


SECTION A Cover Sheet for Proposals <i>(All sections must be completed)</i>			
Name of Initiative: Enhancing Digital Resources			
Name of Lead Institution: University of Exeter			
Name of Proposed Project:		CHARTER (Creating Heritage Artefacts for Research and Teaching in an E-Repository)	
Name(s) of Project Partner(s):		NA	
Full Contact Details for Primary Contact: Name: Dr Jessica Gardner Position: Head of Special Collections Email: j.p.gardner@exeter.ac.uk Address: Special Collections, Old Library, Prince of Wales Road, Exeter, EX4 4SB. Tel: 01392 263879 Fax: 01392 263871			
Length of Project:		12 months	
Project Start Date:		1 October 2008	
Project End Date:		30 September 2009	
Total Funding Requested from JISC:		£77,049.24	
Total Institutional Contributions:		£77,049.36	
Total Funding Broken Down over Financial Years (April-March):			
April 08 – March 09		April 09 – March 10	
£84,124.34		£69,974.23	
Outline Project Description: <p>CHARTER is a small-scale digitisation pilot which will deliver (under JISC heading 'A') an open-access repository (based on Fedora software) populated with a critical mass of 4000 digital images drawn from the unique and rare resources in the Special Collections of the University of Exeter. CHARTER will select, digitise and deposit 2000 new images and will transfer another 2000 existing images (held in the online EVE database facility of the University's museum, the Bill Douglas Centre) into the repository. This will include the creation of 2000 new metadata records and the creation of a tool for transferring 2000 metadata records from EVE into the repository. The selection theme of the 2000 new images will be popular culture in the long-nineteenth-century, 1800-1914, drawn from across the University's special collections (Bill Douglas Centre, plus Archives & Rare Books). This material has no IPR or copyright issues and has interdisciplinary subject appeal through a wide academic base in the arts and humanities. Academics will participate throughout the project in the process of selection for digitisation and through the creation and testing of an e-learning module. CHARTER will deliver the next phase of Exeter's strategy to capture and preserve digital artefacts and make them freely available for research and teaching (in a key move from a legacy databases (EVE) to a sustainable open access model).</p>			
I have looked at the example FOI form at Appendix A and included an FOI form in the attached bid (Indicate in relevant Box)		YES ✓	NO

I have read the Circular and associated Terms and Conditions of Grant at Appendix B (Indicate in relevant Box)	YES ✓	NO
---	--------------	-----------

SECTION B. FOI Tick List

FOI Withheld Information Form

1. There is **no content** which the University of Exeter wish the JISC to withhold in the event of a Freedom of Information request.

Section C. Quality of Proposal and Robustness of Workplan

2. BACKGROUND & STRATEGY: The University of Exeter has invested heavily to establish a high quality infrastructure around its Special Collections (attaining Registered status for its museum, the Bill Douglas Centre, in 2001 and provisional Approval from The National Archives for its manuscript collections in 2005). This work has run parallel to strategies designed to integrate those collections in to teaching and research. Individual research use by the international scholarly community has increased year on year and Exeter is now one of the UK's leading advocates of the value of evidence-based teaching using special collections. The next strategic phase for widening access must include digital solutions.

3. Two consecutive AHRC projects (2003-2005) created EVE (Everyone's Virtual Exhibition) as an online catalogue and e-learning tool for the collections of the Bill Douglas Centre. This pioneering facility (chosen as an AHRC exemplar in 2005) demonstrated world-wide online demand for collections and began to transform attitudes towards e-learning in the arts and humanities community. However, the EVE interface was primarily a pioneer project and is now a 'legacy' database.

4. AIMS: The digital repository proposed through CHARTER (under JISC heading 'A') will operate as a single, open-access portal to reusable digital surrogates from any source in the University's collections regardless of their physical location or collection origin. This will be stage one of a strategic move away from legacy systems, like EVE, towards a sustainable open-source digital asset infrastructure. Our aim is to populate the repository with digital artefacts in-demand for teaching and research. The reusability of the digital artefacts is essential in how this project will enable greater access to resources that may otherwise be hidden or underexploited by academics and students. To show how the digital objects in the repository can be reused in the curriculum, we will create an e-learning module as a case-study. By integrating users in to the process of selecting material for digitisation and in the creation of the e-learning module, our aim is to embed the resource within its target user community and to facilitate peer-to-peer (student to student and academic to academic) endorsement. CHARTER will also establish the basis for future expansion and sharing of our materials in an open-access and inter-operable environment.

5. OBJECTIVES

OBJECTIVE	MEASURE
<i>To establish by September 2009 the digital repository as a sustainable portal for users to access online digital artefacts drawn from the University's heritage collections regardless of their physical location or collection-origin.</i>	Delivery of facility
<i>To populate by September 2009 the repository with 4000 in-demand popular culture digital artefacts and related metadata (2000 images digitised during the project; 2000 existing images migrated over from a legacy database).</i>	Population of repository with 4000 images (progress measured via project targets & milestones).
<i>To create an e-learning module using the digital artefacts in the repository to demonstrate their value and reusability to academics and students.</i>	Completion and uptake of e-learning module (deposit on Jorum).
<i>To evaluate and disseminate the processes and</i>	Delivery of conference papers, reports, focus

<i>outputs of the project as case-studies and resources of benefit to research, teaching, e-learning, heritage and technical communities of practice.</i>	groups, newsletters, and workshops as per evaluation and dissemination plans.
---	---

6. PROJECT PLAN & TIMETABLE

Phase 1	Project Set-Up
Scope:	Establish operational basis for project to begin
Dates/Duration:	2-3 months: September 08 to November 08
Deliverables:	Appoint Project Manager; recruitment of digitisation staff (to start Jan 09); set up project blog & website; agree reporting & documentation schedule with JISC; purchase equipment.
Provided by:	Principal Investigator; Project Manager; Project Team

Phase 2	Repository Workflow
Scope:	Set-up repository (using Fedora software) and establish migration processes from legacy database (EVE)
Dates/Duration:	4 months: October 08 to January 09. <i>Repository in place by end of December 08.</i>
Deliverables:	Repository and web interface; migration processes from EVE; digital storage processes; transfer of 2000 images & related metadata from EVE; documentation of technical processes and practices; usability testing.
Provided by:	Head of Integration Web Services; with Systems Programmer, Digital Storage Manager (close working with Principal Investigator, Digital Assets Manager and Curator).

Phase 3	Metadata Workflow
Scope:	Adapt Dublin Core metadata fields for repository; map from EVE to repository (Spectrum to Dublin Core).
Dates/Duration:	4 months: October 08 to January 09
Deliverables:	Metadata framework for repository; documentation of mapping between systems.
Provided by:	Digital Assets Manager, Curator, Principal Investigator (with Systems Programmer).

Phase 4	Selection Workflow
Scope:	Selection of objects for digitisation via Selection Panels & ongoing curatorial work
Dates/Duration:	12 months (incl. formal selection panels in November 08, January and March 09)
Deliverables:	Selection of 2000 new digitised popular culture images; selection criteria and case-studies.
Provided by:	Curator, Principal Investigator; interdisciplinary team of academics; Digital Assets Manager & Digitisation staff.

Phase 5	Digitisation Workflow
Scope:	Digitisation of 2000 objects & creation of metadata & quality review processes
Dates/Duration:	9 months: January to September 09
Deliverables:	2000 digital artefacts uploaded to the repository with associate metadata records; documentation of processes and case-studies; back-up CD-ROMs of digital objects.
Provided by:	Digital Assets Manager, with Digitisation staff. Input from Principal Investigator & Curator.

Phase 6	E-Learning Workflow
Scope:	Creation of e-learning module using digital artefacts from the repository.
Dates/Duration:	2 months: April to May 2009
Deliverables:	E-learning module (deposit on Jorum); evaluative case-study and

	documentation; integration of repository in to curriculum.
Provided by:	Head of E-Learning, Educational Technologist, Academic, Curator (with Principal Investigator and input from Academic Liaison librarians)

Phase 7	Evaluation and Dissemination
Scope:	Evaluation and dissemination of the processes, practices and outputs of the project
Dates/Duration:	12 + months: October 08 to September 09, and beyond
Deliverables:	Focus Group reports for repository and e-learning usability testing; documentation of the project via blog; reports to JISC and Project Board; conference papers, workshops, newsletter articles etc.
Provided by:	Led by Project Manager, with full Project Team

PROJECT DELIVERABLES

7. CHARTER will deliver the following outputs:

- o An open access repository (using Fedora software) with web interface and search tools
- o 2000 new 'popular culture' digital surrogates chosen by an interdisciplinary team of academics and freely available to all (resized appropriately for the web; Dublin Core metadata, with locally adapted Library of Congress Subject Headings)
- o 2000 existing 'popular culture' images and metadata migrated from EVE to the repository
- o Sustainable preservation storage of all images in TIFF format on a dedicated server (and 2 copies backed-up on CD-ROM/DVD and stored in separate locations)
- o An e-learning module incorporating digital artefacts in the repository
- o Deposit of the e-learning module case-study in Jorum
- o Principles and practices for digitisation and metadata processes and standards documented and freely available to all
- o Technical and user guidelines for the repository
- o Reports to JISC & project website
- o Dissemination via conference papers, newsletters and workshops (full texts to be deposited in ERIC, Exeter's research repository)
- o Application of a relevant creative commons end-user licence

PROJECT MANAGEMENT ARRANGEMENTS

8. The CHARTER project sits within the Academic Services (library, IT, student and research support services) division of the University's Professional Services. Martin Myhill (Assistant Director of Academic Services) will be institutional sponsor.

9. CHARTER will bring together a multi-disciplinary team (academics, curators, technical experts, educational technologists) under the strategic lead of the Principal Investigator, Dr Jessica Gardner (Head of Special Collections). She will hold responsibility for reporting directly to JISC and the project's internal sponsor, Martin Myhill.

10. CHARTER will appoint a professional Project Manager to provide the project management expertise in support of the Principal Investigator / Project Team. Assigned to the project for one day a week, the Project Manager will be responsible for creating a robust project infrastructure around people, processes and budget, following the University's own established project management framework and audit process (www.offices.ex.ac.uk/spo/). The Project Manager will be qualified in PRINCE2 and (as a secondary outcome of CHARTER) will help to develop the project management skills of the project team.

11. On award of funding by JISC, the University's established project management processes will come in to effect. This will include agreement of a 'Project Initiation Document' (see www.offices.ex.ac.uk/spo/NewProjectDocs/PIDTemplate.doc) with linked stakeholder communication plan and target-setting. This internal process, led by the Project Manager, will provide a framework which will transfer easily to the formal Project Plan required by JISC.

12. There will be a Project Board, which will meet not less than six times during the course of the project:

- o Principal Investigator & Chair, Jessica Gardner (Head of Special Collections)

- o Co-Investigator, Ahmed Abu-Zayed (Digital Assets Manager)
- o Project Manager
- o Stakeholder - Martin Myhill (Assistant Director Academic Services)
- o Stakeholder - Gary Stringer (Creative Media & Information Technology Unit at the University)
- o Stakeholder - Senior Academic
- o Other members of the project team co-opted as required

13. There will be regular Project Team meetings (not less than one a month), chaired by the Project Manager. These meetings will have a formal agenda and decisions and actions will be recorded.

14. The two digitisation staff members employed on the project – Digitisation Officer and Digitisation Assistant – will be directly line-managed by the Digital Assets Manager (Ahmed Abu-Zayed). They will be based within Special Collections where the physical objects to be digitised are stored.

15. CHARTER will set up a blog to enable communication between project members and with the wider community of interest, including the JISC and other JISC projects.

16. RISKS

Risk	Probability (1-5)	Severity (1-5)	Score (PxS)	Action to Prevent/Manage Risk
Staffing risks				
Recruitment and retention of staff	2	3	5	Four months allowed for recruitment of digitisation staff. Project Manager to be recruited from the University's Project Team. All practices and processes will be recorded to facilitate knowledge transfer should staff leave during the project.
Retention of other staff	2	2	4	Full documentation of the practices and processes to facilitate knowledge transfer should staff leave their posts during the project.
Organisational risks				
Failure of the project	1	5	6	CHARTER is aligned to the institution's strategy for research and teaching. The expertise of JISC (AHDS etc) and the Project Board will be utilised to address problems and prevent project failure.
Technical risks				
Metadata Mapping				ISAD(G), SPECTRUM, MARC and Dublin Core already established. Team has experience of mapping between standards. A well-documented area of work with high value learning outcomes.
Digitisation	2	4	6	Well-embedded image capture practices. Some items may prove unsuitable for capture (binding too tight or items too fragile). The collection is large enough for alternate selections to be made.
Transfer of images and metadata from EVE	2	3	5	This is an experimental part of the project. If necessary, the architects of EVE will be 'bought-in' to help by Academic Services. High value learning outcomes.
Implementation of FEDORA	1	5	6	The Fedora software has been tried and tested in other organisations. Sector advice

Risk	Probability (1-5)	Severity (1-5)	Score (PxS)	Action to Prevent/Manage Risk
				will be sought. Problems and solutions will be discussed with JISC. The implementation process has been investigated carefully by the Integration and Web Services Team.
Digital Storage	1	1	2	Industry standard digital storage processes and procedures are already in place at Exeter. Back-ups will be made on cd-rom.
External suppliers				
Supply of 100 outsourced digital images	1	1	2	Out-source to another supplier or an alternate selection of objects can be digitised.
Purchase of Hardware & software	1	1	2	2-3 months allowed for purchasing.
Legal Risks				
IPR & copyright risks: new images	0	0	0	There are no IPR and copyright risks associated with the new digitisation work on the project
IPR & copyright risks: existing images on EVE	1	1	2	A small quantity of the existing images are in-copyright. Rights have either been cleared through the EVE project or are considered very low risk. Images can be removed. An appropriate creative commons licence will also be selected.

IPR, RECRUITMENT & SUSTAINABILITY ISSUES

17. For IPR and recruitment issues, which are relatively low, see above Risk Assessment. See also Sustainability Plans addressed in **Section D: Impact**.

18. The project's close alignment with the University's research and teaching agenda will determine the long-term success – and sustainability – of the project. These issues are explored more fully in the Sustainability Plans in **Section D: Impact**.

SECTION D. Impact

IMPACT AND VALUE TO EXETER

19. CHARTER has been designed to address a recognised challenge at the University of Exeter: how do we provide the next generation of web tools needed to facilitate wide access to unique and rare collections in demand for research and teaching? Teaching demand for special collections – from Exeter and Cornwall campuses - is now pushing against the constraints of physical access (creating a conservation challenge). The repository model is our proposed solution to widen access to the many.

20. Stakeholder analysis reveals that the potential users will include students, academics and curators, as well as the Press Office, Web and Marketing Teams and the University's Development and Alumni Office. The highest value will be to academics and students. There are 11 taught courses (undergraduate and postgraduate) already positioned to integrate the popular culture content from the repository in to the curriculum on completion of CHARTER.

QUALITY, IMPACT AND VALUE TO WIDER HE AND RESEARCH COMMUNITIES

21. This project will create the next generation of tools and processes by which Exeter can *deliver its rare and unique collections to a wider audience via a sustainable virtual environment*. 'I felt I learnt more from the objects online' was one memorable student comment in response to using the e-learning tools on EVE. The virtual environment provides each user with time and space at their own PC to engage with the material objects in the collections.

22. Evidence already exists as to the underlying quality, significance and demand for Exeter's research collections: *'The Bill Douglas Centre is recognised as one of the most important resources anywhere in the world [...] As the numerous conferences on visual culture, Victorian studies and popular entertainment in the region attest, Devon has become the international locus for historical visualist research'* (Professor Dennis Denisoff, Ryerson University, 2007).

23. The artefacts selected for digitisation from the Bill Douglas Centre and supporting special collections of archives and rare books will be chosen by an interdisciplinary team of academics (English, Geography, History) with a view to ensuring the critical mass of popular culture digital content captured through CHARTER has the broadest possible appeal. The original artefacts will be in a range of media (lantern slide, prints, books, stereocards, playbills, optical toys) which in themselves tell part of the story of the dissemination and experience of popular culture. There are three inter-related narrative themes to guide the six selection panels: Empire and Imperialism; Science, Spectacle and Magic; Work, Home and Leisure.

24. The selection process will take account of and complement commercial online products like Nineteenth Century Online and Adam Matthews' Empire Online and Victorian Popular Culture Online. We take their commercial success as further evidence of the wide demand for the subject and period covered. Exeter's repository will be freely available to audiences that cannot afford these products.

SUSTAINABILITY PLANS & QUALITY OF THE DIGITISED RESOURCE

25. CHARTER is aligned to JISC strategy and it addresses a recognised internal institutional challenge as part of an ongoing process to move away from legacy databases towards use of standardised and interoperable open source infrastructure for digital artefacts and metadata. Its close alignment to the University's research and teaching mission is the most important factor in helping to determine its long-term success. CHARTER's sustainability plans embrace the following points:

- o Digital artefacts can help sustain originals by reducing the need for physical access
- o The sustainability and quality of the digitised resource is derived from the project's adherence to proven industry conventions and standards for file-naming, digitisation (TASI, JISC, AHDS, DCC), metadata (Dublin Core schema, drawing on the Open Archives Initiative, with local adaptations from MARC, ISAD(G), SPECTRUM and Library of Congress)
- o The repository will use Fedora software to enable interoperability with others. Fedora is an open source software product (<http://www.fedora-commons.org/>) and is shared freely. The repository will reside on a Linux server. The archival TIFFs will be stored on a separate server. Using Fedora software, the repository provides for OAI compatible harvesting for resource discovery.
- o Service agreements to govern the post-project support of the repository will be drawn up and agreed through CHARTER.
- o Systems support staff regularly monitor server traffic, guard against attacks, and apply widely accepted security practices to development and maintenance servers.
- o The project will help to develop and sustain the value placed on e-learning by the heritage and academic community. The e-learning module will be deposited in Jorum.

26. CHARTER will also be a means for practice and knowledge to be shared within a multi-disciplinary project team. This will increase the institutional knowledge base around the curation, preservation and access to digital assets. The dissemination and partnership plans outlined below in **Section E** have been designed to ensure this knowledge is shared widely throughout our respective communities of practice: curatorial, academic, digital curation, e-learning and web integration.

SECTION E. Partnership and Dissemination

OVERVIEW

27. As a project team we believe that our practices and outcomes will be more robust and have widest impact if we consider the project a learning process through which we build new and existing partnerships, evaluate and review continuously and share our findings – successes and failures – with the wider community of practice. There is no official external partner on the CHARTER project, but partnership working runs right through the project.

28. CHARTER employs a multi-disciplinary team. The internal partnerships are, on a micro-level, representative of key partnerships in the wider environment. Academic engagement is built in to CHARTER to ensure this key stakeholder group is active both in the processes and practices of the project and in its dissemination. This is because we know from experience that peer-to-peer endorsement by academics is the most critical factor in the take up of new resources and practices like e-learning.

29. The Project Team will also use established channels and networks to disseminate findings. This could include contribution of code to the Fedora software base on sourceforge.net as well as promotion through groups like CILIP Special Collections & Rare Book Group, Devon Museums Group, South West Society of Archivists and FE Colleges who regularly use the collections (Exeter College, Yeovil College, Plymouth College of Art and Design). Collaboration with the University College Falmouth is of special note. UCF and Exeter operate a shared campus and combined campus services in Cornwall. Their Learning Resource Centre is paying careful notice of Exeter's digital strategy and practices and what we do will inform their choices.

WORKING WITH JISC

30. Ahmed Abu-Zayed and Matt Newcombe (Project Team) have prior experience of working with JISC, as does Martin Myhill and Gary Stringer (both members of the Project Board). Jessica Gardner, Principal Investigator, consulted with Alastair Dunning during the planning stages of the proposal. She will be JISC's primary contact, but other members of the team will also discuss issues and problems with JISC and/or attend JISC meetings. CHARTER will be a means of developing the institutional experience and knowledge of JISC.

DISSEMINATION AND EVALUATION PRINCIPLES

31. We start from the principle that evaluation and dissemination (e.g. sharing ideas) are intrinsic to the success of the project and will form continuous themes running the length of CHARTER. Each project team member will document their methods and share problems and practices. The project will build up through its blog a public record of experience, in addition to formal deliverables like technical and user guidelines for establishing the repository. This knowledge can form case-studies for dissemination. Rather than hiding problems, we believe there is more to be gained from adopting an open and consultative approach through the blog and with the JISC.

32. Two significant sums have been identified in the budget for **dissemination** activities from May 2009 to September 2009:

- i. £5000.00 - 2 workshop or symposium days, one at Exeter and one in a central UK location. Profitable themes would be a) Heritage Collections and Digital curation b) Repository and E-Learning.
- ii. £5000.00 – to enable wide conference attendance by members of the project theme through existing networks (e.g. academic conferences, institutional Learning and Teaching Days, CILIP Special Collections & Rare Books Group, CILIP South West University and College Research Group, Digital Resources in the Humanities and the Arts).
- iii. No cost – publication via press release, university websites, blog, JISC reports, practitioner-led newsletters (e.g. SCONUL), and articles appearing beyond the end of the project.

33. The project plan will include formal means of evaluation, including SMART targets and user focus groups for usability testing of the repository and e-learning module. In addition, the project blog and record of meetings will form a continuous evaluative framework and narrative through the project, directly linked to dissemination aims. There will also be the formal process of reporting and evaluating to JISC.

34. Beyond CHARTER: The project does not exist in a vacuum. It sits within the University's strategic plans for research and teaching and it is aligned to JISC's digitisation strategy. The knowledge and processes and impact of CHARTER will extend beyond the life of the project and will inform the next phase of user-led digital developments at Exeter. Our aim will be to facilitate ongoing development and expansion of the repository (e.g. developing from its start-up as an image library to hold other digital artefacts like sound and film recordings) and exploration of mapping and migration between the repository and DS CALM software (for archives).

SECTION F. Budget

QUANTITATIVE AND QUALITATIVE BENEFITS FOR EXETER

35. The University of Exeter will fund 50% of CHARTER. This covers the full-cost of Academic Services staff seconded onto the project. JISC's contribution will meet the cost of new staff appointed to the project, hardware and the full cost of academic time. The estimated 'earnings' to the institution after full economic costing are around £12,000.00. This is a contingency fund which can be channelled into the project as part of its risk management strategy (e.g. to 'buy-in' the architects of EVE) and to help core service delivery in lieu of time diverted to the project. Other quantitative benefits include the scanning and photographic equipment which can be used to expand the content of the repository beyond the life of the project. Qualitative benefits to the institution are multiple, this being one of the attractions of the scheme: enhanced resources for teaching and learning, enhanced technical and project management skills, prestige and recognition for attracting JISC funding.

36. Budget – All appropriate costs are FEC indexed using HEI profiling and indices (adding inflation)

Directly Incurred Staff (Post, Grade, No. Hours & % FTE)	April 08 – March 09	April 09 – Sept 09	TOTAL £
Project Manager, Grade G, pt 39, 7.3 per day hours or 20% FTE for 12 months	£ 4726.08	£ 4726.08	£ 9,452.16
<u>Digitisation Officer</u> , Grade D, pt 14, 100% FTE 9 months	£ 5585.36	£ 11170.72	£ 16,756.08
<u>Digitisation Assistant</u> , Grade C, pt 6, 100% FTE over 9 months	4446.00	8892.00	13,338.00
Total Directly Incurred Staff (A)	£14,757.44	£24,788.80	£39,546.24
Non-Staff	April 08 – March 09	April 09 – Sept 09	TOTAL £
Travel and expenses (final figures show inflation added via TRAC costing)	£	£	£
<u>Travel & expenses from Cornwall to Exeter</u> to attend Selection Panels (academics) (4 trips of 210 round trip miles, plus lunch)	£298.49	-----	£298.49
<u>Travel & expenses from Exeter to London</u> to attend JISC days (up to five per project) (Standard Open Ticket is £179.00; £5.00 per trip expenses)	£473.47	£473.47	£946.94
<u>Travel & Expenses</u> from Exeter to Bristol (TASI Training – 4 x £25 for train & 4 x £5.00 expenses)	£123.51	--	£123.51
Hardware/software (inc VAT)	£	£	£
<u>New workstation x 2</u> for new members of directly incurred project staff (2 x desktop PC (2 x £550.00) x 2; 1 x networked colour laser jet printer (£240.00)	£1340.00	---	£1340.00
<u>Large format flatbed scanner</u>	£1500.00	---	£1500.00
<u>Slide scanner</u>	£800.00	---	£800.00
	£1500.00	--	£1500.00

<u>Digital camera</u> (raw format)		--	
	£300.00		£300.00
<u>Adobe Photoshop CS3 Extended</u> licence £150 x 2		--	
	£2,500.00		£2,500.00
<u>Server</u>		--	
<u>File Store (mirrored) – 1TB</u>	£4000.00		£4000.00
<u>Licensed back-up Provision for 12</u> <u>months – 1 TB</u>	£400.00		£400.00
Dissemination (final figures show <i>inflation added via TRAC costing</i>) <u>Workshops & Symposiums &</u> <u>Conferences</u>	£ ----	£ 10,292.83	£ 10,292.83
Evaluation <u>Book voucher rewards</u> for student focus group evaluation (£15 x 20) (i. FEDORA usability testing; ii. E- learning testing)	£ £90.00	£ £210.00	£ 300.00
Other (final figures show <i>inflation added via TRAC costing</i>) <u>Training</u> (up to 4xTASI courses)	£ 617.57	£ ---	£ 617.57
<u>Digital image capture – outsourcing</u> of 100 large items (no VAT) (£4.00 per unit)	£411.71	----	£411.71
Total Directly Incurred Non-Staff (B)	£14,354.75	£10,976.30	£25,331.05
Directly Incurred Total (C) (A+B=C)	£29,112.19	£35,765.10	£64,877.29
Directly Allocated	April 08 – March 09	April 09 – Sept 09	TOTAL £
Staff	£	£	£
Principal Investigator: Researcher 1 (PI) (10%FTE across 12 months / average 3.5 hours a week) (Dr Jessica Gardner, Head of Special Collections)	2588.64	2588.64	5177.28
Selection workflow: <u>Researcher 2</u> (Co Investigator) (5% FTE across 12 months – average 2 hours per week / 96 hours in total) (Phil Wickham, Curator)	987.23	987.23	1974.46
<u>Selection panels (via timesheets) –</u> <u>Oct 08 to March 09</u> (10 Academic Researchers participating – totally 50 hours input) Joanne Parker (English) – 8 hours Paul Young (English) – 4 hours Joe Kember (English) – 4 hours John Plunkett (English) – 8 hours Nicola Thomas (Geography) – 6 hours Jude Hill (Geography) – 4 hours James Ryan (Geography) – 4 hours Bruce Coleman (History) – 4 hours	50 hours in total on timesheets Total: 1556.37	--	1556.37

Richard Noakes (History) – 4 hours Richard Toye (History) – 4 hours			
Digitisation & Metadata workflow: <u>Researcher 3</u> (CI, Digital Assets Manager) (15% FTE for 12 months – average 3.5 hours per week) – Ahmed Abu-Zayed	3652.61	3652.61	7305.22
Digital Repository Workflow: October 08 to Jan 09 <u>Researcher 4</u> (CI, Head of Integration and Web Services) (10% FTE for 4 months – average 3.5 hours per week) – Sue Milward	2012.88	----	2012.88
<u>Researcher 5</u> (Systems Programmer / Web Developer) (100% FTE for 4 months – Kevin Evans	13,975.43	----	13,975.43
<u>Researcher 6</u> (Digital Storage Manager) – 36.5 hours / 1 week in total – Bill Edmunds	1213.49	---	1213.49
E-Learning Workflow: April 09-May 09 <u>Researcher 7</u> (CI - Head of E-Learning) (10% FTE for 2 months / average 3.5 hours per week) – Matt Newcombe	--	811.85	811.85
<u>Researcher 8</u> (Educational Technologist) 100% FTE for 2 months – Simon Tapper	--	5665.48	5665.48
<u>Researcher 9</u> (Academic) John Plunkett (Senior Lecturer, English) – 30 hours (timesheets)	--	933.82	933.82
Estates	£2046.5	£1380.5	£3427.00
Other	£ --	£--	£--
Directly Allocated Total (D)	£28,033.15	£16,020.13	£44,052.28
Indirect Costs (E)	£26,979.00	£18,189.00	£45,168.00
Total Project Cost (C+D+E)	£84,124.34	£69,974.23	£154,098.60
Amount Requested from JISC	£42,062.17	£34,987.07	£77,049.24
Institutional Contributions	£42,062.17	£34,987.19	£77,049.36
Institutional Contributions (must equal at least 50%)	JISC 50 %	Partners 50 %	Total 100%
No of FTE used to calculate indirect and estate charges and staff included	No FTES? 1.12	Which Staff? Researchers 1-9, plus Project Manager & academics named in 'selection' panels	

SECTION G. Previous Experience of the Project Team

37. CHARTER pulls together a strong multi-disciplinary team. Unless otherwise stated, people listed below will be seconded to the project from the Academic Services division.

38. Principal Investigator – Dr Jessica Gardner is Head of Special Collections at the University of Exeter. Her qualifications and experience twin research and heritage collection management across 13 years in HE special collections. She is regularly invited to speak at conferences (e.g. CILIP Rare Books Conference in 2006; Manuscripts Matter at British Library in 2006, Learning & Teaching Day at University of the Arts in 2007, CURL Symposium 2008). At Exeter, she's had lead roles in a series of projects funded by Wellcome, AHRC (e.g. EVE project) and the Pilgrim Trust and Esmée Fairbairn Foundation.

39. Project Manager – to be advertised internally. The Project Manager is likely to be appointed from the University's Project Office and will be qualified and experienced in PRINCE2.

40. Co-Investigator (CI) Selection Workflow Manager – Philip Wickham is the Curator of the Bill Douglas Centre museum at the University of Exeter. He joined the Special Collections team in January 2008 following 17 years at the British Film Institute, where he was Curator in Television. He is a published researcher and lecturer in screen studies, with regular conference participation. Since joining Exeter he has established the Screen Studies South West network, with representation from all relevant collections and research communities in the region.

41. CI - Digitisation & Metadata Workflow Manager – Ahmed Abu-Zayed is the Digital Assets Manager of the University of Exeter. He has a BA in Library Science and Archives and an MSc in Information Management. Recent projects: JISC ITT: Review of User Requirements for Digitised Resources in Islamic Studies (March to May 2008).

42. CI - Repository Workflow Manager – Sue Milward is Head of Integration and Web Services at the University of Exeter. She is a committed, academically qualified ICT and PRINCE2 project manager with extensive strategic management experience and technical awareness. She has over 10 years experience of leading technical teams to deliver high quality management information systems using emergent technology.

43. Repository Workflow - Kevin Evans (BA, MA) is a Web Services Developer on the Integration and Web Services Team. Since 2004/5 he has been the lead developer on the MyExeter Portal and he has extensive directly relevant skills and experience as a web developer (e.g. J2EE JAVA environment, JAVA/JSP, XML, CSS, SOAP).

44. Digital Storage Manager – Bill Edmund, Dip. Comp. (Open), BSc Hons (Open) is the Enterprise Systems Team Leader at the University with responsibility for the University's two data centres. He has worked on a number of major systems projects (including SWISH - South West Implementation of Shibboleth – funded by JISC).

45. CI - E-Learning Workflow Manager – Matt Newcombe is Head of E-Learning at the University of Exeter and previously worked as a Senior Education Technologist at the University of Plymouth managing a team of 15 Learning Technologists. He regularly gives conference papers in his subject area. In 2006/7 he was Project Manager for the Centre of Excellence in Professional Placement Learning CETL Mobile Learning Project (£240,000 HEFCE funding) and he is the project lead for a Higher Education Agency-funded e-learning Observatory project, running July 2008-July 2009.

46. E-Learning Workflow – Simon Tapper is an Educational Technologist on the University's E-Learning Team and has been working at the University of Exeter since 2003. Simon has been involved with the development of e-learning resources across the University.

47. Digitisation Officer (Grade D) (From January 2009 for 9 months). To be advertised externally. This post-holder will be responsible for supervising the digitisation workflow under direct line management of the Digital Assets Manager. (S)he will be responsible for creating the

metadata, quality assurance and will undertake some of the image capture work. Previous experience of image capture and relevant metadata standards an advantage.

48. Digitisation Assistant (Grade C) (From January 2009 for 9 months). To be advertised externally. This post-holder will undertake the bulk of the image capture and file-naming work on the project. Previous experience of digitisation will be an advantage.

SECTION H. Supporting Letter (see over)



ACADEMIC SERVICES

DIRECTOR
University Library
Stocker Rd
Exeter, UK
EX4 4PT

Telephone +44 (0)1392 263869
Fax +44 (0)1392 263871
Email m.i.shoebridge@ex.ac.uk

JISC
Northavon House
Coldharbour Lane
Bristol
BS16 1QD

18 July 2008

JISC CIRCULAR 09/08: Enhancing Digital Resources

I am pleased to offer my full support, on behalf of the University of Exeter, to the enclosed bid led by Dr Jessica Gardner in response to this call from JISC. The University of Exeter is very well-placed to undertake this project given the significance of its Special Collections (including the Bill Douglas Centre museum) and its strategic plans to transform access to these collections via the creation of an online, open access repository environment. The proposed team includes colleagues with very strong reputations in the fields of heritage collection management, web-integration and systems, digitisation and e-learning. The team have long-standing and proven expertise in the successful delivery of similar projects (e.g. JISC, AHRC) and will be working in close partnership with the academic community to ensure the project strategy is demand led by a key group of its end-users. Where necessary, this portfolio will be supported by other colleagues reflecting Exeter's sustained position as a leading, research-led institution in the UK.

Yours sincerely,

A handwritten signature in black ink that reads "Michele Shoebridge".

Michele Shoebridge
Director of Academic Services