



## Project Management

# Phase 1 Evaluation

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## Foreword by the Project Director

The HeadLine Project commenced in January 1998, as one of five Hybrid Libraries projects commissioned in Phase Three of the JISC eLib Programme. Members of the Project Team and Project Board, representing the three partner institutions, have worked together to develop detailed plans to achieve the broad and ambitious objectives which were proposed for the Project.

In summary, during Phase 1 the HeadLine Project has:

- Completed a comprehensive analysis of **Library Resources** and developed a sophisticated datamodel for resource metadata, building on previous work done in other eLib Programme projects and the wider information science community.
- Made progress in researching the requirements for a corresponding datamodel describing **Library Users**, but has discovered more complexity than at first anticipated in its practical implementation.
- Completed a significant study and analysis of **Library Information Service Enquiries** made by users, the publication of which has also provoked interest and contacts from institutions not previously connected with the HeadLine partnership or the eLib Programme.
- Produced detailed design documentation of our proposed functional **model of the Hybrid Library**, and working prototypes of some components of the model.
- Participated in an active and often leading role in joint activities undertaken by all or several of the projects funded by Phase Three of the eLib Programme.
- Promoted awareness of the aims, activities and achievements of the Project amongst library staff of the partner institutions, and the wider library community, and has preparations in place for timely dissemination to potential users of HeadLine services.
- Established effective mechanisms for management and decision-making, involving all stakeholders in the Project.

This review, at the conclusion of our first phase, analyses objectively and in detail each of the Workpackages and tasks that were planned, and the ways in which each has succeeded and failed. It also reaches conclusions which we will draw on in the planning and execution of the two subsequent phases of the Project and, we hope, in future development of our shared vision of 'the Hybrid Library' that will go beyond even the ambitious aims of the HeadLine Project.

*Maureen Wade, HeadLine Project Director  
Deputy Librarian,  
British Library of Political & Economic Science,  
London School of Economics*

## Introduction

The aim of this document is the summative evaluation of Phase 1 of the HeadLine Project, to look at the proposed achievements for the end of this phase and how far these objectives have been met. This document will review all the tasks planned for this Phase of the Project, and will log all the dissemination achievements from this period.

## *Aims*

The evaluation of Phase 1 seeks to review the first phase of the project, measure how far it has met its aims and to appraise the outcomes and impact of this first phase. The first Phase of HeadLine ran from January 1998 until February 1999.

## *Methodology*

To review the first phase of the project, five documents have been used.

Firstly the **Evaluation Plan** (HL-1998-05) which outlines all evaluation activities and specifically for Phase 1, the formative evaluation tasks to define the system requirements for HeadLine.

Secondly the **Project Plan** (HL-1998-02) was examined to identify what the project aimed to achieve by the end of the first year.

The jobs outlined in the Project Plan were clarified and broken down into Workpackages and Tasks by the **Technical Workplan** (HL-1998-03). This became the timetable and workplan for all Phase 1 activities, so this document was used to measure the achievements of this period.

In addition to this, the **Project Milestones**, listed by the CEI in HeadLine's funding letter were considered and the project's progress in relation to these monitored.

Finally the **Communications Plan** (HL-1998-04) was reviewed to assess dissemination activities for this phase of the project

## **Management, Organisation & Communications**

A Project Steering Committee and a Project Board have been established, as scheduled in the Project Plan. In addition, structures and routines have been established to facilitate day-to-day communication and inter-working between active members of the Project Team, allowing for the circumstances that contributing staff are based at different institutions and sites, and that some roles in the Project are fulfilled as proportions of full-time responsibilities of specific individuals.

The HeadLine Project has also participated in various activities in common with other projects in the eLib Phase 3 Programme.

### ***Steering Committee***

The Steering Committee represents academics from partner institutions, and from the information sector, as well as representatives from vendors and information providers. During Phase 1 of the project there have been two Steering Committee meetings, both of which have proved very useful to the project, in terms of advice and expert help in key areas.

#### **Steering Committee Meetings**

11 May 1998 - Introduction to project, with aims and plan of work, also discussion of dissemination.

14 December 1998 - Dissemination achievements and strategy, project progress and model licence.

Margaret Coutts of the University of Kent at Canterbury has been Chair of the Steering Committee since its inauguration, and has contributed a great deal of time and useful advice to the project in this role. Due to staff changes at the LBS and LSE two new members have been recruited onto the Steering Committee. These new members have been briefed about the project, and will join the next meeting which is scheduled for 6<sup>th</sup> May 1999. The project aims to recruit additional academic representatives from the three partner sites for the Second Phase of the project when we will need support from academics within partner institutions to help recruit test users and to promote the system to their students.

#### **Membership of the Steering Committee**

Ms Margaret Coutts (Chair), University Librarian, University of Kent at Canterbury

Dr Colin Harris, University Librarian, Manchester Metropolitan University and JISC/CEI representative

Professor Danny Quah, LSE

Dr Jeff Sampler, LBS

Dr Mike Herman, University of Hertfordshire

Mr Albert Prior, Publisher Relations Manager, Swets & Zeitlinger

Mr Peter Gethin, Managing Director, SIRSI UK Ltd

Ms Jenny Walker, Silver Platter

Ms Di Martin, Director of LIS, University of Hertfordshire

Ms Maureen Wade, Deputy Librarian, LSE

Mr Alan Robiette, Director of Information Systems Division, LBS (until June 1998)

Ms Helen Edwards, Head of Library, LBS (from June 1998)

Ms Jan Wilkinson, Deputy Librarian, LSE (until June 1998)

### ***Project Board***

The Project Board comprises a senior staff member who plays a key role in library strategy from each of the three partner institutions, and the Project Manager. The role of the Board is to advise

the team and direct the project at a strategic level, as well as matching project aims with institutional policies and developments. The Project Board is chaired by the Project Director.

The Project Board has met approximately every two months, with meeting venues normally rotated between the sites of the three partners. Communication is also maintained amongst this group via the project board mailing list (hosted on Mailbase). Agendas, minutes and other formal reports to and of Project Board meetings are routinely copied to the Chair of the Project Steering Committee, and to the eLib Programme representative member of the Steering Committee.

### **Project Board Meetings during Phase 1**

- 25 February 1998, LBS Library
- 18 & 19 March 1998, Brighton (Project Planning with Team)
- 24 April 1998, UH St Albans Library
- 17 June 1998, LSE Library
- 23 September 1998, LBS Library
- 19 November 1998, UH St Albans Library
- 14 January 1999, LSE Library
- 25 February 1999, LBS Library

### ***Project Team***

All the staff employed by or involved in HeadLine are members of the project team and communication is maintained between team members by a mailing list (hosted on Mailbase). Fortnightly team meetings are usually only attended by members from the LSE and LBS and only those members who are involved in work that is under discussion at each meeting. These meetings cover practical aspects of work in progress.

### ***Project Management Activities***

All the project management documents for phase1 have been completed or are underway and are listed below. Most of these documents are available on the Public Website: <http://www.headline.ac.uk>.

Project management tasks have all been completed according to plan, the Technical Workplan in particular proved helpful in day-to-day administration of project jobs and deadlines. This gave a summary of each task together with the output and who was responsible for it, so that it was clear to see which team member was doing which task at a particular time. This plan also showed relationships between tasks, and so made it easy to see how one job fed into another. Finally the format of this plan made rescheduling fairly easy, as jobs could be put back or forward according to progress made.

Other plans, such as the Communications Plan and Evaluation Plan were useful reference documents to guide dissemination and evaluation activities, and to monitor work against what the project aimed to do. The Document Standards working paper is used by team members when writing reports or producing dissemination material, and this has been supplemented by a series of pages on the Team Website, showing how to create new documents with downloadable templates. Other reports and summaries have proved invaluable when producing dissemination material.

#### **0.1 Project Plan**

This report provides detailed project information and outline timetable of tasks; this is available on the public Website.

#### **0.2 Phase 1 Technical Workplan**

This document defines tasks, deliverables and responsibilities for Phase 1 of the HeadLine project, together with deadlines and staff responsible for each task. It was submitted to eLib, and distributed internally.

**0.3 Communications Plan**

The Communications Plan outlines dissemination activities planned throughout the project's lifespan and is available on the public Website.

**0.4 Evaluation Plan**

This comprises the strategy for obtaining feedback on the HeadLine system as well as overall project evaluation; it is available on the public Website

**0.5 Project Documentation Standards**

This working paper defines the standards for all documents produced during the course of the project, in particular, document templates for reports, working papers and dissemination material, as well as graphics. This document has been distributed internally.

**0.6 First Year Annual Report**

This was submitted to eLib in July 1998 - to correspond with their timetable, and so does not have all the work from the first year of the project, it is available on the public Website.

**0.7 Phase 2 Technical Workplan**

This document is currently being prepared.

***Liaison with related projects***

The majority of activities that have been formally undertaken in common with other eLib Programme Phase 3 projects are formally detailed (in Appendix A) as Dissemination activities. The HeadLine Project and HeadLine Project staff have played leading or co-ordinating roles in several joint activities to date.

It is also relevant to note that good working relationships have been established in other respects with other eLib projects and JISC services, and with many individuals and institutions in Britain, Europe and other parts of the World with an interest or involvement in common with HeadLine.

## Research & Development Activities

During the first phase the project has made significant progress in the areas of Users, Resources, and System Design. This section provides a review of the first phase of the project, evaluated against the Project Plan (HL-1998-02) and Technical Workplan (HL-1998-03).

The Project Plan described the first phase of the project in terms in analysis and prototyping, i.e.:

- Definition of requirements
- Parallel development of prototype components of the hybrid library
- Establishment of user panel and other evaluation mechanisms
- Project review and detailed plan for phase 2

The Technical Workplan clarifies and adds detail and quantification to the 'Detailed Project Timetable' from the Project Plan. Tasks proposed were organised into four Workpackages (plus project management 'overhead' activities, grouped into the following areas:

1. Core system design and integration
2. Library Resources
3. Library Users
4. Personalised User Environment
5. Discovery-to-Access Tools

Progress in each Workpackage is detailed below, with Task titles and reference numbers (where appropriate) shown in bold, for ease of reference against their definitions in the Technical Workplan document and the maintained working version of the Workplan that is maintained using a project planning software tool.

### ***Workpackage 1 - Core System Design and Integration***

This Workpackage has produced tools which can be used later in the project (for instance the Use Log Template and User Interface Prototyping toolkit) and has also focused on background research, analysing the environment in which HeadLine services will be provided. Again this work will be vital later in the project, to ensure that what is built will be compatible with environments at partner sites and externally. This Workpackage has progressed as scheduled (although some tasks took slightly longer than expected) and all deliverables produced are housed on the Workpackage 1 area on the Team Website.

#### **Recruit Test Users**

This task has been deferred to Phase 2 of the project, so that users will be recruited when there is a system implemented for them to test and respond to.

#### **1.2 Forecast of External Developments in the Web**

A survey of developments that we might expect during the project's lifetime has been completed. This working paper discusses WWW servers, browsers and the desktop, network computing, Java and WWW programming. It has been published internally.

#### **1.3 Target Minimum Supported Client Workstation Standards**

All resources from the Prioritised Resource list (i.e. those which may be incorporated into the system) have been surveyed for their technical requirements - in order to gauge the minimum standard for workstations to access most resources that the system may offer. IT standards at each site have also been surveyed for this task, to define the minimum workstation hardware/software configuration, that must be supported by the HL system/service.

#### **1.4 Use Log Template**

A model has been developed for logging, and prototype software has been developed to view data via WWW browser from a sample set of logs. This task involved examination of the logging strategies of other library projects. The working paper has been distributed internally.

### **1.5 Design and Build HL UI prototyping Toolkit**

A simple Web CGI program has been created for use in testing, demonstration and user evaluation of Web/http based user interface components. This task aimed to entail minimum coding effort, and to make use as far as possible of existing available tools or components (e.g. Java kits, libwww for Perl). The task also includes documentation of the UI testing toolkit, so that it can be used to generate/test UI prototypes with minimum effort/learning. The documentation and test urls for this are available on the Team Website.

### **1.6 Overall system design and interfacing**

The project team are currently finalising the design of the HeadLine Personalised User Environment (or PUE) which determines the overall design of the HeadLine system and what features this will have. This may be subject to some modification during Phase 2, due to technical issues, or user reactions to the system, but the first version of this design will provide the basis for development work in Phase 2.

## ***Workpackage 2 - Library Resources***

The majority of work during the first Phase has been centred around resources. All resources available electronically at the three partner sites have been analysed, ranked for inclusion in the system and listed centrally. These lists are updated as resource portfolios change at partner sites, and non-traditional resources have been incorporated into these which may be of use to users at partner sites, for instance course materials and working papers.

Significant development work has been done with the ROADS database to access resources and the HeadLine Resource Finder, a searchable resource database combining records from the LBS and LSE, has been tested and demonstrated externally. This resource finder has to fit with the project's Resource Description Model (RDM) which determines how information about resources is recorded for effective use and retrieval of relevant materials. The team are also considering an alternative system to ROADS if it does not meet the requirements of the RDM

Analysis of Information Desk Enquiries identified common enquiries received at all partner sites which the system could potentially answer and these results were confirmed by the Staff Consultation Event. In summary the Resources tasks have gone more or less according to plan, but some tasks have involved more work than was anticipated or have provided technical problems for the Project Team.

### **2.1 Assessment of ROADS**

The ROADS resource description schema has been evaluated for its suitability for classifying resources and services in HeadLine. Alternatives to ROADS, such as RDF, are also being considered, and ROADS is being used as a test database of real resources from two partner sites, this is provisionally called the HeadLine Resource Finder (HRF). The ROADS documentation and test engines are available internally.

### **2.2 Resource Description Model**

The Resource Description Model (RDM) is in process and currently under discussion by the HeadLine team. The aim of this task is to create a resource description schema to be used for description for library resources accessible via the HL system which will cover description of resource content and access allowed to a resource by different classes of end-users. The third draft of this document is on the team Website and is currently under discussion by the project team.

### **2.3 Consolidated List of Resources**

This comprises a list of subject-relevant library resources at all partner sites, for consideration for possible inclusion within the HL system/service at some stage in the project. The list covers all resources that are relevant to economics and business studies and that can be referenced electronically. This list was also updated to include 'grey' resources from the later task, and the compendium has been distributed internally.

## **2.4 Framework and Criteria for Prioritising Resources**

The resources from the previous task were prioritised for inclusion on the HeadLine system. Criteria for prioritisation included popularity, ease of access and technical compatibility, and resources were ranked according to these criteria in consultation with librarians and IT staff at partner sites. The consolidated list of resources has been distributed internally and is continuously updated; it is used for other resource tasks, and the items highest up the list have been among the first added to the test system.

## **2.5 Resource Analysis & Classification**

The HeadLine resource description schema was used to compile a working prototype database of resources from the prioritised list of library resources. This database (based on ROADS) is currently being tested and is available internally.

## **2.6 Analysis of Library Information Enquiries**

A survey was made of information desk enquiries at the three partner sites, during Autumn Term, 1998. Information was collected on the nature and subject of enquiries made by end-users of library information desks at each partner site. Observations were made by the same person, for the same length of time, to ensure comparable results were obtained; and busy periods were studied to maximise results.

The results have been analysed, to produce a quantitative analysis (differentiated by site), including estimates of staff time spent on dealing with enquiries that could be answered by the HeadLine system. Although enquiries vary between sites (due to differing library environments, student populations and available resources) some common queries emerged - particularly in requests for grey literature and locating journal holdings. The report is available on the public Website.

### **Staff consultation Event**

The purpose of this exercise was to test the results of the Information Desk Enquiries Research and gain an insight into staff views of user needs and how HeadLine could help users.

The results from this event were appended to the Information Desk enquiries document, and a 2 page summary was also distributed; this summary, entitled 'What do users want from HeadLine' will feed into the design of the Personalised User Environment in Phase 2. This summary is also available on the Public Website.

## **2.7 HL Resource Description Editor**

This task aims to design and prototype software for an administrative user of HeadLine (i.e. a staff librarian) to create, view or modify Resource Description Profiles. This is being developed concurrently with the earlier resource tasks.

## **2.8 Define Model Access/Consortium Agreements**

This aim of this task was to define an appropriate model for licensing the use of library resources via the HeadLine system. This took into account the objective of sharing use of some resources between partner sites, and providing off-campus access to resources with appropriate security measures.

A document and model licence (based on the NESLI agreement) have been produced and accepted by the project team and librarians at partner sites. The main issues for defining a model licence were discussed at the Steering Committee Meeting in December 1998, to take advantage of the combination of information providers and users who make up the Steering Committee. This discussion gained insight into what information providers and information users want from the licence. Output from this meeting was fed back into the Model Licence which has now been adopted and is available on the Public Website. This licence is useful in the successive task, 'Negotiation with Rights Holders', when approaching rights holders as a basis for negotiating access to resources; the licence can also be used as a benchmark when examining licences offered to partner sites by vendors.

## **2.9 Negotiation with Resource Rights holders**

This is an ongoing task, throughout the project's lifetime. The project has embarked on some discussion with information providers, which has been led by the Project Director, Maureen Wade. Negotiation is also being co-ordinated with other eLib Phase 3 projects where possible with common suppliers.

## **2.10 Identification of Grey Library Resources**

A study has been made of all subject relevant 'non traditional' information resources that could be included in access via the HeadLine system, for instance 'grey' literature produced within partner institutions, course-specific information (such as reading lists). These have been identified and added to the consolidated list of resources. There is also a working paper for this task, which has been distributed internally. This task is ongoing so that when new 'grey' resources are discovered or added at partner sites, they are included in our resource compendium.

## ***Workpackage 3 - Library Users***

The main challenge for the project in this Workpackage lies in HeadLine's reliance on external factors, for instance institutional peculiarities in Management Information Systems at each partner site have made it difficult to access and analyse the MIS data. Authentication issues are often affected by which authentication methods are used by information providers and also the level of take-up of ATHENS. Significant progress has been made in this Workpackage though, which will be continued as the project progresses.

### **3.1 Minimum Required Management Information System (MIS) data standards**

There is no problem identifying what HeadLine's requirements are for this task, but considerable problems with getting data out of the MIS systems at partner sites, due to technical difficulties, institutional problems and the sensitive nature of this data. This task is currently in progress.

### **3.2 Review of LSE, LBS and UH Network and Resource Access Control mechanisms**

This task is also in progress and aims to assess the current library and institutional policies and mechanisms for network security and control of access to 'restricted' library resources prevailing at the three partner institutions and likely local developments in this field in the near future. Library staff were consulted about this area, during the Staff Consultation Event and their responses are being worked into the document which will be available shortly.

### **3.3 Assessment of ATHENS as HeadLine's access control model**

Significant work has been done reviewing ATHENS and analysing HeadLine's authentication needs and Jonathan Eaton has given several papers and articles on the subject. The final documentation will be available shortly, after the eLib concertation day (10<sup>th</sup> March 99).

## ***Workpackage 4 - Personalised User Environment***

Although a formal user study has not been undertaken in Phase 1, considerable progress has been made in gaining an understanding of what users want from the system, firstly by looking at what they already ask for and secondly by consultation with staff, to assess desired patterns of working and features of HeadLine which would be useful. Actual user consultation will be undertaken in the second phase of the project, when there is a test system for them to react to. PUE development has been a beneficial process, which has involved input from all team members (led by Helen Edwards) and most discussion has taken place during Team Meetings. This discussion has been assisted by visual aids, such as dummy webpages, and it has been useful to begin to visualise and consider how the various tools and features will interact to provide a service to users.

### **4.1 User requirements study**

This task has been fulfilled by the Staff consultation event, which was a way of determining what users want from the system and desired patterns of study etc. Preliminary research showed that there would be little value in asking users for their preferences without a system for them to see, so a more valid approach would be to ask librarians what users want, based on what they ask for and perceptions of need. This followed on naturally from the Analysis of Information Desk Enquiries as the results from this exercise gave staff a starting point for expressing their views.

The report of this event was appended to the Information Desk Enquiries document, (Task 2.6) and a 2 page summary was also distributed, this summary, entitled 'What do users want from HeadLine' will feed into the design of the Personalised User Environment in Phase 2. Later in the project 'real' users will be approached for their opinions of the system.

#### **4.2 Define PUE Functionality**

The aim of this task is to specify the functions to be performed by the HeadLine Personalised User Environment (PUE). This will include the way in which user profiles will be matched against resource descriptions and the extent to which session-based searches will be managed within the HL system. This specification should avoid any assumptions of the user interface. This task is underway and various models for the PUE are under discussion and mounted on the Team Website. The PUE will be finalised by the end of April 99.

#### ***Workpackage 5 - Discovery-to-Access Tools***

This Workpackage does not fall into Phase 1 - however significant progress has been made on task **5.7 Shelfmark Locator**, which is being developed and Beta-tested at the time of writing.

## Dissemination Activities

The following dissemination activities were scheduled for the first phase of the project, items in **bold type** are extracted from the Communications Plan (i.e. communication aims) and the plain text underneath is a description of HeadLine's progress in these areas.

### Phase 1 (1998) – Analysis and Prototyping

**During this phase, dissemination will be restricted somewhat as there will be no product or results to communicate. Dissemination will still be useful and necessary and will fall into the following areas:**

- **General awareness - publicising the project within partner sites and academic and library community via the use of Website, discussion lists, press releases and articles, literature, participation in conferences (where appropriate) - and with the use of branding in all publications.**

The Website has been used to disseminate material to all interested parties and the url ([www.headline.ac.uk](http://www.headline.ac.uk)) is included on all project correspondence, email, presentations and literature. Branding has been achieved and made consistent by the use of the new HeadLine logo which appears on all letter paper, webpages, presentation etc, and the use of project stationery and business cards. Articles on HeadLine and related topics have been published in several journals throughout the first phase, and these are listed in the Appendix to this document.

- **Contribution to debate - by participating in discussion lists, conferences etc, the project team can communicate the outline of the project and its aims, even though it is unlikely that there will be any deliverable conclusions at this stage.**

Team members have contributed to relevant discussion via membership of mailing lists in various areas, and have also participated in conferences and seminars. Several papers have been given by team members on various topics (authentication, collection development) as well as general presentations about the project which have been made to staff in partner sites, visitors, other projects etc.

- **Year 1 Annual Report, Year 2 technical workplan - publication of these reports at the end of the first phase.**

All published documents are made available freely to the public via the Website; the Annual Report and an outline of the technical workplan for Phase 2 will be accessible from here.

### *Dissemination Achievements*

A list of dissemination achievements for the first phase is appended to this report.

## Evaluation against CEI Milestones

The points in **bold type** are the milestones and the normal text underneath describes the progress of these.

**3 months**      **Detailed project plan (WP)**  
**Steering Committee established**  
**Evaluation Plan completed (WP)**

The project plan and Evaluation plan have been published on the team Website and submitted to eLib.

The Steering committee has been established and has met twice in the first phase. The Steering committee meetings have provided useful guidance for the project, and expert help for instance in the area of licensing resources.

**6 months**      **User profile design (WP)**  
**Establish Web presence**

The user profile work falls into Workpackage 3 and has commenced during Phase 1, however it has not been completed, because the distribution of tasks in the first phase concentrated rather on Resources than users. Also the work involving MIS data has taken longer than anticipated due to institutional circumstances, so this milestone will be passed during the Second Phase of the project.

A Web presence has been successfully established. The project uses 3 sites for communication and dissemination:

- The Team site is used to hold documents for all team members to access, as well as links to useful resources and news for the team (this is a password protected site).
- The Public site holds all published documents, as well as details about the project, and team, and contact information. The public site will be used later in the project to provide guest access to the HeadLine system and will also hold a library of dissemination material.
- The Secret site (not password protected but a secret url) is used to hold information that may be used by people outside the team, , for instance staff at partner sites, but not made available to the public. This site has been used extensively to provide documents for Steering Committee members to access.

**8 months**      **Resource compendium design (WP)**

The resource compendium has been completed and holds listings for all potential resources for the HeadLine service from all 3 partner sites. The resources have been prioritised for inclusion with technical requirements and vendor information for each one. A sample set of resources have been imported into a test HeadLine ROADS database which is currently being evaluated by the project team.

**12 months**      **Resource presentation and service environment prototype (GA)**  
**Year 2 technical plan (WP)**  
**Evaluation of phase 1**

The resource presentation and service environment prototype is currently underway; the ROADS database has proved quite difficult to implement so the team are currently considering an alternative system based on the Resource Description model. The database has been tested in partner sites and guest access (to this or the alternative prototype) will be available soon.

The year 2 Technical Plan is now subsumed into further development of the Technical Workplan for Phase 2, which is currently in progress. The Evaluation of phase 1 has been completed with the production of this report.

## Conclusions

In the Project Plan we set ourselves ambitious goals to research possible solutions to a number of challenging problems, which will need to be solved to determine the requirements for implementation of 'the hybrid library'. We have achieved the majority of those goals, and even though we have found a few to be more difficult than we anticipated, we have made significant progress with them, and documented our findings in ways that should benefit not only the subsequent phases of the HeadLine Project, but also other projects and development work in this field.

Our investigation of relevant Library Resources and the resulting datamodel we are developing for resource metadata, whilst building on previous work by other eLib Programme projects, has led us to the conclusion that previously accepted models may not be entirely sufficient, particularly for dealing with resources that are available through more than one method of electronic access or delivery, under complex sets of licence conditions.

We have made significant progress in researching the requirements for a corresponding datamodel describing Library Users, but have discovered more complexity than at first anticipated in its practical implementation. Our assumptions were optimistic about institutional organisation and management regarding MIS, with regard to the availability of independently-maintained data about users. Achieving longer-term Project objectives of creating a user environment that can adapt according to attributes of the user is absolutely dependent on such data, and so we are exploring alternative ways in which we can take the initiative to establish such a directory of library users, with due regard for issues such as privacy of personal data.

Our analysis of Library Information Service Enquiries has quantified some of the anecdotally-based assumptions about "what users ask for", and has also revealed information about their information-seeking behaviour that does not seem to have been covered by previous studies. Publication of the results of this work has provoked interest and contacts from institutions not previously connected with the HeadLine partnership or the eLib Programme.

The staff involved in HeadLine have participated in a wide variety of activities undertaken collectively by projects funded under Phase Three of the eLib Programme, in several instances taking on the responsibility of leading or co-ordinating major joint initiatives.

We have met or exceeded the targets that we set ourselves in the Dissemination Plan, promoting awareness of the aims, activities and achievements of the Project amongst library staff of the partner institutions, and the wider library community, and we have preparations in place for timely dissemination to potential users of HeadLine services.

## Future development

The original (Project Plan) objectives for Phase 2 of the HeadLine Project were stated as:

### **Synthesis of hybrid library working model (stage 1)**

- production of the resource compendium database in line with user specification
- population of the resource compendium with library resources (all sites)
- consolidation of hybrid library components so far developed into working model
- implementation of working model at institutional sites

### **Deployment of working model in institutions**

- testing of the model by library staff (management and information provision) and users (teaching, learning and research)
- development of the information content, especially from the perspective of subject librarians and teaching staff
- enhancements to the resource base; investigation of including resources not traditionally managed by the library such as software or computerised teaching materials in the resource compendium

### **Deliverables**

- multi-perspective evaluation of the hybrid library working model

### **Development of feedback mechanisms**

- development of methodology for tracking resource use
- investigation of the use of qualitative feedback measures (on-line dialogue, evaluation forms etc.)
- implementation of individual configuration of resource presentation based on user preference/behaviour
- investigation of proactive alerting strategy based on user behaviour

### **Deliverables**

- prototype feedback component

### **Enhancement of service environment**

- ongoing development from Phase 1

In essence, we have found no reasons to amend these objectives and deliverables, supplemented by a continuation of work started in Phase 1 on the issues (particularly those concerning user metadata) in which we have found ourselves breaking new ground.

Phase 2 of the Project will be planned in detail to span the period March 1999 to March 2000, allowing for one (possibly two) public releases of an integrated HeadLine Personal User Environment to users in the partner institutions. These will be preceded by public availability of non-integrated components (such as cross-media collection-level search gateways and 'discovery-to-access' tools) as these are developed. Completion of Phase 2 will allow Project staff resources in Phase 3 (April 2000 to December 2000) to focus on studying changes in user behaviour, and refinements to our datamodel, software tools and supporting databases.

In terms of specific risk analysis for Phase 2, the move of the LSE Library to temporary accommodation (due between June and September 1999) is likely to have some effect on the Project, but that this should not require any further reconsideration of scheduling. Similarly UH are due to implement a new library system over the same time period which may take up staff time and affect resources.

We would expect to continue to be involved in dissemination activities and collaboration with related projects at a similar level, during Phase 2, to that established in Phase 1.

## Appendix 1 - Phase 1 Dissemination Achievements

Date	Event	Name	Details
1-Jan-98	Journal	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. <a href="http://www.ariadne.ac.uk/issue13/">http://www.ariadne.ac.uk/issue13/</a>
10-Mar-98	Conference	ELib Concertation days	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.
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
15-May-98	Conference	MODELS7	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 introduction to HeadLine and how it relates to MODELS. A copy of the presentation is on the team Website.
21-May-98	Meeting	ROADS	Meeting with ROADS at Bristol - attended by Simon McLeish, Helen Edwards and Alan Robiette. Alan Robiette gave a talk on HeadLine (similar to the MODELS7 talk)
1-Jun-98	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 <a href="http://www.headline.ac.uk">www.headline.ac.uk</a>
1-Jun-98	Talk	HeadLine General Presentation	General introduction to the 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.
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.
16-Jun-98	Conference	WWW as an agent of change	WWW as an agent of institutional change in higher education. This was attended by John Kerrimuir (of ROADS) who distributed 150 copies of the HeadLine home-made flyer (general introduction to the project).
Date	Event	Name	Details

22-Jun-98	Meeting	British Council - Single User Interface	The BC is working on a Single user interface project for its network of libraries and information centres overseas. The network is both a valuable resource to users in the countries in which we operate, and a showcase of British expertise in the provision of information services. 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 the project manager, John Paschoud.
24-Jun-98	Meeting	Maureen Wade meeting with Daniel Smithson about Hybrid Libraries	Daniel Smithson is researching the hybrid library and came to discuss some hybrid library issues with Maureen Wade , in particular, he wished to discuss a model of the nature and function of the hybrid library that he has developed, to get reactions to that model."  Maureen Wade and John Paschoud attended the meeting.
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 and Maureen Wade from HeadLine who distributed about 100 flyers and made contact with other projects, for future collaboration.
1-Jul-98	Website	HeadLine Website	The public Website went 'live' at <a href="http://www.headline.ac.uk">www.headline.ac.uk</a> in July 98 - previously it was held at <a href="http://www.lse.ac.uk/blpes/headline.shtml">http://www.lse.ac.uk/blpes/headline.shtml</a> .  The site has an introduction to the project, documents, contact details and 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 a group of users of the system
1-Jul-98	Literature	eLib official flyers	eLib flyers. The flyers comprise introduction, description, key aims and deliverables, partners, main contact details including URL and a background to phase 3 projects. These have been delivered together with prices for printing more copies.
1-Jul-98	Seminar	IGSS Summer School	International Graduate Summer School - Managing the Electronic Library at DILS, Aberystwyth - July-August 98. 20 flyers were sent for distribution.
28-Jul-98	Journal	D-Lib	Online journal - joint hybrid libraries article, "Realising the hybrid library". Each project to produce a short summary of their activities for the introductory session, then a longer section (up to 1000 words) on key issues emerging from their project and how they intend to deal with them. Jonathan Eaton wrote an article about HeadLine.
12-Aug-98	Talk	Headline talk to Southampton University Visitors	General introduction to HeadLine project to visitors from Southampton university library, together with Decomate and M25 Link. The general presentation was used but reduced considerably to fit into a 10 minute slot and was limited to a general project description, rather than technical issues.

Date	Event	Name	Details
24-Aug-98	Journal	Vine	<p>Authors were invited to submit short papers (2000-3000 words) on any aspect of the provision of secure networked access to electronic information sources by European libraries and information services.</p> <p>John Paschoud submitted the article in August, "An Open (and 'freeware') standard for secure Internet document access"  <a href="http://www.sbu.ac.uk/litc/publications/vine.html">http://www.sbu.ac.uk/litc/publications/vine.html</a></p>
25-Aug-98	Conference	Culture, Learning and the Digital Future	<p>Culture, Learning and the Digital Future</p> <p>A One-day Seminar at Edinburgh -25/26 August 1998 (lunchtime to lunchtime)</p> <p>How information and communication technology are taking an increasingly central role in the support of formal schooling, lifelong learning and education in its widest sense, cultural institutions are being encouraged to create digital content for the new learning infrastructures.</p> <p>60 flyers were sent for distribution - and they also offered to mail out flyers to a longer list for a small fee (£25) - this was not used, but worth bearing in mind for the future.</p>
27-Aug-98	Meeting	Visit from Gaynor Austen	<p>Gaynor Austen (Director of Library Services from Queensland University of Technology) visited for an introduction to HeadLine.</p> <p>John Paschoud had a meeting with her, and spoke about headline and technical aspects</p>
1-Sep-98	Conference	The future for Electronic Reserves	<p>One day event at Templeton college where the on-demand related projects feed their major results back to the publishers and interested librarians. Idea is to focus on the various software components that resulted and provide a platform for demonstrating our successes with copyright management systems - with live demonstrations.</p> <p>Laura Johnson attended - not really dissemination as no opportunity to distribute flyers.</p>
7-Sep-98	visit	Visit from Finnish 'eLib' projects	<p>A group of Finnish 'eLib' projects visited the BLPES for a short overview of the projects hosted at the LSE. They are members of the steering group of National Electronic Library-programme, who are launching a development project this year to create a prototype of graphical user interface. They are aiming to provide single search access to various types of information resources: OPACS, ref. dbase, subject gateways etc.</p> <p>John Paschoud attended and gave a short overview of the project, and discussion of difficulties/obstacles etc.</p>
14-Sep-98	visit	Visit from Copenhagen Business School	<p>A group of staff from the Copenhagen Business School library visited and amongst other things wanted to know about projects/new developments. John Paschoud attended this meeting and talked about HeadLine - didn't use a presentation but a more informal introduction and chat about the project.</p>

Date	Event	Name	Details
15-Sep-98	workshop	Institutional Web Managers workshop	<p>Brian Kelly ran, in conjunction with Netskills, a workshop for institutional web managers at Newcastle University from 15-17 September. As well as presentations and discussion groups hosted a poster display, and thinks it would be a useful opportunity for eLib projects to disseminate information to institutional web managers.</p> <p>BK decided that a speaker from HeadLine would probably not be appropriate as the workshop is intended for institutional web managers, so 100 flyers were sent for display.</p>
15-Oct-98	Collaboration	Leeds conference	Leeds hosted a regional event with a joint presentation by Hybrids projects, on 15th Oct 98. Jonathan Eaton attended and gave a talk on authentication
15-Oct-98	Meeting	Visit by German projects	<p>German projects are visiting the UK and meeting eLib on the 16th Oct. On the 15th they visited HeadLine and M25link at the LSE. 5 visitors came - from German libraries and library projects, and were given a general introduction to the projects followed by a discussion, JP came to answer their technical questions.</p> <p>Their Website is at <a href="http://www.ub.uni-bielefeld.de/digibib-nrw/">http://www.ub.uni-bielefeld.de/digibib-nrw/</a></p>
26-Oct-98	Talk	University of London Libraries Committee	This was held at the LSE and John Paschoud gave a short HeadLine presentation. It was a 10 minute, non-technical presentation, describing the aims for the users etc.
5-Nov-98	Talk	Visit to QMC, Edinburgh (library school)	<p>Laura Johnson was invited by Hazel Hall (H.Hall@mail.qmced.ac.uk) to come on the 5th November 1.15 - 2.15 for a lecture on headline from an electronic collection development perspective.</p> <p>Gave a talk on HeadLine and electronic collection development which is available on the team Website, it all seemed to go quite well.</p>
23-Nov-98	Talk	Visit by ALISS librarians	A number of members of ALISS academic Librarians in the social sciences will be coming for a meeting at the LSE and Heather Dawson organised a few short presentations before the meeting. A short talk on HeadLine was given to them.
25-Nov-98	Talk	Aslib Computer group	Jonathan Eaton gave a talk on HEADLINE (issues of controlling access and authentication in integrating traditional and electronic services). Other hybrid projects also spoke about their projects and related issues.
15-Dec-98	Talk	Hylife Conference	Jonathan Eaton gave a talk on HEADLINE: 'Making the Gateway Secure and Invisible'. Other hybrid projects also spoke about their projects and related issues.

Date	Event	Name	Details
19-Jan-99	Talk	M25 Consortium	This comprised a brief introduction to the project, with some new slides concerning progress to date and our plans for the 2nd phase (due to begin in March 99). The presentation also included a demo of the HRF - slides area available on the Team Website. The presentation went quite well and there were several questions, about MIS data, the Personalised user environment etc.
1-Jan-99	Journal	RELAY	Stephen Graham wrote an article for RELAY, the journal of the University College and Research Group of the LA, entitled, 'Resource Description in HeadLine'
1-Jan-99	Journal	NRAL	Jonathan Eaton wrote an article for the New Review of Academic Librarianship - this was in conjunction with other eLib projects, and was based around the presentation at the Hylife conference
3-Mar-99	Talk	Loughborough Library School	The focus of the talk was the hybrid library (to fit into their 'digital library' course. The talk covered the eLib project, HeadLine's aims, Our view of the Hybrid Library, Progress so far: Phase1, User Requirements, Phase 2, Demo of Shelfmark Locator: Practical Session. I began by asking them what they thought a hybrid library should do, and we discussed the answers after the talk. The talk went well and there was a good discussion afterwards.
10-Mar-99	talk	eLib Concertation days	Jonathan Eaton's gave a presentation at the eLib Concertation Day entitled, "Authentication - an overview of hybrid library requirements"