JISC Project Plan - EVIE

Overview of Project

1. Background

Researchers in all disciplines are increasingly expecting to be able to undertake a variety of research-associated tasks online. These range from collaborative activities with colleagues around the globe through to information-seeking activities in an electronic library environment. Many of the tools which enable these activities to take place are already available within the local IT infrastructure. However, in many cases, the tools are provided through discrete, bespoke interfaces with few links between them. Researchers face a number of challenges in this environment, including multiple methods of authentication and authorisation, finding information and sharing information between applications. The EVIE Project will address these issues by testing the integration and deployment of key existing software components within a portal framework.

2. Aims and Objectives

The main objectives of the EVIE Project are to:
- Establish a prototype VRE infrastructure based on open standards and existing software components to support a test group of researchers; including users from the School of Medicine, School of Geography, and researchers using the White Rose Grid.
- Provide a set of additional resources and services through this environment, including facilities for enhanced search and retrieval.
- Deliver simplified-sign-on functionality to enable seamless integration between the identified platforms.
- Provide a set of user validated recommendations identifying effective, scaleable and reusable mechanisms for construction of intuitive search and retrieval tools within this environment.
- Provision of enhanced resource discovery mechanisms with document visualisation techniques available to indicate relevance.
- Develop best practice for the use of a taxonomy within a VRE.
- Provide support for search and retrieval mechanisms across disparate information resources within a VRE.
- Identify long-term options and requirements for digital preservation in a VRE.
- Identify requirements for data integration to provide a seamless flow of information between systems integrated through the environment.

3. Overall Approach

The University of Leeds has developed and deployed a Virtual Research Environment, known as the Virtual Knowledge Park (VKP). The VKP supports 11 large-scale research programmes which include national research centres, regional research networks, technology institutes and European research consortia within which there are over 200 active research networks. We have also developed separate systems for our VLE known as the Bodington system and for our e-library resources. The Bodington system has been distributed as open source software and is now used by other UK HEIs including Oxford, Manchester and the University of the Highlands and Islands. We have thus already gained substantial experience of how a VRE can support the research process, and in dissemination of lessons and outcomes from projects with other institutions. The EVIE Project will build on this expertise by integrating our VRE, VLE, e-library and other selected corporate resources. This integration will deliver a range of benefits to researchers, including widening awareness of the tools available, increasing familiarity, uptake and use of tools, aiding ease of use, and improving the ability for researchers to share information across disparate systems.   By taking this approach we believe that we can add significant value to the research process by improving the efficiency and effectiveness with which these tools can be utilised.

A portal is intended to provide a seamless, web-based interface to a range of university systems and services. The key benefit of a portal framework is to bring together disparate resources and systems into a single environment, so that end-users can utilise these tools in an integrated fashion, thus aiding efficiency and effectiveness, and improving the overall user experience. The portal framework

for EVIE will integrate Bodington and VKP and other tools and services deployed in the project. It will be based around open standards, and this will enable us to deliver portlets and channels within an extensible framework. The portal will provide a customised and personalisable framework for the VRE. Customisation will enable us to deliver content to users based on their roles – for example, researchers would see content pushed to them based on their discipline; this might be most effectively utilised in the delivery of e-library resources to researchers through the VRE. Personalisation will enable users to tailor content to their own specific needs. One aim of provision of VRE services through the portal is to simplify authentication and authorisation. A VRE needs to inter-operate with central authentication and authorisation mechanisms across the campus in order to reduce the number of passwords which users have to remember, to enable improved trust relation-ships to be developed between systems and to reduce system administration overheads of maintaining multiple accounts and passwords on multiple systems. Routes to simplified-sign-on will differ according to the systems being integrated, and the need for security of data.

Experience of similar initiatives has identified that critical to the success of such activities is the need to provide search and retrieval mechanisms which work across the underlying information systems which support the services delivered. The EVIE project therefore also aims to explore tools for taxonomy development, which can be implemented to support information management within the portal and resource discovery visualisation to support information-seeking activities. The project will review long-term preservation requirements in a VRE context including retention of collaborative outputs and persistent identifiers for resources used in citations. EVIE will concentrate on the delivery of a prototype service to support a pilot group of users. The pilot area will be drawn from researchers working within the White Rose Grid at the University of Leeds, as well as researchers from the School of Geography and the School of Medicine. We will also work with the Research Support Unit at the University of Leeds to gather wider requirements for research needs.

4. Project Outputs

Key project outputs will include:

- A user requirements analysis report with recommendations for service development and key integration of the key tools and services.
- A system integration route map, including technical and functional specification, and visual design criteria.
- A working demonstrator system.
- A report on digital preservation requirements for VRE systems.
- An implemented JSR168 Portlet that provides access to SRU/SRW services from the British Library, and others.
- A visual front-end to the resource discovery services provided in the VRE, showing visually the relative importance of sources and the correlations between them.
- A report summarizing the applicability of FAST classification for classifying content.
- A framework for a taxonomy for use within EVIE.
- The functional integration of key systems utilising simplified-sign-on mechanisms.
- A report on capabilities for 'back-end' integration of systems to provide greater integration at the data level.
- A final project report, including exit strategy.
- An evaluation and dissemination strategy.
- A dissemination event (or series of events).
- A set of guidelines for best practice.
- A set of end-user documentation and training activities.
- A set of recommendations for the transferability of the system to other institutions

5. Project Outcomes

Key project outcomes will include:

- The successful integration of existing and additional tools and services within a seamless environment.
- An improved understanding of user requirements for VREs.

- A scoping study detailing potential for system integration, and level of integration required (eg: channel or portlet development).
- The implementation of simplified-sign-on functionality across the environment.
- An improved understanding of digital preservation requirements for resources generated through a VRE, and an outline of capabilities required for undertaking preservation.
- A taxonomy framework which is suitable for utilisation in a VRE.
- An evaluation report of lessons learned, problems overcome, issues identified for further development, and of eventual user benefits.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
Vice Chancellor and Senior Administration staff	Strategy	High
Academic and research staff	Users	High
Research students	Users	Medium
Administrators – including Research Support Unit	Policy	High
Information Systems Services staff	Strategy, Policy, Technical	High
Library staff	Technical, Policy	Low
Bodington.org consortium	Technical	Medium
Virtual Learning Environment staff	Technical, Policy	Medium
VKP (and PMG as subcontractors)	Technical, Policy	Medium
Internal and external VKP users	Users	Low
Software vendors – Library management system	Technical	Medium
Other institutions	Strategy, Policy, Technical	Low
JISC	Strategy, Policy, Technical	Medium

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Staffing is not recruited in time for start of the project	5	4	20	Develop job descriptions and advertise as soon as possible. Project Director can co-ordinate initial project set-up work until Project Manager appointed.
Staff members leave during the course of the project	3	5	15	Team members will have 3 month notice period so some overlap of contracts may be possible. Ensure that other key staff are closely involved in project, so disruption is minimal. Ensure project well documented so new staff could take over if required. Develop project knowledge-base using VKP tools.
Key stakeholders do not buy in to/support the project	3	3	9	Agree project steering group at an early stage and ensure all key stakeholders represented. Ensure regular information flow to all stakeholders, and seek feedback on direction and progress at every opportunity. Develop a communication strategy for the project. Find a senior champion for the project.

Expectations from stakeholders are higher than we can deliver.	3	2	6	Ensure regular information flow, develop communication strategy. Prioritise findings of user needs analysis and make reasons for prioritisation clear. Feed back to users on priorities. Set clear boundaries on project scope.
Portal software not available within our timescales	3	5	15	Ensure current portal tender moves forward within timescale required. Review work-packages so that preliminary work can take place if portal tools not ready within early phases of project.
Lack of clear institutional strategy for technical integration options	3	4	12	Escalate to key technical stakeholders and seek high-level decisions on technical direction.
Lack of clear institutional strategy for standards compliance	3	4	12	Escalate to key technical stakeholders and seek high-level decisions on standards compliance.
Subcontractors not able to meet our timescales	3	4	12	Seek agreement on timescales, quality expectations and deliverables with sub-contractors at earliest opportunity.
A review of University virtual environments is currently taking place, which may impact on the future for some of the key services that we intend to integrate as part of the project	2	5	10	Ensure that we have input into the review and that the review team are aware of the project.

8. Standards

The project will work with JISC-identified standards in the JISC Information Environment, wherever possible.

The project will develop tools utilising the institutional portal framework. Institutional Portal frameworks sit within the JISC IE Technical Architecture at the presentation layer. Portal channels will be developed utilising the recognised open standards developing in this area.

The Portal system will support multiple email standards and protocols. The system will support established infrastructure standards and communication protocols, which are likely to include some or all of the following: JMS, XML, IMS, HTTP/HTTPS, LDAP, IMAP, POP, SMTP.

The Portal API will be able to pass information to other applications in order to seamlessly integrate multiple sources of information.

WAI – the framework will aim to comply with WAI accessibility guidelines at the A or AA level.

Middleware standards – we will aim to utilise the recommended middleware standards for authentication and authorisation. These include LDAP and Shibboleth, use of Active Directory and Kerberos.

Distributed search and retrieval protocols – we aim to utilise some or all of the following: Z39.50 version 3, SRW/SRU version 1.1 and OAI PMH. SRW service components will return data in simple Dublin Core record format defined by the SRW DC XML schema. Context-sensitive linking will be handled via the OpenURL protocol.

Security and data protection – servers will be managed to the JISC security standards, including regular and timely application of security patches. Any personal data stored on the system or transferred between systems will be encrypted according to SSO encryption. Data protection legislation will be upheld. Secure connections will be handled using standard methods such as SSL.

Open standards – we will endeavour to utilise the appropriate open standards, or where it is not possible to utilise these we will work with the de facto industry standards.

9. Technical Development

The project will adopt the waterfall software lifecycle model, modifying it where appropriate to include aspects of rapid prototyping. Where possible there will be constant review of the development process by the project working group, users from our test-base, and peers within the institutional IT infrastructure.

An overview of the development approach is as follows:

- User requirements gathering
- Planning and design
- Development and implementation
- Testing and review

Each phase will interact with the other phases, and visual mock-ups and usability check points will be used to ensure transparent and effective delivery. Maintaining open communication channels during the development will ensure that a usable solution is realised.

Technologies used in the prototype development are likely to include Java, XML, JSP, and J2EE technologies, enabling easy standards-based integration with authentication and security applications, simplified-sign-on, secure access and end-user customisation.

10. Intellectual Property Rights

The sub-contractor for development work on the Virtual Knowledge Park is PMG – the Program Management Group PLC. See http://www.pm-group.co.uk/ for further information about PMG. PMG's default terms and conditions are that PMG owns the IPR of any development work it carries out UNLESS specific, written agreement is made to the contrary. In the case of the EVIE project, PMG will be providing any development work required to allow the VKP system to be integrated into portal systems. This activity will encompass changes to the VKP source code to enable integration with portal frameworks. The VKP source code is not one of the EVIE project outputs. The project officer will develop channels to integrate all of the systems included in the EVIE project. All of these channels developed will be a project output and as such will be available to the community free of charge. Any channels to the VKP will not be part of the VKP source code.

Project Resources

11. Project Partners

Partner	Role	Main Contact	Consortium agreement signed?
British Library	To lead the user requirements analysis, to lead the VRE preservation requirements analysis, to lead resource discovery activities, to lead on taxonomy design and development activities	Dr Adam Farquhar, Head of Information Systems Architecture.	
Virtual Knowledge Park	To undertake development work on VKP system, as a sub-contractor (PMG are the sub-contractor).	Professor Christine Leigh, Emeritus Professor on Virtual Working Systems	

Bodington.org consortium	To undertake development work on Bodington system, as a sub-contractor	David Gardner, Senior Assistant Registrar, Learning Development Unit	
White Rose Grid	To provide a user test bed for the project, to lead work on document visualisation	Dr Steve Chidlow, ISS Service Manager (Systems)	
Leeds University Library	To co-ordinate all project activity, act as lead partner and provide overall direction for the project	Brian Clifford, Deputy Librarian, University Library	
Information Systems Services	To provide infrastructure framework and ensure that products are developed in line with institutional requirements and institutional information architecture	Colin Coghill, Head of Information Systems Services.	
Virtual Learning Environment Service	To provide input into technical direction of project in relation to capabilities and strategic direction for VLE.	Paul Wheatley, VLES Team Leader.	

12. Project Management

Project Steering Group

The Project Steering Group will provide formal sign-off to the key project documents and outcomes. It will act as a high-level champion for the project within the University of Leeds, and will ensure that the project deliverables are broadly in line with institutional strategy. The Project Steering Group membership is identified as follows:

- Brian Clifford, Deputy University Librarian (chair)
- Tracey Stanley, Head of e-Strategy and Development, Library (Project Director)
- Dr. Derek Sergeant, EVIE Project Manager
- Kathy Brownridge, Deputy Director of the Research Support Unit.
- Dr. Mark Priestley, Pro-Dean for Research, Faculty of Education, Social Sciences and Law.
- Professor Andrew Bell, Pro-Dean for Research, Engineering Faculty.
- Bo Middleton, Academic Services Portal Project Manager
- Professor Christine Leigh, Emeritus Professor of Virtual Working Environments.
- Gill Harrison, Research Support Unit
- Mark Bulmer, Head of Information Systems, Information Systems Services
- Omar Benaddi, Research Systems Service Group Leader, Information Systems Services.
- Representative from the British Library.

Project Working Group:

The Project Working Group is intended to oversee the work of the EVIE Project on a day-to-day basis. The Working Group should include representatives of key stakeholders, including:

- Brian Clifford, University Library (Chair)
- Dr. Derek Sergeant, EVIE Project Manager
- Peter Balmforth, EVIE Project Officer
- Bo Middleton, Academic Services Portal Project Manager.
- Dr. Craig Adams, VKP.
- David Gardner, Learning Development Unit (for Bodington.org).
- Paul Wheatley, Virtual Learning Environment Service.
- Dr. Adam Farquhar, British Library
- Stephen Andrews, British Library
- Tracey Stanley, University Library
- Nigel Bruce, ISS Infrastructure
- Dr. Steve Chidlow, White Rose Grid.

EVIE Project Team:

The Project Team is intended to co-ordinate and deliver the work packages.

- Tracey Stanley, Head of e-Strategy and Development, Library (Project Director)
- Dr. Derek Sergeant, EVIE Project Manager
- Project Officer (to be appointed)
- Dr. Adam Farquhar, British Library
- Stephen Andrews, British Library

The Project will follow the JISC project management guidelines alongside the University of Leeds Academic Services guidelines for project management, and will formally report to the Library Management Team on a monthly basis. It will also provide reports for information to the ISS Programme Review Meetings. A reporting link to the VKP Steering Group will also be established. The project will also report to the University Research Systems Steering Group, and through this to the University Research Board. Where training needs arise these will be met by using courses offered by the University of Leeds SDDU or arranged through the University of Leeds Academic Services staff development and training.

13. Programme Support

JISC Programme support assistance would be appreciated for dissemination activities. Training on quality assurance methods would also be appreciated.

14. Budget

Attached in Appendix A.

Detailed Project Planning

15. Workpackages

Attached in Appendix B.

16. Evaluation Plan

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Months 1 – 24.	Achievement of objectives against timescales	Did the project achieve it's objectives within the timeframes of the project plan?	- Project plan. - Interim reports to JISC. - Project issues log. - Project lessons learned log. - Project reports. - Final report.	- Project Plan approved by Steering Group and JISC. - Interim reports approved by Steering Group and JISC. - All issues on issues log closed by end of project, or included in a follow-on actions log. - Project reports approved by Steering Group and JISC. - Final report approved by Steering Group and JISC.

Months 1 – 6.	User response	Does the service meet with user expectations	• Focus group to gather user requirements. • User requirements document. • Interviews with stakeholders to gather requirements.	• Set of user and stakeholder requirements. • Technical and functional specification which identifies how user requirements will be met in the system.
Months 7 – 8.	Performance of system against expectations	Does the system perform in line with technical expectations?	• Standards mapping document. • Prototype system.	• Approval of standards document and authentication strategy by Steering Group. • Approval of prototype system by Steering Group.
Month 8.	User response	Does the service meet with user expectations	• Circulation of technical and functional spec to Steering Group	• Approval of technical and functional specification by Steering Group.
Months 10 – 11.	Performance of system against expectations	Does the system perform in line with technical expectations?	• Authentication and authorisation strategy document.	• Approval of document by Steering Group
Months 12 – 16.	User response	Does the service meet with user expectations	• Iterative usability testing.	• Usability testing demonstrates improvement in user responses to system over the testing period.
Months 12 – 16.	Performance of system against expectations	Does the system perform in line with technical expectations?	• Usability testing. • System testing and bug fixing reports.	• Usability testing demonstrates improvement in user responses to system over the testing period.
Months 22 – 24.	User response	Does the service meet with user expectations	• User satisfaction survey. • Interviews with stakeholders at end of project. • Usage logs.	• Over 60% satisfaction rating on user satisfaction survey. • Endorsement of final system by stakeholders. • Usage logs show at least 100 logins in first month of live service.

Months 22 – 24.	Performance of system against expectations	Does the system perform in line with technical expectations?	• User satisfaction survey. • Interviews with technical stakeholders at end of project	• Progression plan in place for fixing identified bugs. • Over 60% satisfaction rating with technical performance on user satisfaction survey. • Endorsement of final system by stakeholders.
Months 22 – 24	Impact of outcomes	What impact has the project had on the institution? What impact has the system had on users?	• Exit strategy and follow-on actions log. • Lessons learned log. • Issues log. • User satisfaction survey. • Guidelines for best practice. • Dissemination events.	• Exit strategy and follow-on actions log approved by Steering Group. • Lessons learned log provides feedback on impact. • Issues log provides feedback on ongoing issues throughout the project. • Dissemination events attended by at least 50 members of academic and research staff. • Guidelines for best practice approved by Steering Group.

17. Quality Assurance Plan

Output	All workpackage outputs				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
End of each work package	Best practice for processes	• Regular highlight reports fed to key stakeholders • End stage reports produced at the end of each workpackage	Evidence in the end stage reports. The quality review process is linked to the end stage reports	DS	
Output	All workpackage outputs				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
End of each work package	Adherence to specifications	• Technical and functional specification • Production of regular highlight reports • End stage reports	Final product meets technical and functional specification. Evidence in the end stage reports.	DS	
Output	All workpackage outputs				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
End of each work package	Adherence to standards	• Utilisation of open standards self-audit documentation on QA website	High score on standards audit	DS	
Output	User requirements analysis				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 5 – 6	Fitness for purpose	• Focus groups • User feedback	Sign off analysis report and set of proposals	DS, AF, SA	
Output	Systems integration requirements				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 7 – 8	Validity	• Review • User feedback	Positive user feedback, sign off by working group	DS, Project Officer	
Months 7 – 8	Usability	• Demonstrator • Stakeholder review	Acceptance of visual design criteria, scope for enhancement agreed	DS, Project Officer	
Output	VRE preservation requirements analysis				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 12 – 14	Applicability	• Publication	Paper published and positive feedback received from the community	AF, SA	

Output	Resource discovery and document visualisation				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 13 – 17	Applicability	• Publication	Paper accepted for publication	DS, KB	
Months 8 – 10	Test plan	• Portlet test	Sign off test plan, portlet meets technical and functional specification.	Project Officer, SA	
Months 14 – 17	Test plan	• System test • User test	Sign off test plan	DS, Project Officer	
Output	Taxonomy design and development				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 10 – 12	Fitness for purpose	• Regular highlight reports to key stakeholders	Evidence in the minutes and the documents	AF	
Output	Simplified-sign-on and channel development and implementation				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 13 – 16	Design specification	• System test	Sign off test plan, bugs are fixed or progression plan put in place for their resolution	Project Officer, Working Group	
Output	Development and deployment				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 19 – 22	Test plan	• Usability test • System test	Signed off test plan, development log book updated	DS, Working Group	
Months 15 – 23	Accessibility legislation	• Audit product	Compliance with WAI, ensuring alternatives are planned where compliance is not possible	DS	W3C accessibility checking software
Output	Evaluation and dissemination				
Timing	**Quality Criteria**	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities**	**Quality Tools**
Months 22 – 24	Appropriate project documentation	• Review	Sign off exit strategy, final project report, agree follow-on actions log	DS, Steering group	

List of initials in Quality Responsibilities:

DS – Derek Sergeant

AF – Adam Farquhar

SA – Stephen Andrews

KB – Ken Brodlie

18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
Ongoing	Attend JISC Programme Meetings	JISC Programme members	Share project aims, outcomes, issues that arise during the project, contribute to programme as a whole	Learning from others and contributing to overall programme process.
Month 1	Local announcement(s) about the project on institutional intranet and institutional newsletter, and through identified channels for the British Library.	Internal audiences	General awareness of the project	Overview of nature of project, general aims of project, invite contact for further information.
Month 1	Papers describing the project to be presented at Research Systems Steering Group, Research Board, Information Systems Steering Group and VKP Steering Group and at identified fora at the British Library.	Internal audiences of key stakeholders	Raise awareness of the project, seek high level buy-in	Overview of nature of project, strategic fit, general aims.
Months 1 – 5	Undertake focus groups and initial interviews with stakeholders	White Rose staff (for focus groups), key stakeholders	Raise awareness of project, seek input into user requirements. Get stakeholders involved and on-board at early opportunity	Overview of nature of project and general aims. Their input sought into developing the objectives of the project and shaping outcomes.
Months 1 – 3 and ongoing	Develop document repository for project members on the VKP site, to include an online discussion forum	Key project stakeholders, project working group	Maintain awareness of project, promote active communication of project working group to contribute to development of successful working relationships	Tools for effective communication between project members, and sharing outcomes from different workpackages.
Months 1 – 3 and ongoing	Develop project website.	Internal audience, external audience	Raise awareness of project, Keep audience informed of progress on an ongoing basis, provide a repository for work in progress and completed.	Overview of nature of project, general aims of project, invite contact for further information.
Months 6 – 7	Interview users and key stakeholders about digital preservation requirements	White rose staff, key stakeholders	Maintain awareness of project and provide opportunity to input requirements	Opportunity to input their requirements on preservation.
Months 7 -8	Test demonstrator system with users and key stakeholders	White rose staff, key stakeholders	Maintain awareness of project and opportunity to input into project direction.	Opportunity to give us feedback on an early demonstrator and to suggest options for further development.

Months 12 – 14	Produce papers for publication and/or conferences on taxonomy work and digital preservation work.	External audience	Raise external awareness of the project and some of the emerging outcomes, widen profile of the project with the wider community, seek to disseminate outcomes at earliest possible opportunity	A review of innovative aspects of the project.
Months 12 – 14	Update about project and key outcomes so far on institutional intranets and institutional newsletters, and through other channels identified for the British Library.	Internal audiences	Maintain awareness of project and engage stakeholders by announcing progress	Update on progress towards meeting project objectives.
Months 14 – 20	Usability testing with users and key stakeholders	White rose staff, key stakeholders	Maintain awareness of project and provide opportunity to input into project direction	Opportunity to give us feedback at various stages of system development.
Months 17 – 20	Produce paper for publication and/or conferences on document visualisation work.	External audience	Raise external awareness of the project and some of the emerging outcomes, widen profile of the project with the wider community, seek to disseminate outcomes at earliest possible opportunity	A review of innovative aspects of the project.
Months 20 – 24	Undertake dissemination events and other activities at Leeds and at British Library – to include demonstrations, newsletter articles, email circulation etc	Internal audiences	Raise internal awareness of the project, demonstrate outcomes, encourage take-up of services, seek input into exit strategy and further developments	Opportunity to review outcomes of the project, hear about project successes and how the work might be taken forward.
Months 20 – 24	Undertake national dissemination events – to include workshops, conferences, newsletter articles, email circulation etc.	External audience	Raise external awareness, demonstrate outcomes.	Opportunity to review outcomes, share learning experiences, discuss best practice.
Months 20 – 24	Produce papers for publication and/or conferences on entire project	External audience	Raise external awareness, demonstrate outcomes	Opportunity to review outcomes, share learning experiences, discuss best practice.

19. Exit/Sustainability Plan

Project Outputs	Action for Take-up & Embedding	Action for Exit
Project reports, final reports, system and user documentation	Disseminate more widely through publication of aspects from the reports. Develop best practice guidelines from reports, summarise and present to key stakeholders and committees at Leeds and at British Library. Use to develop follow-on actions log for further development beyond the end of the project.	Retain on project website for at least 3 years beyond end of project.
System	Encourage take-up and use through dissemination events and presentation to key stakeholders, continue to evaluate user satisfaction.	Identify funding requirements for further development and seek strategic funding for these through internal funding mechanisms.

Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
System	Will become an element of the University staff portal, and will continue to be developed under this strategic driver.	Further funding available through internal funding mechanisms to extend system to develop as full staff portal.	Funding will need to be identified well in advance of end of EVIE Project. Long-term staffing issues to be addressed. Long-term steering issues to be addressed

Appendixes

Appendix A. Workpackages

Separate document available.

The EVIE Project will submit the following deliverables from the workpackages to JISC as part of the regular reporting process:

- Workpackage 2. The agreed user requirements analysis report
- Workpackage 4. The preservation requirements publication
- Workpackage 5. Publication on document visualisation
- Workpackage 6. Paper on taxonomy
- Workpackage 9. The final project report and exit strategy

D M Sergeant
EVIE Project
11th March 2005