



## Project Document Cover Sheet

Project Information			
<b>Project Acronym</b>	SUDAMIH		
<b>Project Title</b>	Supporting Data Management Infrastructure for the Humanities (SUDAMIH)		
<b>Start Date</b>	01 October 2009	<b>End Date</b>	31 March 2011
<b>Lead Institution</b>	University of Oxford		
<b>Project Director</b>	Professor Paul Jeffreys		
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<b>Partner Institutions</b>	n/a		
<b>Project Web URL</b>	<a href="http://sudamih.oucs.ox.ac.uk/">http://sudamih.oucs.ox.ac.uk/</a>		
<b>Programme Name (and number)</b>	<i>Research Data Management Infrastructure</i>		
<b>Programme Manager</b>	Dr. Simon Hodson		

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1.0	22-Jan-2010	Initial project plan for submission to JISC
1.1	10-Feb-2010	Minor edits and changes to WP timings; budget update
2.0	05-Mar-2010	Changes in response to JISC feedback
2.1	03-Aug-2010	Updated work package timings & minor corrections



# JISC Project Plan

## Overview of Project

### 1. Background

SUDAMIH (Supporting Data Management Infrastructure for the Humanities) will build on the data management infrastructure framework developed by an Oxford University internally-funded scoping study<sup>1</sup> and its continuation through the JISC-funded Embedding Institutional Data Curation Services in Research (EIDCSR) project.<sup>2</sup> The former study was a cross-agency collaborative effort to scope the requirements for services to manage and curate research data generated at Oxford and involved interviewing around 40 researchers as well as conducting a consultation exercise with service units across the University. The EIDCSR Project is currently addressing the data management requirements of three collaborating research groups (from medical sciences and computational biology) by scoping their curation and preservation requirements for research data and embedding selected elements of the digital curation lifecycle, including policy, workflow, and sustainability solutions within the research process at an early stage.

In addition to this, the project will learn from and build on the work undertaken by the Libraries with projects such as Paradigm<sup>3</sup> and FutureArch,<sup>4</sup> investigating the management and curation of private archives. Through these activities there is a recognition that early intervention is required to assist authors to manage their own data with a view to future curation. There are a number of lessons learnt and future directions that would be directly applicable to supporting humanities researchers (in particular) to manage the data they create or for which they have responsibility.

Data created or assembled in the process of humanities research can have a very long useful lifespan, with researchers returning to analyse the same sources and information again and again during the course of their careers. SUDAMIH therefore recognizes the need to support the “life’s-work” nature of much humanities research, ensuring the manageability of data over potentially long periods of time, and at least over that part of a researcher’s career that is spent in Oxford.

SUDAMIH will also build on other previous work undertaken in the University of Oxford to understand the working practices and requirements from researchers in humanities and map their activities across the division. Notably these include the JISC-funded humanities VRE projects<sup>5</sup> and the Digital Humanities at Oxford<sup>6</sup> activities led by the OeRC.

The SUDAMIH project is driven by the requirements of researchers within the Humanities Division at Oxford. It is hoped that the project will assist researchers to better manage their research data and ultimately improve the quality, accessibility, and usability of humanities research data in UK Higher Education.

### 2. Aims and Objectives

SUDAMIH aims to address a coherent range of requirements for the more effective management of data (broadly defined) within the humanities at an institutional level.

The project’s objectives include:

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<sup>1</sup> The scoping digital repository services for research data management project, <<http://www.ict.ox.ac.uk/odit/projects/digitalrepository/>>.

<sup>2</sup> The embedding institutional data curation services in research project, <<http://eidcsr.oucs.ox.ac.uk/>>.

<sup>3</sup> The PARADIGM project, <<http://www.paradigm.ac.uk/>>.

<sup>4</sup> The FutureArch project, <<http://futurearchives.blogspot.com/>>.

<sup>5</sup> Building a virtual research environment for the humanities, <<http://bvreh.humanities.ox.ac.uk/>>.

<sup>6</sup> Digital humanities at Oxford, <<http://www.oerc.ox.ac.uk/humanities/>>.

- developing institutional services for data management, curation, and long-term preservation for selected humanities research activities, but with a view to ensuring the deliverables can then be expanded to other activities within the humanities and beyond;
- addressing database support needs within the humanities, including support for specific data types but also sustainability and service costing models;
- understanding the training and support requirements for humanities researchers and developing a data management skills course and other support activities, in collaboration with the DCC but tailored to the requirements of the humanities.
- investigating the roles and responsibilities of service providers in Oxford for supporting humanities researchers in the management and curation of research data; developing a deeper understanding of research workflows and how they may interface with institutional services.

### 3. Overall Approach

The overall approach follows the three-stage process methodology proposed in the Call for Proposals document:

#### Stage 1. Analysis:

An analysis of the research data management requirements using the latest revision of the Data Audit Framework (DAF) and the DCC Data Management Plan Checklist, at the divisional level, in order to define the component services that would be required to support humanities researchers in Oxford across their research lifecycle, with a particular focus on the creation of accessible, data-rich resources, their ongoing maintenance and the provision of data management training.

#### Stage 2. Pre-implementation:

The identification of “touch-points” of the requirements gathered with existing services in the University and in particular with those provided at the Faculty-level and those provided centrally. It is expected to develop a “service catalogue” for activities to readily identify services for research data management at various stages in the research process. This stage will also include the analysis of training requirements for humanities researchers, identifying the different needs of those early in their careers and of those who are well established.

#### Stage 3. Implementation:

The pilot implementation of an online, low cost database provisioning service to streamline the configuration and building of online database applications that support the multimedia (including text and images) datasets often generated within humanities research, as well as the capacity to map geo-referenced data. The service will be trialled with selected activities within the division at different stages in their lifecycle (e.g. a start-up project, an established project; supporting a PhD student, and an established scholar) and with different types of data. The implementation phase also includes the piloting of training modules and other support activities – designed to complement the Humanities Research Facilitator’s Team in their advice and support to PIs and applicants, and devised in conjunction with the DCC (e.g. Using Digital Curation 101 as a starting point).

Whilst the resource constraints of the project will not enable a deep engagement with more than two or three research activities (reflected in the curricula vitae of the co-investigators), those activities have been selected to include within them a mixture of career stages, research methods, data types, and collaborations; as well as ensuring that the project outcomes are applicable to a broad range of activities both within and beyond the University of Oxford (in this sense complementing the EIDCSR project, both in terms of the subject coverage and also the deliverables).

### 4. Project Outputs

- A report detailing the requirements from humanities researchers in Oxford that also documents the management practices and training needs, based on the DAF methodology.

Desktop research will also enable requirements within Oxford to be contextualized within the requirements of the broader UK humanities communities.

- A pilot "database as a service" (DaaS) system evaluated by early adopters within the humanities that enables the efficient creation of online databases and semi-automation of the development of retrieval interfaces. The database as a service will be attuned to good practice in data curation, including the early capture of metadata, and the potential for development and re-use of data over the long time periods associated with the "life's work" nature of humanities research. The DaaS will include particular support for image and geo-data as well as text and other popular data types.
- A series of training modules to improve researchers' skills in data management, at various points in the academic career and data lifecycle, covering best practice and also services available to them in the University and elsewhere. These modules will be underpinned by the "life's work" theme that aims to address longitudinal data management requirements during the course of an academic career. They may include tailored aspects of DCC modules.
- A project website with information about the project, including a blog to describe the day-to-day experiences and RSS-supported bookmarks of relevant activities and publications, which also links to and cross-references other relevant Oxford sites.
- Publications and presentations in relevant journals and conferences.
- Two project workshops to bring together humanities researchers with experts in data management, whether from within the humanities or as service providers (local and national).
- A final report, describing the process of implementing data management infrastructure for the humanities and making recommendations on how JISC might consider continuing work in this area.

## 5. Project Outcomes

- Evidence of data management requirements and cultural considerations specific to the humanities.
- A better understanding of possible institutional models for dealing with the management and sustainability of long-lifespan data generated during the course of humanities research activities.
- An improved awareness about the benefits of actively supporting researchers in the management of their data in HE institutions.
- The development of services that have the potential to be expanded to other research domains (within and beyond the University of Oxford), providing sustainable research data management capabilities.

## 6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
University of Oxford – Humanities Division and service units with responsibility for supporting research	The University of Oxford is committed to the project and has a long-term interest in its outputs. By addressing the data management needs of researchers in the humanities, SUDAMIH will lay the groundwork for a future institutional research data management infrastructure. SUDAMIH will also help define the interlocking roles and responsibilities of the service units to assist researchers to manage their data more effectively.	High
JISC	The curation of research data is a strategic priority for both the JISC Infrastructure and Resources and the Support of Research committees.	High

UK Research Data Service	The University of Oxford has a formal liaison role with UKRDS to plan Pathfinder services and submit a business plan and proposal to HEFCE. If this activity is funded, experience from the SUDAMIH project will provide direct input into UKRDS.	High
The Digital Curation Centre	The DCC is engaging with staff in HEIs with an interest in data management through the Research Data Management Forum and data curation training.	High
Other research data management projects and services	Other projects investigating issues related to the management and curation of research data may provide useful tools and information, and deploy some of the outputs of this project.	Medium
Higher Education Institutions with research interests in the humanities	The technology and training trialled by SUDAMIH will be of interest to institutions besides Oxford with humanities research interests.	Medium
The Research Information Network	Research data management and curation is one of the RIN's five major strands of work. The findings of the SUDAMIH project will help inform their recommendations in future.	Low

## 7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Score (PxS)	Mitigation
<b>Staffing</b>				
Loss of key staff before end of the project.	2	3	6	Project will be embedded in institutional practices, ensuring a number of individuals have expertise and willingness to assume responsibilities.
Failure to recruit appropriate staff for the project.	1	3	3	Most staff members are now in place. Sharing of staff between EIDCSR and SUDAMIH will ensure that knowledge can be shared between the two projects
<b>Organizational</b>				
Expectations mismatch	2	3	6	Ensure continued engagement via

between project and research activities.				project's Working Group and Steering Group to maintain initial buy-in and momentum.
Lack of coordination between project stakeholders.	1	3	3	Ensure clear reporting and communication lines; take advantage of existing institutional communication structures.
Identified researcher requirements are unrepresentative	1	4	4	Conduct interviews with researchers in every discipline within the Oxford Humanities Division. Interview people with a broad range of roles.
Researchers do not wish to participate in trialling DaaS	2	4	8	Ensure functionality of DaaS is clear and system can be integrated into research lifecycle. Develop DaaS according to real identified needs.
Difficulty attracting workshop participants	1	2	2	Plan workshops well in advance and invite speakers who will appeal to humanities research community. Publicize widely via mailing lists and other media.
<b>Technical</b>				
Development of online database provisioning system proves to be too complex.	2	3	6	WP builds on existing and planned internal infrastructure; staff have requisite technical skills.
Research data often not in digital or easily digitized formats	2	2	4	Consider broader data management issues. Do not try to alter research culture to fit the project!

## 8. Standards

The metadata required to describe, administer, and preserve the research data will comply with research community standards as well as those available at the JISC Standards Catalogue. Technical components will be developed in line with a service-oriented architecture approach and use (wherever possible) open standards, such as Web Services. The project website will comply with relevant accessibility, encoding, and dissemination standards.

## 9. Technical Development

The technical component of this project will take a service-oriented architecture approach to implementation, taking advantage of open APIs where possible. The DaaS (Database as a Service) will include support for textual, image, and geo-data, reflecting the multimedia nature of much of humanities research. The DaaS itself will be built on and extend database provisioning infrastructure developed by OUCS originally for internal purposes (including a review of the Archer e-Research

Toolset). The Project will investigate and advise on tools, lightweight server applications and other means of end-to-end interoperability with the DaaS, from personal computing devices to (for example) Google Maps mashups.

## 10. Intellectual Property Rights

Any IPR resulting from this project will remain the property of the organization generating it. Under the University of Oxford's policy on intellectual property (which covers all University employees and students), the University claims ownership of a range of intellectual property rights with commercial potential. The University does not assert any claim to the ownership of copyright in artistic works, books, articles, or lectures, apart from those specifically commissioned by the University. Results arising from projects funded by the JISC at Oxford would therefore usually be owned in the first instance by the University as the employing institution. The University seeks to maximize the commercial potential of its intellectual property through its wholly-owned technology transfer company, ISIS Innovation Ltd. In accordance with the desires of the JISC Research Data Programme, however, it is proposed to release project deliverables under either a Creative Commons license or, in the case of software, under an open source software license to maximize the benefit for the wider community.

## Project Resources

### 11. Project Partners

The SUDAMIH project is based wholly within the University of Oxford.

### 12. Project Management

The project will be led by OUCS and report to the University's Research Committee Information Management Sub-committee. This Sub-committee was established to ensure coordination, communication and collaboration between activities addressing information from research. In addition to this, the project will be supported by a Steering Group comprising key stakeholder representatives, both from within Oxford and from the national community. The Steering Group will be chaired by a senior humanities academic from a research-led university (not Oxford).

Steering Group	
Prof. David Shepherd	Chair
Prof. Paul W. Jeffreys	Principal Investigator
Dr. Michael Fraser	Co-investigator
Dr. Ian Archer	Co-investigator
Prof. Andrew Wilson	Co-investigator
Dr. Andrew Fairweather-Tall	Assistant Registrar (Research)
Dr. Simon Hodson	JISC Programme Manager
Prof. David Robey	Oxford eResearch Centre
Sally Rumsey	Library Services
Kathryn Dally	Research Services
Joy Davidson	DCC Representative
Dr. James A. J. Wilson (in attendance)	Project Manager

The Project Working Group, comprising members of the project team, humanities academics, RSO and OULS representatives, will help facilitate an agile and iterative approach to the development of the project outputs.

Project Working Group		
Prof. Paul W. Jeffreys	Principal Investigator	<a href="mailto:paul.jeffreys@odit.ox.ac.uk">paul.jeffreys@odit.ox.ac.uk</a> Tel: 01865 273229
Dr Michael Fraser	Co-Investigator	<a href="mailto:mike.fraser@oucs.ox.ac.uk">mike.fraser@oucs.ox.ac.uk</a> Tel: 01865 283343
Dr. Ian Archer	Co-Investigator	<a href="mailto:ian.archer@keble.ox.ac.uk">ian.archer@keble.ox.ac.uk</a> Tel: 01865 272727
Prof. Andrew Wilson	Co-Investigator	<a href="mailto:andrew.wilson@arch.ox.ac.uk">andrew.wilson@arch.ox.ac.uk</a> Tel : 01865 279385
Dr. James A. J. Wilson	Project Manager	<a href="mailto:james.wilson@oucs.ox.ac.uk">james.wilson@oucs.ox.ac.uk</a> Tel: 01865 283347
Dr. Andrew Fairweather-Tall	Assistant Registrar (Research)	<a href="mailto:andrew.fairweather-tall@humanities.ox.ac.uk">andrew.fairweather-tall@humanities.ox.ac.uk</a> Tel: 01865 270567
Dr. Miko Flohr	Faculty of Classics	<a href="mailto:miko.flohr@classics.ox.ac.uk">miko.flohr@classics.ox.ac.uk</a> Tel: tbc
Erin Cooper	Library Services	<a href="mailto:erin.cooper@bodleian.ox.ac.uk">erin.cooper@bodleian.ox.ac.uk</a> Tel: 01865 280049
Kathryn Dally	Research Services	<a href="mailto:kathryn.dally@admin.ox.ac.uk">kathryn.dally@admin.ox.ac.uk</a> Tel: 01865 280319
John Ireland	Computing Services	<a href="mailto:john.ireland@oucs.ox.ac.uk">john.ireland@oucs.ox.ac.uk</a> Tel: 01865 283284
Asif Akram	Systems Developer	<a href="mailto:asif.akram@oucs.ox.ac.uk">asif.akram@oucs.ox.ac.uk</a> Tel: 01865 283352
Dr. Meriel Patrick	Analyst	<a href="mailto:meriel.patrick@oucs.ox.ac.uk">meriel.patrick@oucs.ox.ac.uk</a> Tel: 01865 273260

The Project Manager, reporting to the Head of Infrastructure Systems and Services (OUCS), will have the responsibility for day-to-day coordination of the project; including maintaining the project plan, and liaising between collaborators. The Analyst will lead the audit and requirements analysis workpackage. The Library Services and OUCS's IT Learning Programme will deal with activities relating to metadata and training, with support from other interested parties. A Systems Developer will help conduct the technical analysis and lead the development of the technical implementation workpackages.

The Project Manager will be employed at 0.5 FTE on the SUDAMIH project, and 0.5 FTE on the associated EIDCSR project. As these projects overlap in terms of scope and methodology it is anticipated that this will result in synergies.

### 13. Programme Support

The Project Working Group requests support from the Programme Manager in the following areas:

- Alerting and introducing the project to other relevant activities.
- Helping to define the aims and objectives of the two workshops as well as promoting them.
- Dissemination activities
- Assisting with the sustainability of outcomes

### 14. Budget

See Appendix A.

## Detailed Project Planning

### 15. Workpackages

See Appendix B.

### 16. Evaluation Plan

SUDAMIH has set aside funds for a formative evaluation once the initial development of the DaaS and training modules has commenced (September-October 2010). This evaluation will ensure that the project is making adequate progress towards its objectives and, in particular, that the development of the DaaS and training modules reflects user requirements.

Timing	Factor to Evaluate	Questions to Address	Method(s)	Measure of Success
Throughout	Aims and objectives	Is the project progressing appropriately towards meeting its aims and objectives as expected?	Steering Group	Milestones being met and workpackages proceeding as per scheduled
May 2010	Data assets & practices audits	Have the audits been completed successfully?	Review documentation	Clear report providing enough information to inform technical development and compatible with DAF standards
Oct 2010	Progress to date	Is the project on course to meet its aims and objectives?	External Evaluators	Evaluation report does not suggest major revisions
Oct / Nov 2010	DaaS development	Is the DaaS development appropriate to meet research needs?	User assessment	DaaS would be recommended to peers in research community
July 2010 & Dec 2010	Training workshops	Have appropriate training requirements been identified and translated into practical and relevant training modules?	User assessment	Positive responses from trialists
Feb 2011	Economic cost models	Are costs of development and training being monitored in such a way as will enable the project to create realistic cost models for future data management undertakings?	Project Working Group	Costs models are being developed and will be applicable to related future service developments
Throughout	Dissemination	Has internal and external dissemination through the different channels of communication run according to the dissemination plan?	Project Working Group	Dissemination work is progressing according to Project Plan

### 17. Quality Plan

Timing	Quality criteria	QA method(s)	Evidence of compliance	Quality responsibilities
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<b>Output</b>	<b>Project website, blog and bookmarks</b>			
End of January 2010 (& ongoing)	Adherence to standards and specifications, well written content	Follows W3C standards and is reviewed by Project Working Group	Validation checks are passed.	Project Manager, Project Working Group
<b>Output</b>	<b>Project workshops</b>			
July 2010 & December 2010	Well attended workshops with positive feedback	Feedback from attendees; commissioned evaluation process	Evaluation report and positive feedback from delegates	Project Manager, Project Working Group and Programme Manager
<b>Output</b>	<b>Data audits and requirements analysis report</b>			
May 2010	Contains enough accurate and representative information to support work in WP3 and WP6	Commissioned evaluation process and timely delivery of outputs	Agreed by Steering Group	Analyst, Project Manager and Project Working Group
<b>Output</b>	<b>Pilot "Database as a Service" (DaaS) system</b>			
November 2010 & February 2011	Functional and usable software to facilitate the creation, management, and preservation of custom research databases	Evaluation by humanities researchers	Meets Functional Specification requirements. Positive feedback from trialists.	Systems Developer, Project Working Group
<b>Output</b>	<b>Training modules</b>			
December 2010 & March 2011	An effective suite of training models tailored for researchers at various career stages, detailing services available and best practice	Evaluation by humanities researchers	Evaluation report and positive feedback from trialists	Project Manager and Project Working Group
<b>Output</b>	<b>Publications &amp; Presentations</b>			
Throughout	Articles published in peer-reviewed journals and papers/posters accepted at relevant conferences and workshops	Review by Project Working Group. Acceptance by peer-review panels	Acceptance of papers and presentations	Project Manager and Project Working Group
<b>Output</b>	<b>Report on the application of costing frameworks</b>			
End of February 2011	Enables costs estimates to be made for developing and extending similar services in future	Review by Project Working Group	Signed off by Project Working Group and Programme Manager	Project Manager, Project Working Group
<b>Output</b>	<b>Final report</b>			
End of March 2011	Fully addresses all aspects of the	Review by Steering Group and	Signed off by Steering Group	Project Manager, Project Working

	project, with advice and recommendations for future development	Programme Manager	and Programme Manager	Group
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## 18. Dissemination Plan

Internal and external dissemination will run throughout the project. Dissemination will comprise multiple channels of communication:

- A project website, blog, and bookmarking site will be set up and maintained with regular updates; the project will also make use of other JISC, RUGIT, and digital humanities dissemination channels;
- An events diary will be developed, with participation in conferences, JISC programme meetings, and other events;
- At least two articles about the project's findings will be submitted to relevant publications;
- Two themed workshops will be organized to stimulate discussion amongst stakeholders. Internal dissemination will be facilitated through additional informal events as well as through the proposed stakeholder engagement structure;
- Project staff will continue to engage with the DCC Research Data Management Forum as part of the communication channels with the JISC community. The project will contribute to other JISC-related activities as appropriate.

Timing	Dissemination Activity	Audience	Purpose	Key Message
By December 2009	Project website, including blog posts, bookmarks, and an events diary, plus a Facebook group linked to blog and events diary.	Any interested parties	Raise awareness of project and inform other interested parties of progress, events, and findings	What are we doing and what are we discovering?
By end of July 2010 & December 2010	Two workshops	Internal/external stakeholders and wider community	Engage research community and encourage thought and knowledge contributions	Research data management can and should be improved
As opportunities arise	Two articles published in relevant journals	External stakeholders and wider community	Inform research community about project findings	Dependent upon findings: what works, what doesn't, and why?
As opportunities arise	Conference presentations or posters submitted to relevant events	External stakeholders and wider community	Raise awareness of projects and encourage interest	What are we doing and what are we finding?
As opportunities arise	Internal dissemination	Internal stakeholders	Ensure Oxford researchers and policy makers are aware of the significance of what we're doing	SUDAMIH is an important project with outputs that will help improve research
Throughout the project	Communication with other related projects	Other JISC projects	Ensure that other projects can benefit from our	Let's share our findings and see if we can

			findings and that we can benefit from theirs likewise	identify common conclusions or interesting distinctions
As necessary	Involvement in JISC programme events	Dependent on opportunities	Receive benefits of JISC methods and findings; communicate with other projects	What are we doing and finding, and how can we do it better?

## 19. Exit and Sustainability Plans

The University of Oxford recognizes the need to have a technical infrastructure supported by policies and procedures in place to deal with the management and curation of research data. There is top-level commitment to continue to support and fund activities in this area to ensure sustainable services to support research.

The UKRDS is working towards the submission of a proposal to the HEFCE Strategic Development Fund. The University of Oxford is one of the original case study sites and has been allocated funding to provide a liaison role between Oxford and the UKRDS, especially in connection with the EIDCSR Project. The SUDAMIH Project has the support of the UKRDS and its activities will be fully compatible with proposed UKRDS Pathfinder activities.

<b>Project Outputs &amp; Outcomes</b>	<b>Action for Take-up &amp; Embedding</b>	<b>Action for Exit</b>
All reports including audit findings, costing frameworks, progress, evaluation and final reports	Deliver to appropriate individuals and deposit copies with the Oxford Research Archive (ORA)	Ongoing preservation and maintenance for ORA.
Pilot DaaS (database as a service) software	Ensure software meets researcher needs and can be embedded into the humanities research cycle. Make available under an open source licence if possible	Ensure clear responsibilities for continued development and maintenance of software
Data management training materials	Work with Oxford's IT Learning Programme and faculty graduate training programmes to ensure relevance	Ensure those with training responsibilities (Libraries, Information Technology Learning Programme, &c.) understand and can apply modules
Project website, blog, and bookmarks	Negotiate links to website from other key University web pages	Ensure editorial, hosting, and maintenance responsibilities.
Curated research data generated by humanities researchers	Research data curated with enough information about provenance, ownership, and preservation to enable discovery and access	Clear responsibilities for the continued curation of the research data
Improved knowledge of how to manage research data at an institutional level	Combine findings from SUDAMIH, EIDCSR, and other related projects regarding institutional data management models and ensure these are understood by policy makers both within Oxford and in the UK HE community more generally.	Bring report to the attention of policy makers and feed outcomes into UKRDS activities.

<b>Project Outputs</b>	<b>Why Sustainable</b>	<b>Scenarios for Taking Forward</b>	<b>Issues to Address</b>
Pilot DaaS (database as a service) software	There is demand for simple database creation and curation software tools amongst humanities researchers	Researchers demand simple software tools for database creation, data analysis, and curation	Further software development, maintenance, and support responsibilities
Data management training modules	Good data management is increasingly being recognized as a crucial aspect of academic practice	Good data management practices are recognized as important for research	Integration into departmental and faculty training programmes. Future development responsibilities
Curated research data generated by researchers	Demand from academics to be able to efficiently access and reuse their research data	Research data can be easily analysed, referenced, and reused by researchers, improving academic practice	Long-term preservation policies and access controls
Cost models for data management services	Required for institutions to make informed policy decisions	Institutions can compare relative costs of various different data management implementations. EIDCSR results to feed in here	Cost models are reliable and usable by policy makers

## ***Appendices***

### **Appendix A. Project Budget**

(omitted from this version of file)

## Appendix B. Workpackages

Project start date: 01 October 2009  
 Project completion date: 31 March 2011  
 Duration: 18 months

WORKPACKAGES	2009			2010												2010		
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
<b>Stages</b>	Analysis →					Pre-implementation →						Implementation →						
<b>1: Project Management</b>																		
<b>2: Audit and Requirements Analysis</b>																		
<b>3: DaaS Infrastructure</b>																		
<b>4: Image Data Management</b>																		
<b>5: Visualization of Data</b>																		
<b>6: Data Management Training</b>																		
<b>7: Cost Models for Data Mgmt Services</b>																		
<b>8: Dissemination</b>																		
<b>9: Evaluation</b>																		

Lighter areas indicate periods where workload of a given workpackage is anticipated to be light.

Workpackages and activities	Earliest start date	Latest completion date	Outputs	Milestone	Responsibility
WORKPACKAGE 1: Project Management <u><b>Objective:</b></u> To ensure timely and efficient delivery of project deliverables, produce project plans and progress reports, manage the finances and liaise between project collaborators.	01/10/09	30/03/11			Project Manager
1. Produce Initial Project Plan	01/10/09	21/12/09	Initial Project Plan	X	
2. Recruit Researcher	01/11/09	11/01/10		X	
3. Recruit Systems Developer	01/11/09	11/01/10		X	

4. Write monthly Status Reports	28/01/10	31/03/11			
5. Prepare progress reports for JISC	28/01/10	31/03/11	JISC Progress Report	X	
6. Hold fortnightly project team meetings	11/01/10	21/03/11			
7. Invite Chair for steering committee	01/12/09	21/12/09			
8. Hold Steering Committee Meetings	01/02/10	31/03/11			
9. Write final JISC report	01/03/11	31/03/11	JISC Final Report	X	
<b>WORKPACKAGE 2: Audit and Requirements Analysis</b> <u><b>Objective</b></u> To audit data assets and data management practices in the Humanities Division and undertake an analysis of researchers' requirements for data management infrastructure services	<b>11/01/10</b>	<b>23/07/10</b>			<b>Project Manager &amp; Analyst</b>
10. Audit data assets & data management practices	13/01/10	26/03/10			
11. Determine researchers to interview & arrange interviews	29/01/10	05/02/10			
12. Prepare interviews	11/01/10	05/02/10			
13. Conduct interviews	05/02/10	05/04/10			
14. Compile initial data audit report	06/04/10	30/04/10	Initial DAF report	X	
15. Compile initial researcher requirements report	06/04/10	28/05/10	Initial Researcher Reqs. report	X	
16. Conduct follow-up interviews and research as required	06/04/10	30/06/10			
17. Publish final data audit report	-	23/07/10	Final DAF report	X	
18. Publish final researcher requirements report	-	23/07/10	Final Researcher Reqs. Report	X	
<b>WORKPACKAGE 3: DaaS Infrastructure</b> <u><b>Objective:</b></u> To translate user requirements to a functional specification; to evaluate technologies to enable a database as a Service infrastructure; to implement such an infrastructure and pilot it with selected humanities research activities	<b>24/03/09</b>	<b>18/02/10</b>			<b>Systems Developer</b>
19. Produce functional specification	24/03/10	15/04/10	DaaS Functional Specifications		
20. Evaluate technologies to enable DaaS infrastructure	15/04/10	27/08/10			
21. Produce priority recommendations	24/05/10	27/08/10	Technical recommendations		
22. Implement online database provisioning system	08/06/10	08/10/10	First trial version of DaaS	X	
23. Find participants for pilot project	06/09/10	17/09/10			
24. Pilot DaaS infrastructure	27/0/10	22/10/10			
25. Evaluate DaaS infrastructure	25/10/10	12/11/10	Initial Evaluation Report		

26. Conduct second iteration trial as required	15/11/10	28/01/11			
27. Write full evaluation report	01/02/10	18/02/11	Final DaaS Evaluation Report (part of final JISC report)	X	
WORKPACKAGE 4: Image data management <b>Objective:</b> To investigate and recommend methods and tools for end-to-end management of image metadata and image object relationships within the context of institutional infrastructure. Operates in tandem with WP3	<b>28/06/10</b>	<b>27/08/10</b>	<i>n.b. this WP will feed into WP3</i>		<b>Systems Developer</b>
28. Investigate methods and tools	28/06/10	13/08/10			
29. Report on methods and tools	05/05/10	27/08/10	Image Data Tools Report	X	
WORKPACKAGE 5: Geospatial data management <b>Objective:</b> To investigate and recommend processes and tools for the capture, processing, and visualization of geo-reference data, including interoperability with the DaaS. Operates in tandem with WP3	<b>28/06/10</b>	<b>27/08/10</b>	<i>n.b. this WP will feed into WP3</i>		<b>Systems Developer</b>
30. Investigate processes and tools	28/06/10	13/08/10			
31. Report on processes and tools	16/08/10	27/08/10	Data Visualization Tools Report	X	
WORKPACKAGE 6: Data management training <b>Objective:</b> To analyse data management training and other support needs from WP2; undertake desk research to evaluate existing modules (e.g. DCC 101); develop and pilot training modules and support services	<b>08/02/10</b>	<b>13/03/11</b>			<b>Project Manager</b>
32. Engage those responsible for training provision	08/02/10	-			
33. Evaluate existing training modules	08/02/10	11/06/10			
34. Analyse data management training requirements	28/05/10	30/07/10			
35. Trinity term training pilot (existing training)	14/06/10	25/06/10			
36. Develop training modules and support	02/08/10	01/10/10	First iteration training modules		
37. Recruit researchers to trial training modules	06/09/10	01/10/10			
38. Michaelmas term training pilot modules	04/10/10	16/11/10		X	
39. Assess training modules	19/11/10	26/11/10			
40. Redevelop modules according to feedback from 1 <sup>st</sup> pilot	29/11/10	10/12/10	Second iteration training		

			modules		
41. Recruit second set of researchers	29/11/10	14/01/11			
42. Hilary Term training pilot modules	17/01/11	25/02/11		X	
43. Report on responses to training modules	28/02/11	13/03/11	Final training report (part of final JISC report)	X	
WORKPACKAGE 7: Cost models for data management services <b>Objective:</b> To develop appropriate cost models for the ongoing support and development of infrastructure to support humanities research	<b>11/01/09</b>	<b>18/03/11</b>			<b>Project Manager</b>
44. Research existing models, including EIDCSR models	11/01/10	03/12/10			
45. Monitor costs of development and training	08/03/10	11/02/11	Cost monitoring data		
46. Cost infrastructure development models	16/11/10	04/02/11			
47. Cost models of ongoing support services	16/11/10	04/02/11			
48. Understand review of IT resource allocation	16/11/10	04/02/11			
49. Write costs report	07/02/11	21/02/11	Costs models report (part of final JISC report)	X	
WORKPACKAGE 8: Dissemination <b>Objective:</b> To establish dissemination mechanisms and disseminate project outputs and information on relevant websites, at conferences and other events (including two workshops), and in journals and other publications	<b>16/12/09</b>	<b>10/03/11</b>			<b>Project Manager</b>
50. Identify relevant publications	05/01/10	15/01/10			
51. Identify suitable conferences and deadlines	05/01/10	15/01/10			
52. Identify suitable workshop dates	05/01/10	15/09/10			
53. Identify relevant external websites and online dissemination channels	05/01/10	22/01/10			
54. Produce initial dissemination schedule	15/01/10	22/01/10	Initial dissemination schedule	X	
55. Post events diary	22/01/10	29/01/10	Events diary		
56. Write blog posts	16/12/09	31/03/10	Blog posts		
57. Establish and update project website	01/12/09	09/03/10	Project website	X	
58. Place information/links on external websites	15/01/10	10/03/11			
59. Write first journal article	01/10/10	29/11/10	Draft journal article		

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60. Write second journal article	06/12/10	11/02/11	Draft journal article		
61. Prepare content / contact speakers for first workshop	29/04/10	28/05/10	Workshop plan		
62. Stage first workshop	14/06/10	23/07/10		X	
63. Prepare content / contact speakers for second workshop	31/08/10	15/10/10	Workshop plan		
64. Stage second workshop	25/10/10	10/12/10		X	
65. Write workshop reports	13/12/10	17/12/10	Workshops report	X	
WORKPACKAGE 9: Evaluation <u>Objective:</u> To commission a formative evaluation of the project approximately half-way through the course of the project and implement recommendations	<b>09/08/10</b>	<b>25/10/10</b>			<b>External Evaluator</b>
66. Identify suitable evaluators	09/08/10	10/09/10			
67. Decide evaluation methodology	13/09/10	24/09/10			
68. Commission evaluation of SUDAMIH project	27/09/10	15/10/10			
69. Verify recommendations	18/10/10	22/10/10	Recommendations report	X	
70. Implement recommendations as appropriate	25/10/10	-			