



Project Plan: Worcester LearningBox Repository

Overview of Project

1. Background

The University of Worcester would like to start up a new repository for learning and teaching materials based on the “LearningBox” repository system developed through the JISC EdShare and Faroes projects. We will do this in partnership with Southampton University, which developed the software.

Based on its substantial experience of running a repository for learning and teaching, the team at Worcester has evidence that the conventional repository structure and metadata system is not suitable for the day-to-day online materials used in learning and teaching. However the LearningBox approach takes a fresh direction which we feel meets users’ needs far better; it adopts a Web 2.0 style, uses tags rather than conventional metadata, has engaging user-centred management facilities and offers flexibility in use, adaptable to the individual’s way of working.

The University has completed a two-year project supported by JISC funding, the aim of which is to embed repository use in the institutional culture and staff working practices. The final report went to JISC on 31 March 2008. We feel we have successfully integrated repository use, our new research and publications repository (based on EPrints) has been developed and welcomed by staff, and the Information and Learning Services has evolved its structure to incorporate both management and support for repository use across the university. We also set up a conventional style repository for learning and teaching materials but found this to be underused, not because of lack of willingness amongst teaching staff, but because it did not fit with the way they work and manage their resources. This situation is not uncommon. The project ran a programme level event for all the current projects with learning and teaching repositories in June 2008 and found a similar picture everywhere. This has been echoed in the December 2008 JISC report, *Good Intentions*. Though a conventional repository can be useful for centrally managed collections of resources, it is not appropriate for general learning materials used on a daily basis by teachers and students. To achieve successful management of these resources a new type of repository is needed, and LearningBox promises to provide one.

A further reason for wishing to start up a LearningBox repository is that it is part of a wider development within the JISC community and we feel that such a repository will be developed further, and therefore provides the university with a system which has a strong future. Also LearningBox is not going to be unique to Worcester, there is likely to be a community of users of similar repositories in different universities linked within the JISC network. The University of Worcester now has good procedures and practices for supporting repository use and will find it straightforward to incorporate a new repository, and within this supportive environment both sustain and develop it.

1.1 Baseline Research

There is considerable debate within the JISC community about the best way of coping with learning and teaching materials. Many universities who have set up repositories are finding it very difficult to encourage lecturers to contribute their materials, despite the fact that the lecturers are happy uploading material to the VLE, and the same lecturers happy to upload their research papers to a research repository. This is what we found at Worcester in our JISC-supported project DRaW (*Developing Repositories at Worcester: extending and embedding the university repository service*, <http://www.worc.ac.uk/drawproject/>) whose final report is due 31 March 2009. It is also what other projects found, reported at a programme level event organised at Worcester held June 2008, leading to a collaborative discussion paper *Repositories for learning and teaching materials: our recipe for success* (<http://www.worc.ac.uk/drawproject/documents/DRaWeventreport.doc>) in which the authors felt that though conventional repositories might best deal with centrally managed collections of resources, lecturers' materials would be more successfully managed within a Web2.0 approach with tags rather than metadata, a simpler and more flexible structure. The same debate is reflected in the December 2008 JISC report *Good intentions: improving the evidence base in support of sharing learning materials* (<http://ie-repository.jisc.ac.uk/265/>), not to mention the many discussions published on the JISC-repositories mailing list.

The baseline research mentioned above shows the motivation for our approach and will provide the basis for our evaluation methodology. We will study the reaction of lecturers to using tags rather than metadata and this will contribute to the overall evaluation of the impact of the project on the university.

As well as the work carried out at Worcester, by working with other institutions we intend to contribute to giving reliable feedback on this kind of development to the whole community. The repository developed here would be usable in, and available to, other universities. Perhaps it is optimistic, but the project will help everyone make decisions about the best way to work with educational materials and will provide examples and tools to help them move forward.

1.2 Sustainability

The current project DRaW has resulted in a supportive environment for repository development at Worcester. The project steering group will co-ordinate evaluation for the project, but through cross membership, this work will be linked to that of the university Repository Development Steering Group which will take the development forward.

Across the national JISC community the project intends to work alongside others involved with setting up a similar type of repository. Our partner, Southampton University, is seeking funding to set up and support a community of practice around this area, but irrespective of this specific funding we have every intention of keeping networking with others. Our principal dissemination will therefore be through JISC activities either at national or programme level, together with the publication of relevant papers and reports.

After the end of the project, Southampton University will still continue to work at the heart of extending the scope of LearningBox, for example linking to VLE and adding further social networking features. Worcester looks forward to participating in this and allowing its initial implementation to evolve accordingly.

2. Aims and Objectives

Aims:

- i. Implement a repository at the University of Worcester that will, over time, increase the amount of teaching material deposited which is available for re-use and sharing.
- ii. Give staff a system which enables them to manage their own resources themselves in a way which suits their own needs and also enables them to control access by anyone they might share with.
- iii. Improve the capacity for teaching staff to both deposit and retrieve items in many formats, such as: video, image, sound and text.
- iv. Initiate an institutional change that enables the university to move closer towards a more sustainable approach to the strategic management of its learning and teaching materials

Objectives:

- i. Write project plan.
- ii. Set up the team, organise a meeting schedule and methods of contact.
- iii. Design the user interface in collaboration with: developers at Southampton, library staff and technical services staff at the University of Worcester.
- iv. Implement the repository in collaboration with Southampton technical team.
- v. Develop the system so it incorporates a link between LearningBox and the university video upload system "Release".
- vi. Investigate how we might transfer items from our current repository to the new one – carry this out if viable.
- vii. Test the repository with sample users drawn from teaching teams and others at the University of Worcester.
- viii. Make any changes based on user feedback.
- ix. Promote the repository more widely to users/potential users at the University of Worcester through public launch in January 2010.
- x. Increase the numbers of items in the repository if the promotion is successful.
- xi. Review the repository in the light of any lessons learnt
- xii. Embed the repository in ILS and lecturer's working practice.

3. Overall Approach

The project will be organised into three workpackages:

Workpackage 1 – Setting up the project. This stage includes appointing the Project Manager, finalising the Project Plan, Project Website, Partnership Agreement, carrying out a baseline research review and detailing evaluation methodology. Also this stage will include the two universities agreeing the immediate software development requirements.

Milestones:

[M1] Delivery of project set-up material (May 2009)

[M2] Creation of version of software ready for installation (September 2009)

Workpackage 2 – Implementing Worcester LearningBox. Installation. Testing. Feedback from pilot users, software modified.

Milestones:

[M3] System running ready for testing (October 2009)

[M4] System ready for public launch at the university (January 2010)

Workpackage 3 – Monitoring and reporting. Monitoring wider usage in the university. Preparation of JISC Final Report and other related publications.

Milestone:

[M5] Publication of project reports and JISC Final Report (March 2010)

The Project Manager will be based at Worcester and will co-ordinate the project, and be responsible for liaison with JISC. Worcester will work with Southampton to install the system, then test it, enrol the help of pilot users for detailed testing, launch the system across the university and prepare evaluation reports.

The team at Worcester is experienced in all these processes, having carried them out for its two existing repositories. We are also very interested in obtaining evidence about the views of teachers regarding the use of tagging rather than formal conventional metadata, and indeed their attitude to this Web2.0 approach generally. So we will include a mini research investigation into users' attitudes, which will lead to supplementary reports and possibly conference/research papers.

At Worcester the key stakeholders are the support staff in Information and Learning Services and, of course, the practitioners: the teaching staff. The ILS has, through its engagement with earlier projects demonstrated a clear commitment to supporting and sustaining repository use. The Project Director and most of the Project Team are members of ILS so this group of people are strongly represented and integrated into the work of the project.

Workpackages 2 and 3 of the project involve directly working with practitioners. We have considerable experience of why teaching staff avoid uploading material to repositories even though they are happy to upload material to VLEs and to external Web2.0 systems such as Flickr, Slideshare and YouTube. One reason, for example, is the matter of metadata. Even within a conventional repository such as EPrints, each type of item (paper, conference presentation, chapter in book, etc) requires a different screen of metadata, and for learning and teaching materials the huge variety of types and purposes makes conventional metadata schemes cumbersome and complex. Lecturers are reluctant to get involved with this. Therefore we have good evidence that a system such as LearningBox which has minimal metadata but uses user-generated tags will genuinely meet user needs. The system offers the flexibility users need yet only a simple, minimal amount of information is required. And there are other improvements to meeting user needs we have investigated already. So we are convinced we can work effectively with practitioners and offer them a new, more suitable approach.

4. Project Outputs

The key **project deliverables** are (a) a fully functioning repository, and (b) a collection of evaluation/research reports.

At Worcester, the E-Learning Team has developed a media streaming service based on an in-house system (rather like YouTube) where staff upload videos etc and the file formats are automatically taken care of. We would like to integrate this system with the new repository.

5. Project Outcomes

The outcomes of the project will be to:

- Develop a better understanding of lecturers' reactions to using tags rather than having to key in metadata. We are interested to know if our current users would prefer this type of system, and if we can attract a higher population of new users to the LearningBox system than we did with the old one.
- Develop a model for institutional repository structure usable by other universities. We have been experimenting with repositories at UW for some time now, and have previously published guidelines and advice on institutional use of repositories. This project will allow us to explore further tutors' reaction to a new style repository, and to review the guidelines based on our new results.
- Improved networking across the HE educational sector and better provision of repository systems for managing resources. Repositories have yet to establish themselves as a "must have" for many institutions. The trial and implementation of LearningBox at our institution will allow us to not only influence the design of the user interface but to build up collection of managed resources for both the University and its partners.
- Collect user feedback - which will help the University of Southampton make decisions about the design of the system and examine how it might be customised for use by other institutions.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
University of Worcester Repository Steering Group	High	High
University of Worcester teaching staff	Medium	High
University of Worcester Information and Learning Services team	Medium	Medium
University of Worcester partner colleges	Medium	Medium
University of Southampton technical team	High	High

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (P x S)	Action to Prevent/Manage Risk
Staffing	4	5	20	The project will rely on help from University staff to manage the contributions to the repository and set up user tests. Although the project manager has been resourced and is in place, we will negotiate any extra staff time needed. This may mean adjustments to the budget as and when.
Organisational	2	4	8	Some organisational problems may occur as the organisation at UW is complex but good relationships have been developed through previous projects.
Technical	1	5	5	The project does rely on a high level of technical competence, but technical expertise at both institutions is high
External suppliers	1	1	2	The project does not rely on external suppliers other than server space.
Legal	2	2	4	There are very few legal implications.
Users	5	5	25	The project will rely on goodwill of users to test the system. As most of the implementation will take place over the summer users may be difficult to contact until the autumn. Initially we will ask staff who have shown an interest in repository projects before to trial the system.

8. Standards

The Learning Box repository is built using JISC recommended open standards.

9. Technical Development

- Technical development will be done by the two teams at Southampton and Worcester.
- Worcester has worked with Southampton on a similar implementation without any problems.
- The team at Worcester will allow Southampton developers to remotely upload files to the Worcester server.
- The repository will run alongside our EPrints repository on the same virtual server as this is the best option.
- The repository will be managed and backed up at regular intervals.

Support from Southampton

The project will include technical support from the University of Southampton who developed the LearningBox in the EdShare and Faroes projects. The system is based on the EPrints repository and consists of a combination of extensions and server tools. No substantial development work will be required, however the Southampton team will assist the project in a number of ways:

- Technical assistance with setting up a local version of the repository software on a Worcester sever, and configuring it for a new web domain. The initial set-up phase will also require a variation of the look-and-feel to be developed.
- Technical support for the duration of the project in order to deal with any emergent problems and fix reported bugs. The LearningBox is a stable piece of software, however we expect an extended deployment to create enough feedback for minor usability revisions to be made.
- Development of feature enhancements necessary for a Worcester-wide deployment. These may be relatively minor technical changes rather than new feature-sets, but will enable the LearningBox to better fit the working practices of Worcester's teaching staff.
- Assistance to hand over technical support to local information technologists. This is required for sustainability beyond the end of the project and will take the form of documentation and training.
- The above paragraphs represent the core of the Partnership Agreement which will be drawn up between the two universities. As far as IPR is concerned, all parties are happy for all software and published reports and papers to be available to others without copyright restrictions.

10. Intellectual Property Rights

N/A

Project Resources

11. Project Partners

Project Acronym: WLBR
Version: 1
Contact: v.bell@worc.ac.uk
Date: 19:06:2009

University of Worcester
University of Southampton

The partnership agreement is still being negotiated and will be presented in the September progress report.

12. Project Management

University of Worcester Team:

Name	Role/responsibility	Contact
University of Worcester Team		
Andrew Rothery	Project Director	a.rothery@worc.ac.uk
Viv Bell	Project Manager, time spent on project 0.4 of full-time	v.bell@worc.ac.uk
Janet Davidson	WRaP representative.	j.davidson@worc.ac.uk
Elizabeth Symonds	Lead Learning Technologist at UW will act in advisory capacity	e.symonds@worc.ac.uk
Adam Newton	Technical systems development and support	a.l.newton@worc.ac.uk
James McKie	Technical support and integration of University "Release UTube" into repository	j.mckie@worc.ac.uk
University of Southampton Team		
Dave Millard	Technical developer working on LearningBox, EdShare and OneShare project	dem@ecs.soton.ac.uk
Patrick McSweeney	Technical developer working on Learning Box, EdShare and OneShare project	pm5@ecs.soton.ac.uk
Yvonne Howard	Project manager for OneShare project (was FAROES)	ymh@ecs.soton.ac.uk

13. Programme Support

N/A

14. Budget

See Appendix A

Detailed Project Planning

15. Workpackages

Workpackage 1 – Setting up the project. This stage includes appointing the Project Manager, finalising the Project Plan, Project Website, Partnership Agreement, carrying out a baseline research review and detailing evaluation methodology. Also this stage will include the two universities agreeing the immediate software development requirements.

Milestones:

[M1] Delivery of project set-up material (May 2009)

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Milestone:

[M5] Publication of project reports and JISC Final Report (March 2010)

16. Evaluation Plan

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Jan 2010	Implementation of repository	Was the implementation successful	Repository Development group to sign off	Repository will be available for staff to upload at UW and browsable from outside UW.
Jan 2010	Engagement of Users	Can users upload items into the repository and easily access all other features	Repository Development group to assess success based on user trials	Users signed up and evidence of repository being used

17. Quality Plan

Output	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities	Quality tools (if applicable)
Jan 2010 onwards	Management and upkeep of repository	Repository will be controlled and managed by the Repository Development Group at UW	Fully functioning repository. Engagement with staff.	The RDG will oversee the development and ensure that procedures are in place to: check the functionality of	N/A

				the repository, provide user support, inform users of IPR and copyright rules and continue to promote use of the repository to university staff and partners. This group meet regularly and have successfully maintained the Eprints repository at UW.	
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18. Dissemination Plan

Timing	Dissemination Activity	Audience	Purpose	Key Message
Jan 2010 onwards	All staff event at UW	Staff and partner colleges	Promote repository and increase usage	Repository there to help staff manage their own resources. A valuable resource!
Jan 2010 onwards	National Event	All those interested in repositories nationally	To raise issues about repositories and bring together differing views and approaches to design and delivery.	Disseminate what we learnt in our development. Give guidance and listen to others who have developed similar systems.
Jan 2010 onwards	Participation in Southampton Networking Scheme	Those who are involved with Language Box, Humbox and other similar repositories.	Feedback from us on how the repository has been received at UW. Communicate with development team at S/Hampton.	What have we learnt from the development? What messages can we pass on. Is a Web2 style repository the future?

19. Exit and Sustainability Plans

Project Outputs	Action for Take-up & Embedding	Action for Exit
Repository	Will be sustained and maintained by the ILS at UW. This team already look after the two current repositories	Hand over to ILS.

	and make sure they are backed up, updated if new versions become available and user support is provided.	
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Project Outputs	Why Sustainable	Scenarios for Taking Forward	Issues to Address
Repository	Will be used by UW staff, will become part of the service offered to staff by ILS	The Repository Development Group will continue to move forward with new ideas for populating and increasing usage of the repository	Getting staff on board. Modifying staff workflows so they include the repository. Updates and new features.
Content	Content will increase over time and will be a valuable resource for teaching staff	Promote content to new tutors. Support those keen to produce content and promote to all. This is ongoing and in line with the way the current repositories are promoted at UW.	Maintaining high quality content. Attracting new content on a regular basis.
Documented guidelines	Important to document guidelines and procedures as our partners and others will be interested in the future of this repository and others.	Keep the RDG alive and make sure they have method of disseminating advice and guidance to those interested in repository development.	Keeping informed with current thinking and maintaining links with other repository groups nationally.

Appendixes

Appendix A. Project Budget

The budget was revised June 2008 to reflect that the entire grant will be available to fund the work carried out at Worcester

Budget Table				
Directly Incurred Staff	Apr09–Mar10	Apr10 – Mar11	Apr11 – Mar12	TOTAL
Project Manager Worcester 0.4FTE	£ 15,708	£	£	£ 15,708
Additional staff support e.g. additional hours ILS staff, consultancy, part time learning technologist	£ 7,789	£	£	£ 7,789
Total Directly Incurred Staff (A)	£ 23,497	£	£	£ 23,497
Non-Staff				
Non-Staff	Apr09–Mar10	Apr10 – Mar11	Apr11 – Mar12	TOTAL £
Travel and expenses For Worcester staff, visitors and events	£ 1,750	£	£	£ 1,750
Hardware/software	£ 500	£	£	£ 500
Dissemination	£	£	£	£
Evaluation	£	£	£	£
Other stationery etc	£ 550	£	£	£ 550
Total Directly Incurred Non-Staff (B)	£ 2,800	£	£	£ 2,800
Directly Incurred Total (C) (A+B=C)	£ 26,297	£	£	£ 26,297
Directly Allocated				
Directly Allocated	Apr09–Mar10	Apr10 – Mar11	Apr11 – Mar12	TOTAL £
Staff Worcester Project Director (18 days) plus Project Team (total 60 days – 0.25FTE) £9,794	£ 12,553	£	£	£ 12,553
Estates	£ 11,083	£	£	£ 11,083

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Other	£	£	£	£
Directly Allocated Total (D)	£ 23,636	£	£	£ 23,636
Indirect Costs (E)	£ 38,099	£	£	£ 38,099
Total Project Cost (C+D+E)	£ 88,032	£	£	£ 88,032
Amount Requested from JISC	£ 29,708	£	£	£ 29,708
Institutional Contributions	£ 58,324	£	£	£ 58,324
Percentage Contributions over the life of the project	Partners 66 %	JISC 34 %		Total 100 %