JISC DEVELOPMENT PROGRAMMES

Project Document Cover Sheet

eIUS PROJECT PLAN

Project

Project Acronym	eIUS	**Project ID**	
Project Title	e-Infrastructure Use Cases and Service Usage Models		
Start Date	01/04/2007	**End Date**	31/03/2009
Lead Institution	University of Oxford		
Project Director	Michael Fraser		
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Partner Institutions	University of Manchester		
Project Web URL	http://www.eius.ac.uk/		
Programme Name (and number)	e-Infrastructure Programme		
Programme Manager	Ann Borda		

Document

Document Title	eIUS Project Plan		
Reporting Period			
Author(s) & project role	eIUS Project		
Date	10/07/2007	**Filename**	eIUS-ProjectPlan-1a.doc
URL			
Access	☒ Project and JISC internal		☒ General dissemination

Document History

Version	Date	Comments
0a	14/05/2007	First draft - for comment by project team.
0b	23/05/2007	Second draft.
1a	10/07/2007	Third draft – addressing feedback from programme manager.

JISC

JISC Project Plan Template

Overview of Project

1. Background

The UK is entering a period in which online collaborative environments, distributed computing and data resources, advanced analytical tools, together with support and training, are becoming readily available for researchers in all disciplines. Within some subject areas, such as high-energy physics and bioinformatics, the use of this "e-Infrastructure" already underpins everyday work. However, there are still many subject communities where the potential of this technology is either unknown, or is still in the process of being investigated. The deployment of e-infrastructure, whether within institutions, nationally or internationally, has the potential to increase the pace, impact, and efficiency of research both within and across disciplines.

If academic research in the UK is to build on the foundations laid by UK e-Science then it is essential first to understand the process by which different research communities can adopt e-infrastructure, and secondly to ensure that the required interfaces, support and training are put in place. The eIUS (pronounced 'ey-yus') project, led by Oxford University's Computing Services and e-Research Centre in partnership with NCeSS, is one of two complementary projects funded by JISC that aim to study current and planned usage of e-infrastructure, and also the perceived or actual barriers to uptake across research communities. Outcomes from the two projects will help identify and implement the appropriate interventions that will make e-Infrastructure available to a wider group of researchers.

2. Aims and Objectives

The eIUS project aims to gather and document concrete evidence of how e-infrastructure is, or is planned to be used as a facilitator of the research process across all major disciplines. This is not simply an information gathering project but rather is intended to broaden participation in the use and future development of e-infrastructure services. The project's specific objectives are to:

- develop a deep understanding of the e-Infrastructure services that are currently available in the UK, focussing on how they are used by the research community in all major subject disciplines;
- establish a self-sustaining community process to contribute to this shared understanding during and beyond the lifetime of the project; and
- contribute to the International e-Framework Initiative whose primary aim is to facilitate technical interoperability within and across education and research through improved strategic planning and implementation processes.

3. Overall Approach

The project intends to accomplish its objectives through an iterative process of experience capture and analysis carried out in conjunction with the UK research community. This methodology is expected to evolve throughout the lifetime of the project, and be significantly shaped by an initial scoping study, where a proposed methodology piloted and input solicited from key UK research community stakeholders. At the time of writing, our overall methodology, illustrated in , is proposed to consist of fieldwork consisting of recorded interviews and observational studies with active UK researchers, intertwined with analysis work producing three different but related outputs:

- *Experience Reports*, capturing concrete examples of the use of existing e-Infrastructure by individuals or groups of researchers;
- *Use Cases*, derived and linked back to the Experience Reports, to provide non-technical idealised 'stories' of how users are currently interacting (or intend to interact) with e-

Infrastructure to achieve specific research goals; and
- *Domain and Service Usage Models* (SUMs), describing patterns or combinations of e-Infrastructure services required to fulfill the specific Use Cases.

These outputs will be published early and often through a dedicated Community Portal hosted at NCeSS, to allow for frequent review and validation by the research community, as well to allow for content to be submitted by stakeholders external to the core project team.
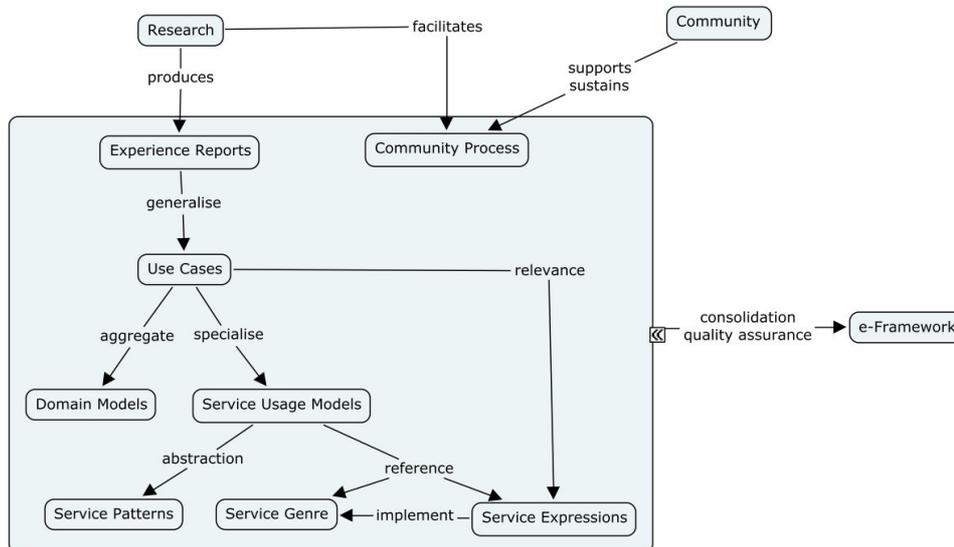

Figure 1 - proposed fieldwork and analysis methodology

Consent for the recording of interviews and activities and the use of this material will be obtained through the signing of formal consent forms. Overall, the project is subject to a formal ethical review process managed by the University of Oxford's Central University Research Ethics Committee (CUREC). It was agreed at the eIUS project kick-off meeting that the eIUS and Barriers to Uptake projects will aim to pool resources and coordinate fieldwork by developing a joint interview framework that will incorporate questions of relevance to both projects. It is expected that this will allow both projects to obtain data from a wider field of researchers and minimise the number of times interviewees are contacted, minimising interview fatigue.

Securing the participation of researchers in the study is clearly of paramount importance to the success of the project. However, as the project is not offering anything of direct benefit to them, the willingness of researchers to engage will be based primarily on the goodwill developed through the personal contacts members of the project team have with those active in subject communities. In disciplines where the project has fewer connections, there will be a reliance on introductions through contacts with UK e-Research projects and e-Infrastructure Service Providers. It is therefore vital that influential and well connected representatives of these initiatives are brought on board both to gain access to researchers in discipline areas where the consortium is less strong, but also to ensure the project secures strong support from these individuals who will be instrumental in influencing the reputation of the project within the UK research community.

Identification of these key stakeholders will begin in the project's initial scoping phase, where a matrix of active UK researchers, service providers, funders, and related initiatives will be established. This will help the project team identify any gaps in discipline representation, and individuals whose support will be needed to fill these gaps. Their engagement will be pursued on an individual-to-individual basis, where as a minimum the project team will attempt to secure a face to face meeting or telephone conference where stakeholders will be invited to contribute to the development of the project's methodology.

This bottom-up strategy attempts to create an overall sense of ownership over the project by the UK research community, making it more likely that its members will support the project. Input will also be solicited more visibly through the organisation of workshops, focus groups and other events designed

specifically to engage members of the UK research community.

4. Project Outputs

The full list of project deliverables is expected to expand as the project progresses and following its initial scoping phase. However, at the time of writing, the project is committed to producing at least the following:

- A scoping study report giving detailed recommendations for the project's methodology;
- At least 30 experience reports;
- At least 15 use cases;
- A series of Domain and Service Usage Models drawn from the Use Cases;
- Website and community portal with peer-review mechanism and process;
- Reports from workshops and other events designed specifically to engage the research community, and resource providers;
- A final report, providing a final overview snapshot of the evolving knowledge-base collected through the community portal, and making specific recommendations to resource providers and funders.

5. Project Outcomes

The outcomes envisaged for the end of the project include:

- A more accurate overview of UK research practice, including commonalities and differences, across a broad range of subject disciplines;
- A better understanding of how UK researchers currently, or intend to, interact with UK e-Infrastructure services;
- A consensus on the areas where e-Infrastructure can provide the most significant benefits, and where e-Infrastructure can facilitate collaboration across disciplines;
- Support for the work of the JISC e-Framework, particularly in the provision of domain and service usage models of relevance and applicability to the research community.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
UK e-Infrastructure Resource Providers	Obtaining a better understanding of research practice and how existing services might be developed further to better meet the needs of the UK research community, to help realise the benefits and increase the up-take of existing services. Strong support is required from UK resource providers in order to ensure the project develops and maintains a good reputation, to gain access to active researchers who the team does not have direct relationships with, and to help develop and refine the project's methodology.	HIGH
Projects with a similar remit to eIUS (completed or ongoing) e.g. SUPER, OSI e-Infrastructure WG, OeSS, Barriers to Uptake, e-Science Institute Adoption Theme	Strong support is required from related initiatives in order to ensure the project develops and maintains a good reputation, and to help develop the project's methodology. Related initiatives are also likely to benefit from the findings and lessons learnt from eIUS.	HIGH
UK Research Community	Obtaining a better understanding of what services are available and how these services might match their needs. Whilst members of the UK research community may not have a strong level of interest in the project, as	HIGH

	the primary source of usage data, the support and cooperation of members of the UK research community is critical to the success of the project.	
JISC	Gaining information to guide the development of future strategic e-Infrastructure funding programmes as well as realising the benefits and increasing the up-take of existing services. As the project's funding body, JISC has a need for the outputs of the project to be of high quality, and for the project to be deemed a success.	HIGH
Barriers to Uptake Project	Close cooperation and joint working with the Barriers to Uptake project is considered to be essential to the success of both projects, in particular through data sharing and coordinated fieldwork activities.	HIGH
JISC Committee Members	JISC committee members are likely to be high profile, well-respected and influential, and with a stake both in JISC, but also in the UK research and education community. Their support will be crucial to ensure the project develops and maintains a good reputation and to help develop and refine a credible methodology.	HIGH
e-Framework Initiative	The project will help the e-Framework to articulate services for the e-research community; obtain a critical mass of structured content and make a contribution to the e-Framework guidelines on the creation of domain and service usage models including, where appropriate, refining the definitions of e-Framework terminology.	MEDIUM
NCeSS	As a partner of the project and authority on e-Social Science, NCeSS has a need for the outputs of the project to be of high quality, and the project to be deemed a success.	MEDIUM
University of Oxford (OUCS/OeRC)	As the lead partner of the project, the University of Oxford has a need for the outputs of the project to be of high quality, and for the project to be deemed a success. In hosting the project, OUCS has an expectation that the project will also help inform the direction of its future service provision.	MEDIUM
Project Supporters	Project supporters have a need for the outputs of the project to be of high quality, and for the project to be deemed a success.	MEDIUM
Other Funding Bodies	Other bodies funding e-Infrastructure services for the UK research community are expected to benefit from the project in the same way as JISC but have no financial stake in the success of the project.	LOW

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Key staff may leave or be unavailable	2	4	8	Expertise is spread across a number of individuals at each institution, with the possibility of reallocation of staff.
Researchers or service providers reluctant to engage	3	3	6	Support received from a number of service providers. Each partner institution has a broad evidence

				base.
Difficulties in managing partnership may impact on project	1	4	4	Both institutions are experienced in working within consortium projects. A partnership agreement will be established early in the project and a memorandum of understanding agreed between this project and the Barriers to Uptake project.
Project does not keep pace with e-infrastructure developments	2	2	4	Community network intended to assist with knowledge gathering. Project will maintain close relationship with JISC e-Infrastructure Programme and the proposed Steering Group.
E-Framework process proves too complex to complete in lifetime of project	2	2	4	Early contact with e-Framework and work in collaboration with similar projects. Seek support from JISC Programme.

8. Standards

The Web Site and Community Portal will comply with all appropriate mark-up and accessibility standards. Where appropriate, Community Portal resources will be marked up with metadata complying with relevant standards such as Dublin Core, WSMO, and those developed by the Information Environment Service Registry (IESR).

9. Technical Development

The eIUS project is not intending to carry out any bespoke technical development as part of its remit. However, in parallel with the scoping study, NCeSS is responsible for implementing the Community Portal infrastructure based on off-the-shelf technologies, incorporating a document repository and peer-review technical mechanism. At the time of writing, BSCW, Sakai and the Alfresco Content Management System are being considered as potential candidate technologies. This technological choice will be made in the light of specific requirements gathered during the scoping study but a general options appraisal will be undertaken early on to facilitate rapid deployment.

10. Intellectual Property Rights

Under the two universities' policies on intellectual property (IP), all rights in IP created by their employees in the course of their employment will generally belong automatically to the university, except that the universities do not normally assert any claim to the ownership of copyright in scholarly materials. Results from this project will therefore be owned in the first instance by the universities as the employing institutions. The universities seek to maximise the commercial potential of its IP through their wholly-owned technology transfer companies. In accordance with the desires of the e-Infrastructure Programme it is proposed to release project deliverables under either a Creative Commons licence or, in the case of software, under an OSI-approved open source software license to maximise the benefit for the wider community. The Project will consult with OSS Watch about the choice of any open source software licence.

Project Resources

11. Project Partners

The project partners are:
- University of Oxford (lead)
- University of Manchester

A consortium agreement was signed on 14 May 2007, a copy of which has been sent to the programme manager.

12. Project Management

The full list of project team members are as follows:

- **Project Director and Principal Investigator (5%):** Michael Fraser, Oxford University Computing Services, 13 Banbury Road, Oxford, OX2 6NN, mike.fraser@oucs.ox.ac.uk, +44 (0) 1865 283 343
- **Co-Investigator (5%):** Marina Jirotka, Oxford e-Research Centre, 7 Keble Road, Oxford, OX1 3QG, marina.jirotka@comlab.ox.ac.uk, +44 (0) 610 613
- **Co-Investigator (5%):** Rob Procter, National Centre for e-Social Science, University of Manchester, Dover Street, Manchester, M13 9PL, rob.procter@ncess.ac.uk, +44 (0) 161 275 1381
- **Co-Investigator (5%):** Alex Voss, National Centre for e-Social Science, University of Manchester, Dover Street, Manchester, M13 9PL, alex.voss@ncess.ac.uk, +44 (0) 161 275 1384
- **Co-Investigator (5%):** Peter Halfpenny, School of Social Sciences, Dover Street Building, University of Manchester, M13 9PL, peter.halfpenny@ncess.ac.uk, +44 (0) 161 275 2493
- **Project Manager (40%) and Analyst (60%):** Matthew Mascord, Oxford University Computing Services, 13 Banbury Road, Oxford, OX2 6NN, matthew.mascord@oucs.ox.ac.uk
- **Research Officer (100%),** Mercedes Arguello Casteleiro, National Centre for e-Social Science, University of Manchester, Dover Street, Manchester, M13 9PL, Mercedes.ArguelloCasteleiro@manchester.ac.uk, +44 (0) 161 275 1384

The project manager (0.4 FTE) has responsibility for the day to day coordination of the project; including maintaining the project plan, developing the team, and contributing to the community engagement and dissemination work packages. The research officer and analyst (totalling 1.6 FTE), have responsibility for gathering data, developing the use cases and domain or service usage models. This work will be under the direction from the co-Investigators located within OUCS, NCeSS, and the Oxford e-Research Centre (together totalling 0.25 FTE).

The project will be supported by a joint steering committee with the Barriers to Uptake Project to be established by JISC. This will be made up of representatives of key stakeholders, both within the research community and from the UK e-infrastructure service providers. At the time of writing the terms of reference for this committee were in the process of being drawn up.

Formal project meetings of the investigators, project staff, and programme manager, will be held quarterly and be minuted.

13. Programme Support

The project team requests support from the programme and programme manager in the following areas:
- Identifying an appropriate third-party to carry out the formative project evaluation; advice on developing a brief for the evaluation.
- Alerting and introducing the project to contacts in related projects and initiatives.
- Servicing the joint project steering committee.
- Attending quarterly formal project meetings.
- Reviewing early drafts of project deliverables including progress reports and final report.

14. Budget

See Appendix A.

Detailed Project Planning

15. Workpackages

See Appendix B.

16. Evaluation Plan

The project will seek advice from JISC and the steering committee (once established) on developing an appropriate evaluation model. At the time of writing, there is the intention to commission a third party to conduct at least a formative evaluation that will explore how well the project is meeting its original aims and objectives and give recommendations on how the project might consider adjusting its strategy to tackle any issues. The audience for this evaluation will be the eIUS project team, its investigators, the steering committee, and JISC.

The timing of the evaluation should allow sufficient time for a reasonable amount of progress to have been made within the work packages, yet enough time before the end of the project for any recommendations to be implemented. It is anticipated that any such study would take a total of three months from commissioning to delivery. The project will seek advice from JISC on identifying an appropriate third party to conduct the evaluation, for which there is a budget allocation of approximately 4000 GBP.

The following non-exhaustive table indicates some of the key questions that this evaluation should address. Not considered here are the Experience Reports, Use Cases and SUMs, as the review of these outputs is already explicitly built into the project's overall methodology. In contrast, this project-level evaluation should concentrate on evaluating the effectiveness of the model review and validation process.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
02/2008 to 04/2008	Community Portal	How effective has the project been in soliciting feedback and/or content from stakeholders external to the core project team?	Analysis of community portal usage logs.	The community portal is attracting a good level of content from the research community.
02/2008 to 04/2008	Model Review and Validation	Is the peer-review process effective?	Review of proceedings of community engagement events. Online survey(s). Interviews with community portal users.	Proceedings from community engagement events indicate that the community critically engages with the models and that input is factored into the model development.
02/2008 to 04/2008	Stakeholder and Community Engagement	How successful has the project been in creating awareness?	Online survey(s). Analysis of JISCmail subscriber list. Analysis of web site and community portal access logs.	Evidence from surveys, JISCmail, and web site usage logs indicates a good level of awareness of the project.
02/2008 to 04/2008	Stakeholder and Community Engagement	Are similar projects, resource providers, and funders supportive of the aims and objectives of eIUS?	Interviews with representatives of related initiatives.	Positive attitudes toward project indicated.

Any formal summative evaluation, whether conducted internally, externally, at project or programme level, might also look to examine the following questions related to the project's contribution to the e-Framework and overall body of knowledge.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
01/2009 to 03/2009	Stakeholder and Community Engagement	To what extent has the eIUS project contributed to the e-Framework initiative?	Interviews with e-Framework representatives. Analysis of content contributed to e-Framework website.	e-Framework representatives indicate that the eIUS
01/2009 to 03/2009	Project Outcomes	To what extent has the project developed a more accurate overview of UK research practice, its use of e-Infrastructure services, and a consensus on where e-Infrastructure can benefit the research community within and across disciplines?	Track citations to project outputs.	Citations indicate project outputs have become established within the overall body of knowledge in this area.

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

17. Quality Assurance Plan

Output	Web Site				
Timing	**Quality Criteria***	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities****	**Quality Tools*** (if applicable)**
08/2007	Fitness for purpose	Review by project team and at community engagement events.	Sign-off by investigators, programme manager, and participants at community engagement events.	Investigators and programme manager.	
08/2007	Accessibility Legislation	Website follows W3C WAI guidelines.	Website passes automated accessibility checks.	Project manager.	Automated accessibility checking tools.
08/2007	W3C standards compliance.	Website follows W3C mark-up standards.	Website passes automated mark-up validation checks.	Project manager.	Automated mark-up validation tools.
Output	**Scoping Study Report**				
Timing	**Quality Criteria***	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities****	**Quality Tools*** (if applicable)**
08/2007	Fitness for purpose.	Feedback elicited on preliminary drafts by PIs and programme manager.	Sign-off by investigators and programme manager.	Investigators and programme manager.	
Output	**Experience Reports**				
Timing	**Quality Criteria***	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities****	**Quality Tools*** (if applicable)**
06/2007 to 11/2008	Authentic and accurate.	Preliminary drafts sent to interviewee for approval via email.	Sign-off by interviewee.	Interviewee.	
06/2007 to 10/2008	Fit for publication.	Final drafts circulated amongst PIs and programme manager.	Sign-off by PIs and programme manager.	Investigators and programme manager.	
06/2007 to 10/2008	Permission to publish granted.	Consent form.	Signed consent form.	Interviewee.	
Output	**Use Cases**				
Timing	**Quality Criteria***	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities****	**Quality Tools*** (if applicable)**
06/2007	Sufficient discipline	Review by project team and at	Provided in notes from community	Investigators,	

Timing	Quality Criteria*	QA Method(s)	Evidence of Compliance	Quality Responsibilities**	Quality Tools*** (if applicable)
to 11/2008	Coverage	community engagement events.	engagement events.	programme manager, and participants at community engagement events.	
06/2007 to 11/2008	Permission to publish granted where Use Case includes video vignette.	Consent form	Signed consent form.	Interviewee	
06/2007 to 11/2008	Appropriate level of detail.	Review by project team and at community engagement events.	Provided in notes from community engagement events.	Investigators, programme manager, and participants at community engagement events.	
06/2007 to 11/2008	Sufficient coverage of 'edge cases'.	Review by project team and at community engagement events.	Provided in notes from community engagement events.	Investigators, programme manager, and participants at community engagement events.	
Output	**Service Usage Models**				
Timing	**Quality Criteria***	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities****	**Quality Tools*** (if applicable)**
06/2007 to 12/2008	Fitness for purpose.	Review by e-Framework Initiative and participants at community engagement events.	Sign-off by e-Framework, and acceptance indicated in notes from community engagement events.	Investigators, programme manager, e-Framework initiative, and participants at community engagement events.	

Output	Community Portal				
Timing	**Quality Criteria***	**QA Method(s)**	**Evidence of Compliance**	**Quality Responsibilities****	**Quality Tools*** (if applicable)**
08/2007	Fitness for purpose.	User testing, review at community engagement events.	Evidence provided in notes from user testing sessions and community engagement events.	Manchester	
08/2007	Compliance with JISC technical standards.	Software selection methodology informed by JISC technical requirements.	Deployed software infrastructure has stated compliance with JISC technical standards.	Manchester	
08/2007	Accessibility	Content followed W3C WAI guidelines.	Website passes automated quality checks.	Manchester	Accessibility checking tools.

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* Quality Criteria: specify the criteria against which the quality of the output will be measured, e.g. fitness for purpose, best practice for processes, adherence to a specific standard or specification, usability, accessibility, validity, etc.
** Quality Responsibilities: list who is responsible for monitoring and ensuring the quality.
*** Quality Tools: list any tools to be used to help ensure the quality.

18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
May 2007	Project website.	All	Help raise initial awareness of the project.	
June 2007	NGS Users Forum	NGS Users	Raise awareness of the project. Engage with UK research community.	
June 2007	OeRC Launch Event	Oxford	Raise awareness of the project in Oxford.	
June 2007	e-Research Australasia (Ann Borda presenting)	e-Research community in Australia and the Asia Pacific Region	Increase the profile of the project overseas.	
September 2007	Paper presentation at AHM2007	UK e-Science Community	Increase the profile of the project in the UK and invite participation	
October 2007	e-Social Science 2007, Michigan, US	e-Social Science Community	Increase the profile of the project overseas.	
Midway	Article in high profile publication e.g. THES.	UK HE Community.	Significantly increase the profile of the project.	
Ongoing	Conference attendance/presentations/posters	UK researchers, UK e-Infrastructure Service Providers	Raise awareness of the project. Engage with UK research community.	
Ongoing	eIUS Workshops and Focus Groups	UK researchers and UK e-Infrastructure Service Providers	Events specifically designed to engage the UK research community and service providers.	
March 2009	eIUS Final Reports		Disseminate the final outputs of the project.	

19. Exit/Sustainability Plan

Project Outputs	Action for Take-up & Embedding

Body of Evidence	Contribution to partner universities' own strategic plans for the development of ICT infrastructure services that will enable and support world-class research.
Service Usage Models	Taken forward by the e-Framework Initiative, and acted upon by funding agencies.
Community Portal	NCeSS will underwrite the operation of the community portal as part of its existing IT infrastructure for the duration of five years.
Community Process	Develop a network comprising relevant partners from the research disciplines and JISC to oversee and nurture the community process after the project ends; apply the principles of successful community building articulated by OSS Watch. Apply for research network funding from the research councils.

Appendixes

Appendix A. Project Budget

[Omitted from public version.]

Appendix B. Workpackages

WORKPACKAGES	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M
1: Project Management	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
2: Survey and Scoping e-Infrastructure						■																		
3: Experience Reports						■	■	■	■	■	■	■	■	■	■	■	■	■						
4: Use Cases and Analysis								■	■	■	■	■	■	■	■	■	■	■	■					
5: Domain and Service Usage Models										■	■	■	■	■	■	■	■	■	■	■	■	■		
6: Stakeholder and Community Engagement		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
7: Model review and validation						■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
8: Community Portal				■	■			■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
9: Dissemination	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■			
10: Project Evaluation												■	■									■	■	■

Project start date: *01-04-2007*

Project completion date: *31-03-2009*

Duration: 24 months

Workpackage and activity	Earliest start date	Latest completion date	Outputs (clearly indicate deliverables & reports in bold)	Responsibility
WORKPACKAGE 1: Project Management **Objective:** Day to day coordination of the project, and team	01-04-2007	31-03-2009		**Oxford**

leadership throughout the project. Project management will be undertaken by 0.4 FTE based at Oxford.				
1. Recruit 1.0 FTE research officer at Manchester	01-04-2007	31-05-2007		
2. Establish internal project management system.	01-04-2007	31-05-2007		
3. Develop and agree project plan.	01-04-2007	31-05-2007	**Project Plan**	
4. Report to JISC as required during the lifetime of the project.	01-04-2007	31-03-2009		
5. Organise formal project meetings (frequency to be determined at eIUS kick-off meeting).	01-04-2007	31-03-2009		
6. Manage project budget.	01-04-2007	31-03-2009		
7. Final report	01-01-2009	31-03-2009	**Final report**	
WORKPACKAGE 2: Survey and Scoping e-Infrastructure ***Objective:*** Through desk research and consultation with stakeholders and service providers, this workpackage will provide an analysis of existing and planned activities relating to user requirements, use case development and other formal means of recording interactions between researchers and e-infrastructure services or tools, to inform the project's overall methodology. The output of the workpackage will be a report making recommendations for the next phase of the project.	01-05-2007	30-09-2007		**Oxford**
8. Develop matrix of similar initiatives (e.g. SUPER OSI e-Infrastructure Working Group), e-Infrastructure Resource providers, and funding agencies. Identify key contacts within these initiatives.	01-05-2007	30-09-2007		
9. Develop matrix of generic e-Infrastructure service types based on lists of services provided at a group, departmental, institutional, national, and international level. Identify and agree services that should be considered e-Infrastructure and those that should not.	01-05-2007	30-09-2007		
10. Develop glossary of terms - seek agreement from JISC, and the e-Framework.	01-05-2007	30-09-2007		

11. Develop matrix of active UK research practitioners. (Individuals who spend a significant proportion of their time doing research whether funded through an employer or self-funded.) Identify gaps in discipline representation, and contacts needed to fill these gaps.	01-05-2007	30-09-2007		
12. Develop release forms for interviews & focus groups.	01-05-2007	30-09-2007		
13. Develop interview framework in conjunction with the Barriers to Uptake project.	01-05-2007	30-09-2007		
14. Pilot fieldwork and analysis methodology - review interview framework in light of results.	01-05-2007	30-09-2007		
15. Prepare report making recommendations for next phase of project.	01-05-2007	30-09-2007	**Scoping study report**	
16. Organise formal project meeting including JISC PM to discuss scoping study report and agree on plan for next phase.	07-09-2007	14-10-2007		
17. Prepare revised project plan, and submit to JISC.	07-09-2007	30-10-2007	**Revised project plan**	
WORKPACKAGE 3: Experience Reports Objective: The primary activity underpinning this workpackage will be a series of short and focused observational studies and interviews with active research practitioners in the UK, generating a series of experience reports. Additionally, the community will be encouraged to contribute material - this will be edited and integrated with the overall corpus by the project team.				**Oxford & Manchester**
18. Make contact with research practitioners and seek introductions through intermediaries, establish willingness to be interviewed.	01-05-2007	31-10-2008		
19. Schedule interviews with researchers.	01-10-2007	31-10-2008		
20. Write-up interviews as experience reports.	01-10-2007	31-10-2008		
21. Edit externally submitted content.	01-10-2007	31-10-2008		
22. Send experience reports to interviewees and seek consent for publication.	01-10-2007	31-10-2008		
23. Publish experience reports through community	01-10-2007	31-10-2008	**30+ Experience Reports**	

portal.				
WORKPACKAGE 4: *Use Cases and analysis* **Objective:** Use cases will be assembled according to research goals common to a number of experience reports. Each use case will comprise a series of scenarios differing in the actors involved and/or the means used to achieve the goal. In this way the project hopes to capture the similarities as well as differences between different experiences and make them available in a more generic form that simplifies matching any given case with the model. The use cases will be fed back to the community for validation and comment at regular points and responses will feed iteratively into their development.				Oxford & Manchester
24. Analyse experience reports	01-11-2007	30-11-2008		
25. Develop use cases	01-11-2007	30-11-2008		
26. Publish use cases through community portal	01-11-2007	30-11-2008	**15+ Use Cases**	
WORKPACKAGE 5: Domain and Service Usage Models **Objective:** This workpackage will undertake a deep analysis of the use cases to derive a series of service usage models. Each model will relate to a defined research process within the subject domain (but noting where the SUM might be applicable to other domains), and articulate the relevant service patterns and the required service genres or service expressions. The SUMs will be developed in accordance with, but also in dialogue with, the e-Framework. One outcome from this work is likely to be a contribution to the e-Framework guidelines for the creation of domain and service usage models.				Oxford & Manchester
27. Analyse use cases	01-01-2008	31-12-2008		
28. Develop SUMs and Domain Model(s)	01-01-2008	31-12-2008		
29. Publish SUMs and DMs through the Community	01-01-2008	31-12-2008	**A series of SUMs and Domain Models.**	

Portal.				
WORKPACKAGE 6: Stakeholder and Community Engagement **Objective:** This workpackage will operate throughout the project and is intended to undertake community building around the project and help develop a sustainable model for future development and refinement of the use cases and SUMs.				**Oxford & Manchester**
30. Develop working relationship with the Barriers to Take-Up project.	01-04-2007	31-03-2009		
31. Identify key stakeholders: influential representatives of related initiatives, e-Infrastructure resource providers & funders, and academic champions.	01-04-2007	31-03-2009		
32. Sell concept to key stakeholders through face to face meetings or phone conferences, inviting them to contribute to the development of the project's methodology. Aim to develop sense of ownership over the project by key stakeholders.	01-04-2007	31-03-2009		
33. Organise and promote community engagement events bringing together resource providers and researchers at key points in the project, to achieve consensus on methodology and develop the Use Cases and SUMS further, producing milestone versions of the corpus.	01-04-2007	31-03-2009		
34. Write up community engagement events.	01-04-2007	31-03-2009	**Reports from community engagement events**	
WORKPACKAGE 7: Model review and validation **Objective:** This workpackage will establish a peer-review mechanism to provide an element of quality assurance for the use cases and SUMs. Within the iterative cycle for the development of these components it is essential to seek and receive validation if the outputs are to be useful for both the research community and the future development				**Oxford & Manchester**

of e-infrastructure components.				
35. Develop peer-review technical mechanism as part of the Community Portal.	01-07-2007	30-09-2007		
36. Develop the peer-review process.	01-07-2007	30-09-2007		
37. Prepare supporting documentation.	01-07-2007	30-09-2007		
38. Publish peer-review mechanism documentation.	01-07-2007	30-09-2007	**Peer review mechanism for the Use Cases**	
WORKPACKAGE 8: Community Portal Objective: The aim of the infrastructure work package is to create a community portal that allows resources produced by the project to be worked up, managed, quality assured and consumed. A document repository will be implemented to allow the experience reports, use cases, domain models and service usage models to be created and iteratively refined through a community process. Service usage models adopted by the e-Framework can link back to the community process and the other resources that have been created to underpin their formulation.				**Manchester**
39. Develop requirements for the community portal.	01-07-2007	31-07-2007		
40. Decide and agree technology platform.	01-07-2007	31-08-2007		
41. Implement Community Portal	01-07-2007	30-09-2007	**Community portal underpinned by a document repository**	
WORKPACKAGE 9: *Dissemination* Objective: This workpackage, running throughout the project, will exploit the network of stakeholders created in workpackage 6 as well existing links with key UK e-Science stakeholders. As part of the dissemination activities, a workshop will be arranged and the project will disseminate to the wider research community through appropriate conferences and journals. The project team will also respond to invitations to contribute to events and publications (e.g. organised by participating service providers and projects) as resources permit.				**Oxford & Manchester**

42. Submit web template to JISC	01-04-2007	31-05-2007	**Web template.**	
43. Establish domain name and initial web site.	01-04-2007	31-05-2007	**Project website**	
44. Establish JISCmail mailing list.	01-04-2007	31-05-2007	**JISCmail list**	
45. Establish RSS newsfeed.	01-04-2007	31-05-2007	**RSS newsfeed**	
46. Write papers and presentations for relevant conferences and journals.	01-04-2007	31-03-2009	**Papers and presentations.**	
47. Attend relevant events as resources permit.	01-04-2007	31-03-2009		
48. Organise workshop, possibly in collaboration with an appropriate event or organisation (e.g. eSI).	01-04-2007	31-03-2009		
49. Write up workshop.	01-04-2007	31-03-2009	**Workshop proceedings**	
WORKPACKAGE 10: Project Evaluation **Objective:** Commission a formative evaluation of the project approximately half-way through the course of the project. At the time of writing, the arrangements for this evaluation were still in the process of being formulated.				**Oxford**
50. Seek advice from JISC on arrangements for project evaluation, including the identification of an appropriate third-party to carry out the evaluation.	01-04-2007	31-01-2008		
51. Develop brief for the project evaluation.	01-01-2008	31-01-2008		
52. Commission evaluation.	01-02-2008	30-04-2008		
53. Implement recommendations.	01-05-2008	31-03-2009		