services, which understand the lifecycle costs and implications, and are embedded into teaching, learning and research.
- Improved processes to meet the needs of individuals, institutions, consortia and the wider community.
- Business models to ensure cost-effective, sustainable future services.

## 6. Stakeholder Analysis

The Project Advisory Group will allow the project staff to consult directly with representatives from each partner and, most importantly with a range of personnel with differing expertise. This mixture of librarians, archivists, record managers and technical staff is a key feature of the LIFE-SHARE Project – allowing for a wide-ranging input into project work. Outreach and advocacy will be planned as part of the project’s Communication and Dissemination plans – a key stakeholder being the wider community which should benefit from project findings.

Stakeholder (within consortium/project)	Interest / stake	Importance
Senior management (at institutional and service level)	Creating/maintaining efficient processes and services; linking services to institutional and library strategy	High
Academic researchers and research students	As producers and consumers of content – improved creation/management and increased access to content	High
Teaching academics and undergraduates	As producers and consumers of content – improved creation/management and increased access to content	High
Project Team and Advisory Group	Responsible for the project and for ensuring that it delivers benefits to the local institution, and consortial partners	High
Library, and learning technology	Building systems and services to support users	Medium
IT staff	Supporting the technical infrastructure to deliver services	Medium
Administrators	Responsible for other related University systems	Medium
Stakeholder (external)	Interest / stake	Importance
HE community in the UK	Sharing experience, developing services, skills and strategies	Medium
JISC E-Content Programme	Sharing project experience	High
External service providers	Availability of additional content sources and services	Medium
External projects and organisations involved in the digitisation lifecycle	Sharing experience, developing services, skills and strategies	Low

## 7. Risk Analysis

Risk	Probability	Severity	Score	Action to Prevent/Manage Risk
------	-------------	----------	-------	-------------------------------

	(1-5)	(1-5)	(P x S)	
Project staff are not recruited in time for the start of the project	2	5	10	<ul style="list-style-type: none"> <li>Develop job descriptions and advertise as soon as possible upon hearing that the funding bid has been successful.</li> <li>Project Director and staff at Leeds and York will co-ordinate/ undertake the initial project work.</li> <li>1st work-package will be largely undertaken by an external partner.</li> </ul>
Existing staff & advisory group unable to give sufficient time to project due to other work commitments	3	3	9	<ul style="list-style-type: none"> <li>Effective planning (first work-package out-sourced and established Advisory Board members).</li> <li>Rapid recruitment of project staff.</li> </ul>
Staff members leave during the course of the project	3	3	9	<ul style="list-style-type: none"> <li>Team members will have 3 month notice period so some overlap of contracts may be possible.</li> <li>Each partner will have current/core staff involved in the project – allowing for some continuity of knowledge – in order to minimise disruption.</li> <li>Document project activity incrementally – to ensure smooth handover to new staff.</li> </ul>
Key stakeholders and/or project partners do not support the project	2	3	6	<ul style="list-style-type: none"> <li>Agree Project Advisory Group at an early stage – ensuring all key stakeholders are represented. Identify senior representative for the project at each partner institution – to be members of the Advisory Group.</li> <li>Ensure regular information flow to all partners/stakeholders, and seek feedback on direction and progress at every opportunity.</li> <li>Develop a communication plan for the project.</li> </ul>
Project partners do not deliver on time	3	3	9	<ul style="list-style-type: none"> <li>Clear agreements and timescales from the project outset.</li> <li>Effective project management and communication.</li> </ul>
Timescales slip due to unforeseen issues	3	2	6	<ul style="list-style-type: none"> <li>Agile approach to changing goals.</li> </ul>

## 8. Standards

Any element of the project which is considering storing or exchanging digital content across the consortium or beyond will consider standards. These are likely to include some/all of the following: OAI-PMH, qualified Dublin Core, METS, MODS, MARC21, XML and accessibility standards.

Best practice guidance, such as that provided by JISC Digital Media, the Digital Curation Centre and the Digital Preservation Coalition will be used in devising approaches to delivering elements of the lifecycle.

## 9. Technical Development

The project is non-technical, and is not delivering technical outputs or undertaking technical development.

## 10. Intellectual Property Rights

Wherever possible, all digitisation work undertaken as part of the LIFE-SHARE Project will result in digital content which will be permanently and freely available.

Where practical, collections selected for digitisation will be free of copyright, data protection or other legal issues. In other cases, a clear rationale will be given for selecting restricted or licensed content. A key part of the consortial case study LIFE-SHARE will be to maximise the discoverability of the digitised collections – across the consortium – and hopefully nationally.

We will consider the use of Creative Commons for releasing content.

The project will be managed according to JISC guidelines for the management and handling of intellectual property. Outputs will be made available free of charge to the UK HE and FE community in perpetuity, and will be available for wide dissemination in partnership with JISC.

## 11. Project Partners

- University of Leeds, lead partner, 1.0 Project Manager + 1.0 Project Officer – lead on majority of project work including Leeds and Sheffield case studies.  
Contact: Bo Middleton, Project Director, [m.m.middleton@leeds.ac.uk](mailto:m.m.middleton@leeds.ac.uk), 0113 343 6386.
- University of York, partner, 0.5 Project Officer – lead on York case study.  
Contact: Julie Allinson, [ja546@york.ac.uk](mailto:ja546@york.ac.uk)
- University of Sheffield, partner.  
Contact: Jacky Hodgson, [J.D.Hodgson@sheffield.ac.uk](mailto:J.D.Hodgson@sheffield.ac.uk)
- JISC Digital Media, partner, sub-contractor – lead on work-package 2.  
Contact: Dave Kilbey, [D.Kilbey@bristol.ac.uk](mailto:D.Kilbey@bristol.ac.uk)

## 12. Project Management

**Methodology.** The University of Leeds currently uses a standard project management methodology for all project work (an adaptation of PRINCE 2 methodology). LIFE-SHARE project management will therefore conform to recognised good practice in the field and will be managed in accordance with JISC project management protocols.

**Project staffing.** A Project Manager (1 FTE, 15 months) will be appointed as soon as possible. This post will be based at the University of Leeds and will co-ordinate all Project activity. He/she will manage the Project on a day-to-day basis and have responsibility for budgeting, administration, communication, dissemination, deliverables, and time schedule. The Project Manager will maintain relationships with the partners and will monitor and review progress. The Project Manager will also maintain the Project website. Quality assurance will be the responsibility of the Project Manager, who will ensure that requirements/deliverables for each work-package are identified, monitored and reviewed.

Project Officers (3x0.5FTE, 15 months) will be appointed as soon as possible. These posts will be shared across the White Rose partner libraries and will lead the work on work-packages 4 and 5. They will also provide input on project management and evaluation/dissemination activities.

Staffing for the first 3 months of the project will vary slightly – to ensure that project work can commence immediately. For these first 3 months, project management will be undertaken by current staff at Leeds and York, and work-package 2 (months 1-4) will be led/ largely undertaken by project partner JISC Digital Media. It is envisaged that project posts will be filled from project month 3 or 4 onwards. Other staff who will work on the LIFE-SHARE Project are already in place and our partners have indicated that they are able to offer staff resource as per the schedule proposed.

**Project governance.** The Project Director, Bo Middleton will oversee the work of the LIFE-SHARE Project, chair the Advisory Group meetings, and act as an advocate for the project to the external community.

A Project Advisory Group will be established to oversee the general strategy of the LIFE-SHARE Project and provide a steer on key issues. It will meet 3 times a year to review key developments and sign-off key documentation. The group will also have both a quality assurance and an evaluation remit – it will monitor how the LIFE-SHARE Project is progressing and whether/to what extent it is meeting its key objectives.

Members of the group will also play a key role in a number of work-packages – acting as consultants to the project at appropriate points. Membership of the group has therefore been carefully selected to inform project work. Membership will include the Project Director, Project Manager and a senior representative from each of the partner universities. External members will include a British Library/LIFE 2 advisor, the archivist for the Timescapes Programme, a key player in the Digital Preservation community and a JISC Digital Media advisor.

Local project groups will be established at each partner institution to oversee local work-package/case study activity. These will be chaired by the senior representative for the project at each institution, and will include staff involved with various aspects of the project locally. Whilst active (i.e. during the appropriate points in the project lifetime) the project management groups will provide a regular progress report to the Project Manager. All staff involved with the project will be encouraged to meet twice a year through the organisation of partners meetings where ideas, issues and key milestones can be discussed and shared.

**Training.** It is envisaged that there will be no training needs for project staff. Part of the project work will identify specific training need across the digitisation lifecycle, for current staff.

### 13. Programme Support

No areas have been identified at present. As the project progresses, we may want to consult the Programme in order to find others using similar approaches or facing similar issues.

## **14. Budget**

The detail of the initial project budget is provided in Appendix A. No changes to the budget in the original project proposal.

## **15. Workpackages**

The detail of the proposed project work-packages is provided in Appendix B.

## 16. Evaluation Plan

Project evaluation is the subject of work-package 7. Formative evaluation will consist of ongoing analysis of the project, and formal consultation with users. A final report will be produced at the end of the project.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Three monthly	Project planning and management	Is the project continuing according to the project plan?	Progress reports assessed by Advisory Group.	Project is progressing according to plan; risks have been minimised with necessary adjustments.
Ongoing	External Communication	Is the project web site and/or blog up-to-date? Does it provide sufficient information to communicate what the project is doing? Have outputs been shared wherever possible.	Regular review by project team; feedback invited from external users; access statistics.	Web site is being visited and negative feedback has been minimal; information on the site is up to date.
Ongoing	Communications, meetings and collaboration	Are project team communications effective? Is the project communicating effectively with the Advisory Group and other stakeholders?	Ongoing review of meeting efficacy and attendance and by speaking to members individually.	Meetings are attended and useful. Members of team and groups are kept up to date.
Monthly	Project work	Is project work progressing to plan? Are there roadblocks?	Project Team meetings; regular review of progress and outputs.	Work is progressing and goals are being met.
Ongoing	Dissemination activities and wider engagement	Are stakeholders aware of the project? Are other relevant communities aware?	Review feedback and dissemination activities.	Project is well known at the 3 Universities and beyond.
Feb '11	Final report	Does the final report accurately reflect project achievements?	Peer review by Advisory Group and JISC Programme Manager.	Project illustrates its success through the final report.
End of project	Summative assessment	How effectively has the project met its objectives and contributed to those of the JISC programme? Can lessons be learnt?	Review by the Project Manager, liaising with the Advisory Group.	Lessons are fed to relevant people.

## 17. Quality Plan

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities
<b>Output</b>	<b>A skills, knowledge and training map to identify the skills, knowledge and training required at each stage (and across) the lifecycle of digital content.</b>			
Feb '10	Fitness for purpose; Content	Peer Review	Documents are of a high standard and meet identified needs.	Advisory Group
<b>Output</b>	<b>A week-long series of training/dissemination events.</b>			
Jan '11	Content	Internal Review; External Feedback	Training events are well organised, with high quality content	Advisory Group; Project Manager
Jan – Mar '11	Impact and Learning Outcomes	Feedback	Positive feedback from training events.	Project Manager
<b>Output</b>	<b>Case studies exemplifying institutional strategies for digitisation. Specifically: strategies to support collection management; strategies to support Special Collections; strategies to support on-demand digitisation.</b>			
Oct '10	Content	Internal Review	Progress review	Project Manager
Jan '10	Content	Peer Review	Case studies and strategies are appropriate, well considered. Case studies are well written, researched and comprehensive.	Advisory Group.
<b>Output</b>	<b>Case studies or models exemplifying collaborative and consortial strategies for digitisation. Specifically: strategies to support research data; modelling a consortial service for digital image creation; strategies to support consortial collection management; and modelling a consortial infrastructure for institutional and/or consortial collections.</b>			
Nov – Dec '10	Content; Fitness for Purpose	Peer Review	The model is appropriate and offers a sustainable way forward for the consortium	Advisory Group
<b>Output</b>	<b>Lifecycle toolkit and best practice guidelines. Drawing on the institutional and consortial case studies, the toolkit will bring together checklists, decision trees and lessons learned to create a resource pack for institutions undertaking digitisation activities.</b>			
Jan '11	Content	Peer Review; Testing	Quality and appropriateness of the material	Advisory Group

## 18. Dissemination Plan

A key element of the LIFE-SHARE Project will be the sharing of outcomes with the wider community. Dissemination will be co-ordinated by the Project Manager but will be carried out by all main participants in the project. Key dissemination activities will include dissemination events as part of the training programme in work-package 6.

Timing	Dissemination Activity	Audience	Purpose	Key Message
Ongoing	Web site	External	Information	Project progress
Ongoing	Blog/Wiki	External/ internal	News and updates, community engagement	Project progress and commentary from the community
Ongoing	Conference and event attendance	External/ internal	Knowledge sharing	Sharing information on project outputs
Annually	Articles	External	Promotion and knowledge sharing	Sharing information and experience on project outputs and methodology
Ongoing	Mailing lists	External	Seeking advice, promotion and knowledge sharing	Sharing information and experience on project outputs
6-monthly internals	Programme Meetings	External	Promotion and knowledge sharing	Sharing information and experience on project outputs
Project months 17/18	Training/dissemination week	External/ internal	Knowledge sharing	Sharing information and experience on project outputs and methodology

## 19. Exit and Sustainability Plans

Project Outputs	Action for Take-up & Embedding	Action for Exit
A skills, knowledge and training map to identify the skills, knowledge and training required at each stage (and across) the lifecycle of digital content.	Ensure wide dissemination and consultation with a wide range of consortium staff.	Documentation to be maintained on project web pages.
A week-long series of training/dissemination events – open to the wider community.	Ensure wide consultation on programme; work with wider community on devising content; wide advertising of events to appropriate audience	Training materials to be maintained on project web pages and made available to training organisations to re-use.
Case studies exemplifying institutional strategies for digitisation. Specifically: strategies for digitisation to support collection management; strategies for digitisation to support Special Collections; and strategies to support on-demand digitisation.	Working with the Advisory Group to ensure outcomes are embedded into local practice. Wide dissemination beyond the consortium.	Case studies to remain available on project web pages.
Case studies or models exemplifying	Working with the Advisory Group to	Models to remain available

collaborative and consortial strategies for digitisation. Specifically: strategies to support research data; modelling a consortial service for digital image creation; strategies to support consortial collection management; and modelling a consortial infrastructure for institutional and/or consortial collections.	ensure outcomes are embedded into local practice. Wide dissemination beyond the consortium.	on project web pages. Establishment of a consortial infrastructure. Models to be embedded into local practice.
Lifecycle toolkit and best practice guidelines. Drawing on the institutional and consortial case studies, the toolkit will bring together checklists, decision trees and lessons learned to create a resource pack for institutions undertaking digitisation activities.	Ensure that the toolkit is widely disseminated. Ensure that it is fully tested with the target community.	Toolkit maintained on the project web pages. Ongoing support to update and ensure it is used in local practice.

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
Consortial model	The model is intended for use in real-life practice, which will inevitable change.	Embed ownership into core work of one of the project partners.	Effort required to keep it current.
Training	Training materials will be reusable.	Place ownership into the hand of the trainers, or other training bodies, depending on who is selected to deliver training.	Need for future revision.
Toolkit	The toolkit is intended for use in real-life practice, which will inevitable change.	Embed ownership into core work of one of the project partners.	Need for revision and review.

## ***Appendixes***

**Appendix A. Project Budget - see separate file LIFE-SHARE\_JISCInitialBudget\_v1.2.xlsx**

**Appendix B. Workpackages – appended in PDF file or see separate file LIFE-SHARE\_JISCWorkpackages\_v1.2.docx**



## JISC WORK PACKAGES

WORKPACKAGES	Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1: Project management	1-18	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
2: Skills/knowledge/training map for the digital content lifecycle	1-2, 6-8	█	█				█	█	█										
3: Institutional case studies	6-11						█	█	█	█	█								
4: Consortial models	10-15										█	█	█	█	█	█			
5: Strategy toolkit	5-6, 14-16					█	█								█	█	█		
6: Training programme	16-18																█	█	█
7: Evaluation and dissemination	18																	█	█

Project start date: 2009-09-01

Project completion date: 2011-02-28

Duration: 18 months

Workpackage and activity	Earliest start	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
<b>WORKPACKAGE 1:</b>					
<b><i>Objective:</i></b> To provide project management for the project.					
1. Produce Project Plan (including evaluation, QA and dissemination plans), Work-packages plan, Budget	1/9/09	30/9/09	Project plan, Work-packages plan, Budget.	Deliver initial plans to JISC. Sign-off by Advisory Group (AG).	BM, JA
2. Create Project website, blog/wiki	1/9/09	31/01/10	Project website, blog/wiki.	Project website, blog/wiki in place.	BM, PM, POs
3. Produce and sign consortium agreement	1/9/09	30/11/09	Consortium agreement.	Signed agreement forwarded to JISC.	BM
4. Recruit project personnel	1/9/09	30/12/09		Project Manager and Project Officers in post.	BM, JA
5. Develop & maintain issues log for project	1/9/09	28/2/11	Issues log.		PM
6. Monitor activities against original project plan	1/11/09	28/2/11	Regular highlight reports to project partners and project director, report to Library Management Team.	Sign-off by AG	PM, Advisory Group
7. Produce progress reports	1/2/10	30/9/10	Progress reports.	Sign-off by JISC.	PM
8. Produce final report	1/1/11	28/2/11	Final report.	Sign-off by JISC.	PM
<b>WORKPACKAGE 2:</b>					
<b><i>Objective:</i></b> To create a skills/knowledge/training map covering the digital content lifecycle – for each of the institutional case studies (from WP3).					
9. Investigate requirements for skills map	1/9/09	31/10/09		Initial findings presented to AG.	DK

Workpackage and activity	Earliest start	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
10. Investigate requirements for training map	1/9/09	31/10/09		Initial findings presented to AG.	DK
11. Produce skills/knowledge/training map	1/2/10	30/4/10	<b>Skills/knowledge/training map</b> document/ diagrams.	Sign-off by AG.	DK
<b>WORKPACKAGE 3:</b>					
<b>Objective:</b> This work-package will involve the creation of 3 case studies exemplifying institutional strategies. Each case study will consider previous experiences and current practices across the consortium, look for synergies, identify further alternatives, and compile checklists/best practice guidelines to inform the case study.					
12. Use first stage of (WP5) to look for synergies in current practices across the WR institutions. Define approach and scope for each case study. Map workflow for each case study	1/1/10	28/2/10	Defined scope for each case study. Defined workflow for each case study.	Defined approach/scope signed off by AG.	PM, POs
13. Undertake digitisation and preservation activities for each case study	1/2/10	31/5/10	<b>Digitised content.</b> Digitised content available through local/consortial repository.	Completion of digitisation, completion of ingestion.	PM, POs
14. Cost whole lifecycle for each case study	1/2/10	31/5/10	Lifecycle costs established for each case study.	Findings presented to AG.	PM
15. Document each case study including cost-benefit analysis	1/5/10	30/6/10	<b>Institutional case studies.</b>	Sign-off by AG.	PM, POs
<b>WORKPACKAGE 4:</b>					
<b>Objective:</b> This work-package will draw together the consortial elements of the work-package 3 case studies in order to present a summary of findings relating to the collaborative aspects of the work undertaken.					
16. Investigate feasibility (including costs) of	1/6/10	31/8/10		Initial findings presented	POs

Workpackage and activity	Earliest start	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
providing a consortial digitisation service				to AG.	
17. Undertake and document cost-benefit analysis for consortial digitisation service	1/9/10	30/11/10	<b>Model for consortial digitisation service.</b>	Sign-off by AG.	PM
18. Investigate options for a consortial infrastructure to support access to, and preservation of, digital content	1/6/10	31/9/10		Initial findings presented to AG.	POs
19. Model how digitisation might support long-term collection management within and across the partner institutions	1/6/10	31/9/10		Initial findings presented to AG.	PM
20. Document consortial models (for objectives 21 & 22)	1/10/10	30/11/10	<b>Models for consortial infrastructure &amp; consortial collection management.</b>	Sign-off by AG.	PM, POs
<b>WORKPACKAGE 5:</b>					
<b>Objective:</b> To create a digitisation strategy 'toolkit' (gather information and skills together in a single, re-usable resource, intended to inform at both a strategic and service delivery level).					
21. Examine current infrastructure (hardware/software), strategies/policies and (service) provision in place in each of the WR universities for each stage of the digitisation lifecycle. Identify current and potential digital collections at each of the WR universities	1/1/10	31/1/10		Initial findings presented to AG.	POs
22. Gather knowledge and collate resources for current digitisation work at each of WR institutions	1/2/10	28/2/10	Interim toolkit compiled (checklists, list of expertise (use skills map), list of previously used providers and	Findings presented to AG.	PM, POs

Workpackage and activity	Earliest start	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
			outcomes, collate infrastructure/ metadata options).		
23. Same as objective 25 – but after case study work/consortial model work	1/10/10	30/10/10		Initial findings presented to AG.	POs
24. Collate into 'toolkit' including creating dissemination copies of the various aspects of the toolkit	1/11/10	31/12/10	<b>Toolkit.</b>	Sign-off by AG.	PM, POs
<b>WORKPACKAGE 6:</b>					
<b>Objectives:</b> To undertake a skills audit across the White Rose consortium universities using the skills/training map produced in WP2. To evaluate the WP2 skills/training maps. To plan and run series of training and dissemination events.					
25. Define ongoing communication and dissemination for the project	1/1/10	31/1/10	Refined communication plan – detailing series of 'internal' dissemination events – informing WR universities about the project/project progress.	Dissemination events at each WR university delivered – as defined by communication plan.	PM, POs
26. Undertake skills audit, identify skills gaps across consortium	1/11/10	30/11/10		Initial findings presented to AG.	POs
27. Evaluation of skills/training maps	1/12/10	31/1/11		Findings presented to AG.	PM
28. Design training and dissemination programme	1/12/10	31/12/10	Programme of events (to address skills gaps for WR partners; to address training provision gaps; to address lifecycle training; to disseminate lessons learned from	Sign-off by AG.	POs

Workpackage and activity	Earliest start	Latest completion	Outputs (clearly indicate deliverables & reports in bold)	Milestone	Responsibility
			LIFE-SHARE Project work).		
29. Plan and create resources for training and dissemination events	1/1/11	31/1/11		Resources prepared.	POs
30. Deliver training and dissemination events	1/2/11	28/2/11	<b>Training/dissemination events.</b>	Training delivered.	PM,POs
<b>WORKPACKAGE 7:</b>					
<b>Objective:</b> To evaluate the project outcomes and make recommendations for future development					
31. Undertake summative evaluation activities	1/1/11	28/2/11	Evaluation report.	Sign-off by AG.	PM
32. Produce completion report	1/2/11	28/2/11	Completion report.	Sign-off by AG, sign-off by JISC	PM
33. Produce exit strategy and follow-on actions log	1/2/11	28/2/11	Exit strategy and follow-on actions log.	Sign-off by AG, sign-off by JISC	PM

Members of Project Team:

BM = Bo Middleton, University of Leeds  
 JA = Julie Allinson, University of Leeds  
 DK = Dave Kilbey, JISC Digital Media  
 PM, Project Manager = Beccy Shipman, University of Leeds  
 POs, Project Officers = Ned Potter, University of Leeds; Matthew Herring, University of York