



Project Management

First Year Annual Report

| | |
|--------------------------|---|
| Editor/Author: | John Paschoud |
| Project Document Number: | HL-1998-06 |
| Date completed: | 1-Aug-1998 |
| Task: | 0.6 |
| Status: | ADOPTED |
| Version: | 1.0 |
| Keywords: | HeadLine annual report 1998 |
| Abstract: | - This is the required Annual Report on the HeadLine project, covering the period 1st January 1998 to 31st July 1998 |
| Confidentiality: | PUBLIC |
| Copyright: | LSE/LBS/UH |
| Edit source file: | P:\HEADLINE\ProjMan\annrep80731.doc |
| Reference URL/URI: | http://decomate.lse.ac.uk/headline/public/annrep98.html |
| Last saved: | 8 October 1998 |

London School of Economics • London Business School • University of Hertfordshire

The HeadLine project is partly funded by the Joint Information Systems Committee (JISC) of the Higher Education Funding Councils, as part of its Electronic Libraries Programme (eLib)

Contents

| | |
|---|----|
| Activities and Progress | 3 |
| Establishment of Management Arrangements & Bodies | 3 |
| Dissemination | 3 |
| Assessment of Library Resources | 3 |
| Assessment of other Relevant Projects and Technologies..... | 3 |
| Learning from the process of implementation | 5 |
| Interim evaluation results..... | 6 |
| Future development | 7 |
| Appendices..... | 8 |
| Outline of Phase 1 Workpackage/Task structure..... | 8 |
| Calendar of Dissemination Activities | 9 |
| Expenditure Summary | 12 |

Activities and Progress

The Project has passed its major milestone of commencing, on the scheduled start date of 1 January 1998. No further major milestones were either scheduled or achieved within the period covered by this report.

Establishment of Management Arrangements & Bodies

The Project Board has met in February 1998, April 1998 and June 1998, at each of the three partner institutions. In addition to formal meetings, the Board has successfully used an email list to circulate, discuss and agree items of interim business, and has established an ad hoc protocol for such 'online consensus'.

The Project Steering Committee has met once, at LSE in May 1998. The formal meeting was followed by an informal meeting, to which all staff involved in the Project were invited. As some Steering Committee members were not able to attend this meeting (despite protracted prior negotiation of dates), one or more informal opportunities will be provided for Steering Committee members to meet members of the Project Team, and be briefed on the objectives and progress of the Project.

Project management documentation comprising the:

- Project Plan
- Project Communications Plan
- Project Evaluation Plan

has been completed, approved by the Project Board and submitted for approval to the eLib Programme Office by the deadlines agreed between the Project Manager and the eLib Programme Director; Formal approval of and/or detailed responses to these documents are currently awaited.

Staff have now been recruited or seconded to fill the three posts approved in the Project Proposal, although the Project Officer (based at LSE) was not in post until mid-April 1998.

A detailed Technical Workplan for Phase 1 of the project has been prepared as a working document, and is currently being used to agree allocation of Tasks and work calendars amongst individual staff involved in the project. An Outline of the Phase 1 Workpackage/Task structure defined in the Technical Workplan is appended to this report.

Dissemination

In accordance with the Project Communications Plan, a number of opportunities have been taken to publicise the project. In particular, the project has made available an interim 'flyer' (pending availability of the revised eLib Programme publicity pack) and distributed this to a number of relevant conferences. A Web-based 'slideshow' presentation has also been prepared to be usable by any member of the project team to explain the project to various types of 'audience'; This has been used to date with library staff at LSE, members of the project Steering Committee and external visitors interested in the project. A database log is maintained of forthcoming and completed dissemination 'events', and a summary report from this is appended to this report.

Assessment of Library Resources

In anticipation of tasks to be formally specified in the Technical Workplan, a significant amount of work has already been undertaken on the identification, classification and prioritisation of library resources, spanning the current holdings (either physical or accessible) of all three partner institutions and a variety of media.

Assessment of other Relevant Projects and Technologies

Similarly, significant progress has also been made in reviewing available information from other relevant sources and projects (within and outside the UK eLib Programme) to identify data

models, techniques, standards and software tools that may be usable or adaptable to meet the objectives of HeadLine.

Learning from the process of implementation

No significant unanticipated difficulties have been encountered to date in starting up and managing the project, although the prescriptive format (and resulting staff time commitments) for project management documentation was not entirely clear to the prospective partners at the proposal/approval stage (i.e. prior to the project start date) and complying with these requirements has caused some delay in the finalisation of a detailed workplan, and therefore in the commencement of substantive work according to that plan.

Some benefit has been gained from liaison and collaboration with other eLib Phase 3 Hybrid Libraries projects, particularly in the coordination of planned dissemination activities.

No changes have been made to the Project Plan since its submission to the eLib Programme Office in March 1998. However, formal approval of the Project Plan (together with the associated Communications Plan and Evaluation Plan) has not yet been received from the eLib Programme Office, and therefore it is possible that these will be revised in the light of feedback received.

Interim evaluation results

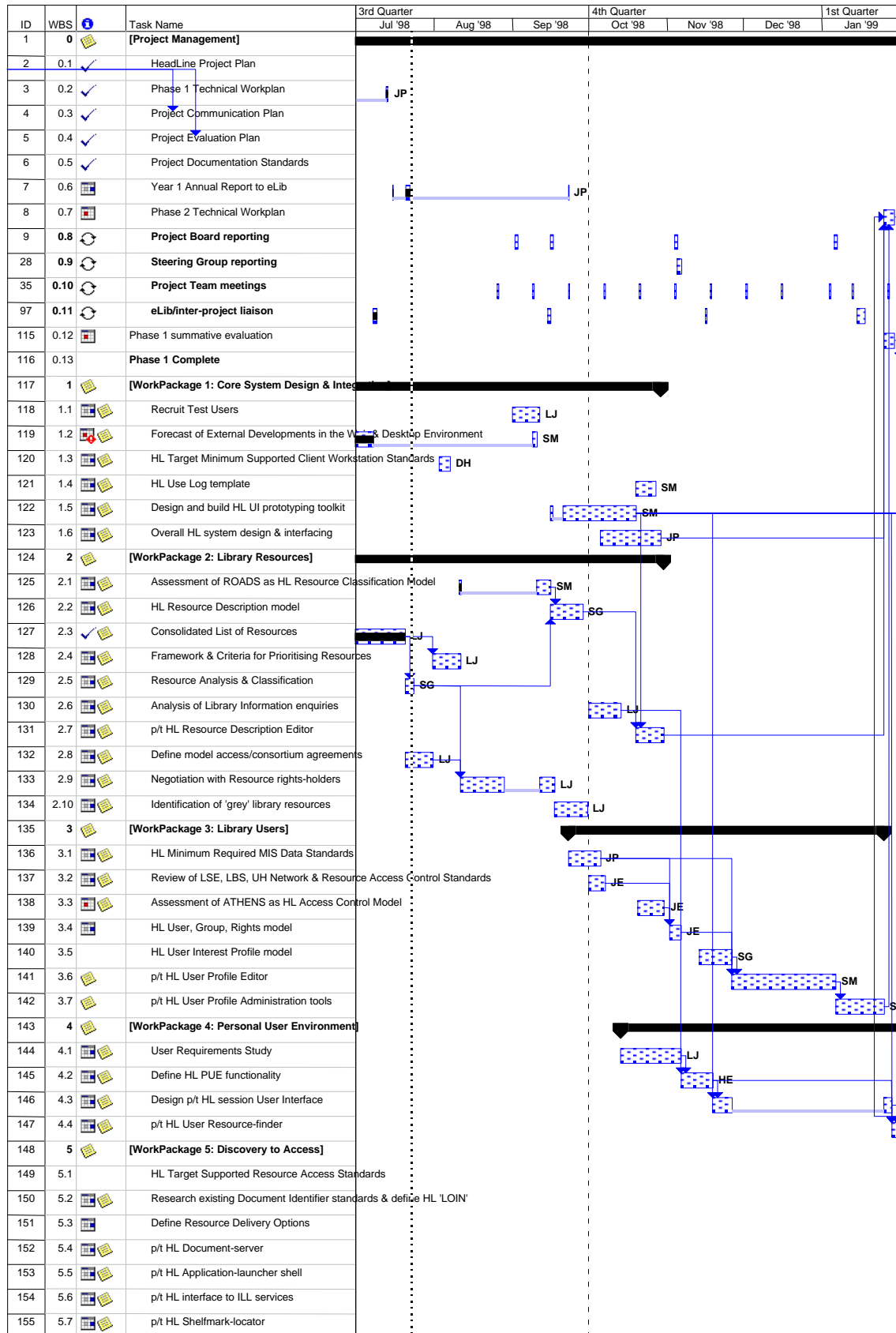
Due to the early stage in the timetable of the project at which this report is being made, it is not appropriate to report interim evaluation results.

Future development

It is anticipated that project Tasks as outlined in the Phase 1 Technical Workplan will be undertaken, towards the general goals for Phase 1 of the project which are described in the Project Plan.

Appendices

Outline of Phase 1 Workpackage/Task structure



Calendar of Dissemination Activities

| Date | Event | Name | Details | Status |
|-------------|-----------------|---|---|---------------|
| 1-Jan-98 | Journal Article | Ariadne | Maureen Wade wrote an article for Ariadne 13 (published January 1998) - this provides a general introduction to the project, with its aims, background, resources and key tasks. | Completed |
| 10-Mar-98 | Conference | eLib Concertation day | Concertation day with other eLib projects - Maureen Wade gave a presentation - general introduction to the project with background, aims and key features. Copy of the presentation is available on the team Website. | Completed |
| 25-Mar-98 | Conference | IRISS | IRISS stands for Internet Research and Information for Social Scientists, this conference was held at the University of Bristol. Heather Dawson (a librarian at BLPES) mentioned Headline at this as part of a talk on electronic resources at the BLPES. The conference may be repeated - perhaps in 2000 | Completed |
| 15-May-98 | Conference | MODELS7 workshop at Bath | MODELS7 'Models Information Architecture' was attended by Alan Robiette and Helen Edwards from HeadLine. Alan Robiette gave a presentation entitled 'Models and project HeadLine'. This provided an intro to HeadLine and how it relates to models. A copy of the presentation is on the team Website. | Completed |
| 21-May-98 | Conference | ROADS | Conference at Bristol - attended by Simon McLeish, Helen Edwards and Alan Robiette. Alan Robiette gave a talk on HeadLine (similar to the MODELS7 talk) | Completed |
| 9-Jun-98 | Seminar | Headline internal talk | General introduction to HeadLine project to library and IT staff at BLPES, with the aim of promoting the project and enlisting co-operation of library staff later in the project. The talk was given by Laura Johnson with a discussion afterwards; interest was shown in the user profiles aspects of the project. The presentation is available on the team Website. | Completed |
| 16-Jun-98 | Conference | WWW as an agent of change at Bradford | WWW as an agent of institutional change in higher education. This was attended by John Kirriemuir (of ROADS) who distributed 150 copies of HeadLine home-made flyer (general introduction to the project). | Completed |
| 22-Jun-98 | Seminar | British Council - Single User Interface | The British Council is working on a Single user interface project for its network of libraries and information centres overseas. Jorge Solis, Michaela Wilson and Tessa Bruce from the British Council visited the LSE and heard the general HeadLine presentation, followed by a discussion with | Completed |

| | | | | |
|-----------|------------------------|---|--|--|
| | | | the project manager, John Paschoud. | |
| 29-Jun-98 | Conference | UKOLN Information Landscapes for a Learning Society | UKOLN Conference - Information Landscapes for a Learning Society - Networking and the future of libraries 3 - held at the University of Bath This was attended by John Paschoud from HeadLine who distributed about 100 flyers and made contact with other projects, for future collaboration. | Completed |
| 1-Jul-98 | Website | HeadLine Website | The public Website went 'live' at www.headline.ac.uk in July 98 - previously it was held at http://www.lse.ac.uk/blpes/headline.shtml . The site has an introduction to the project, with contact details and other information, as well as a link to the home-made flyer. The URL is included on business cards and all correspondence. Later in the project it will be used to recruit and organise external users of the system. The Website is live but will be developed during the project | Completed but Website will be developed during project |
| 1-Jul-98 | Seminar | IGSS Summer School | Managing the Electronic Library at DILS, Aberystwyth - July-August 98. 20 flyers were sent for distribution. | Completed |
| 1-Jul-98 | Seminar | library schools | All UK library schools have been contacted with an offer to give a talk on HeadLine and/or some related issues (business information, user studies etc) to students at library schools, with the aim of publicising the project, raising awareness and promoting discussion in an academic environment, and possibly enlisting the help of a masters student in our evaluation activities by getting someone to base their dissertation on an analysis of the project. Letters and emails were sent in June - so far only Edinburgh has replied, expressing interest. | Contacted, awaiting response |
| | Promotional Literature | eLib official flyers | eLib flyers - printed by eLib. The flyers comprise Introduction, Description, Key Aims/Deliverables, Partners, Main contact details including URL and background to phase 3 projects. This has been finalised but we are awaiting printing. | Completed but awaiting copies |
| | Seminar material | HeadLine General Presentation | General introduction to HeadLine project on Powerpoint, available via the team Website. This can be downloaded and altered by any team member to suit a particular topic, or used 'off the shelf'. It provides an introduction to the project, background and relevant work within the partner sites. | Completed |

| | | | | |
|--|------------------------|------------------|---|-----------|
| | Promotional Literature | Home made flyers | Home made HeadLine flyers - this is a double sided A4 sheet with a general introduction to the project and contact details - these have been distributed at conferences etc. They are also available via the Website www.headline.ac.uk | Completed |
|--|------------------------|------------------|---|-----------|

Expenditure Summary

| | Anticipated | JISC funding | Actual | Variation |
|---------------------------|-----------------|-----------------|-----------------|-------------------|
| Staffing | £ 50,130 | | £ 34,512 | (£ 15,618) |
| Travel & subsistence | £ 1,166 | | £ 2,587 | £ 1,421 |
| Printing & publishing | £ 0 | | £ 1,410 | £ 1,410 |
| Seminar costs | £ 0 | | £ 0 | £ 0 |
| Recurrent subtotal | £ 51,297 | £ 58,797 | £ 38,509 | (£ 12,787) |
| Equipment | £ 7,000 | | £ 6,341 | (£ 659) |
| Software | £ 3,500 | | £ 0 | (£ 3,500) |
| Capital subtotal | £10,500 | £ 18,000 | £ 6,341 | (£ 4,159) |

Notes

The submitted Project Proposal that was accepted by JISC cast projected expenditure under the four recurrent and two capital headings listed, over the three (January - December) calendar years for which the project will run. JISC funding was approved on the basis of recasting this unequally into the four (August - July) JISC financial years over which the project spans, under just two aggregated budget heads for recurrent and capital funding, but totaling the same as the Proposal over the three-year period. This results in the project appearing to be over-funded in the early stages, but correspondingly under-funded in its' second and third years; it is therefore more prudent and informative to monitor actual expenditure against the Proposal profile than the funding profile used by JISC.

"Anticipated" expenditure in the table above has been calculated for the seven month period covered by this Annual Report as 7/12 pro-rata of the amounts under each budget head in the Project Proposal. "Variation" in the table above is between Actual and Anticipated expenditure, and shows aggregated underspends of both recurrent and capital funding.

The apparent underspend of capital funding is planned, so that technical decisions can be taken in the light of findings of the initial research Phase of the project. The outstanding balance is likely to be fully committed by the end of Phase 1 of the project.

The net underspend of recurrent funding is unplanned, and is largely due to delays in recruitment of suitable candidates to both of the Project Officer posts (at LSE and LBS). It is proposed that the outstanding available balance be carried forward, and used to fund some additional temporary staff time during the coding/testing stages of Tasks that have now been planned, which will be undertaken during the period November 1998 to June 1999. This will enable us to ameliorate knock-on effects of the delayed recruitment to the project.