



## Resource Discovery Infokit: Project Extension

### 1. Background

The CDLR have been commissioned by the JISC to develop a Resource Discovery Infokit which identifies and describes a comprehensive range of relevant resources, tools and projects, offers views of this content based on a series of key questions and themes, and provides briefing papers on the implementation of resource discovery solutions. The taxonomic framework approach used to build the Infokit will be documented as an example of best practice. The controlled vocabularies implemented within the Infokit will also be documented and shared with the wider community. Good progress has been made with the creation of the Infokit during the first three months of the project (detailed in the interim report).

As part of the initial scoping work, the project team has been considering how best to implement the Infokit and integrate it into the JISC website. Three main approaches were identified (again detailed in the interim report) and discussed with the Programme Manager. It was agreed that the more innovative and sophisticated technical solution was to be preferred over the other two. It was also acknowledged that additional project resources would be required to realise this solution. Consequently, the project team has drawn up a proposal for an extension to the existing project and additional funding of up to £20,000.

### 2. Revised aims and objectives

The main aim of the original project is to make it easier for JISC projects and those implementing resource discovery services within UK HE institutions to find information on resource discovery solutions, and the original objectives were focused on the Infokit as a functional product, explicitly to:

- create a Resource Discovery Infokit on the JISC website;
- offer views of the content of the Infokit according to key questions and themes;
- explain clearly how to implement resource discovery solutions;
- provide pointers to useful resources and projects;
- develop a plan for the future maintenance of the Infokit.

The extended project would also aim to increase the level of understanding of, and produce new resources relating to, the creation of small scale resource discovery services, with additional objectives focused on the processes used to create the Infokit as follows:

- to implement the Infokit in an integrated and sustainable way;
- to document the process of creating the Infokit as an exemplar of best practice;
- to create and document a set of reusable controlled vocabularies;
- to carry out and document a taxonomic analysis of the JISC Information Environment;
- to investigate, and where possible implement, the use of SKOS within the Infokit and document this process as a case study.

### 3. Revised methodology

The methodology set out in the project plan is proving successful, with good progress being made on all fronts, and this work will continue. The extension to the project will resolve the granularity issues identified in the interim report, allowing us to incorporate a greater level of detail into the IE taxonomy and controlled vocabularies by adding broader and narrower terms etc, thereby increasing their applicability and long-term value. It will also allow us to maximise the scope of the Infokit, expanding the coverage to include items at higher levels of operational granularity.

The preferred technical solution for the Infokit has now been agreed with the JISC and the extended project will implement this in full. The Infokit will take the form of a dynamic, database-driven website, and will be delivered using the CDLR's existing technical infrastructure, which is mature, stable and

already running similar services. The expectation is that the Infokit will eventually be handed over to the JISC; in the meantime CDLR will guarantee to host and maintain the website for one year.

The extended project will not only create the controlled vocabularies and taxonomy in SKOS, but will also explore and hopefully implement the use of URIs to look up vocabulary terms. This will separate the local database content (item level metadata within the Infokit) from the globally applicable access points (vocabulary terms), resulting in a genuinely innovative and theoretically sound product. It will also allow us to develop separate maintenance strategies for the Infokit and its associated vocabularies, which should be considered as distinct outputs of the project.

#### **4. Revised project outputs**

The following project outputs have already been delivered to the JISC:

- a project plan with full details of the methodology, workplan, etc;
- an interim report detailing the key questions and themes to be addressed, identifying the most relevant resources for inclusion, proposing an approach for displaying this information within a series of web pages and recommending a technical solution that can achieve this.

There are two outstanding deliverables from the original project, amended as follows:

- the design and content of the Infokit, including relevant FAQs and briefing papers, to be delivered via the CDLR's existing technical infrastructure and guaranteed for one year;
- a final report, including a plan for the future maintenance of the Infokit, to be delivered by the project end date.

Some additional outputs were identified in the original project plan and these are now expressed as formal deliverables of the extended project:

- documentation, in the form of a case study, of the use of the taxonomic framework to organise and display the content of the Infokit;
- documentation of a set of reusable controlled vocabularies, including JISC programmes and projects, UK HE and FE institutions, and technical standards;
- documentation of both the JISC IE taxonomy and its development;
- documentation, again in the form of a case study, of the knowledge and experience gained by investigating the use of SKOS to evaluate, apply and share vocabularies and taxonomies.

These new deliverables will be presented as part of the final report.

#### **5. Revised project outcomes**

The expected outcomes of the project remain unchanged:

- improved discovery of and access to resources relating to resource discovery, resulting in more efficient / effective implementation of resource discovery solutions within the JISC community;
- a improved understanding, in the form of a taxonomy or ontology, of the JISC Information Environment's technical and functional attributes, together with an improved understanding of how we might use SKOS to share this understanding with other communities, potentially resulting in greater cohesion within and across similar communities worldwide;
- a high profile demonstration of the use of taxonomic frameworks to structure collections of information resources on the web, potentially resulting in improved practice elsewhere.

The extension will greatly increase the likelihood that these outcomes will be realised.

#### **6. Revised staffing allocation**

As stated in the Interim Report, Gordon Dunsire is both directing and managing the project, with contributions from various senior researchers within CDLR as required, particularly with regard to drafting of project documentation and day-to-day project management. A junior researcher, Tony Ross, has been assigned to the project on a full time basis, with effect from 10<sup>th</sup> September. The revised budget shows a reduced pro rata management contribution, as the project is expected to proceed in a more straightforward manner following the formative evaluation that has just been carried out. The emphasis will now be placed on the completeness and quality of the project outputs, which will require a proportionately greater investment of Tony's time.

## 7. Revised budget

Removed for data protection and privacy.

## 8. Revised timescale

The project is currently scheduled for completion at the end of December 2007. Under this proposal, the project would be extended from 1 Jan 2008 until the 30 April 2008.

A summary of project outputs and delivery dates follow – a more detailed Gantt chart and workpackages for the extended project can be provided on request.

Project plan	End Aug 2007 (delivered)
Technical options appraisal and interim report	Mid Oct 2007 (delivered)
Controlled vocabularies	End Feb 2008
Taxonomy of the JISC IE	End Feb 2008
Database of resources	End Feb 2008
FAQs and briefing papers	End Mar 2008
Infokit website	End Apr 2008
Final report	End Apr 2008
Journal articles	Apr 2008

## 9. Dissemination

In addition to the documentary outputs of the project described above, the project team expects to write three articles, one based on the faceted taxonomic approach used to construct the Infokit, another based on the development of the JISC IE vocabulary, and a third on the project's experiences of expressing controlled vocabularies in SKOS. This activity will take place at the end of the project.

## 10. Exit and Sustainability Planning

The project plan identified three main outputs which should be considered as part of the project's exit strategy: the Infokit itself, comprising both the published web pages and the underlying database, the associated vocabularies, and the learning from the project.

Given the decisions that have already been taken regarding a CDLR-based technical solution for the Infokit website, further development of a sustainability plan for the Infokit will include a consideration of the infrastructure and other requirements that would enable it to move from CDLR to the JISC or Eduserv at a later date.

It is expected that the learning from the project will now take the form of a number of discrete documentary outputs; long term access to these outputs, and their dissemination to the JISC community, will now form an explicit part of the exit plan for the project.