

Collaboration to Clarify the Cost of Curation



MS7—Functioning Information Dependency Profile—Annex

<i>Deliverable Lead:</i>	The Danish National Archives (DNA)
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Dissemination Level		
PU	Public	
PP	Restricted to other programme participants (including the Commission Services)	✓
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	

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0.01	27 June 2013	First draft post separation from main document	PLSS
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The 4C participants are:

Participant organisation name	Short Name	Country
Jisc	JISC	UK
Det Kongelige Bibliotek, Nationalbibliotek Og Kobenhavns Universitetsbibliotek	KBDK	DK
Instituto de Engenharia de Sistemas e Computadores, Investigacao e Desenvolvimento em Lisboa	INESC-ID	PT
Statens Arkiver	DNA	DK
Deutsche Nationalbibliothek	DNB	DE
University of Glasgow	HATII-DCC	UK
UK Data Archive (University of Essex)	UESSEX	UK
Keep Solutions LDA	KEEPS	PT
Digital Preservation Coalition Limited by Guarantee	DPC	UK
Verein Zur Forderung Der It-Sicherheit In Osterreich	SBA	AT
The University of Edinburgh	UEDIN-DCC	UK
Koninklijke Nederlandse Akademie van Wetenschappen -KNAW	KNAW-DANS	NL
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External Links

Note: Many of these documents are dynamic and will be changing throughout the lifetime of the project. Where possible a link has been provided to a snapshot of the document referred to at the time of publication along with a link to current version.

Link	URL
Project Website	Current http://4cproject.eu/
Project glossary	Snapshot http://4cproject.net/?attachment_id=302
	Current * https://docs.google.com/spreadsheet/ccc?key=0Au2-xr2TAgEKdEJZN2tRZmRzcEplclBtNkMtZ3g1aE
Dependency Registry	Snapshot http://4cproject.net/?attachment_id=316
Template for task descriptions	Snapshot http://4cproject.net/?attachment_id=317
	Current https://docs.google.com/file/d/0BwAzkZ58mjGbZVJPUWY5enozTkE/edit?usp=sharing

*Accessible only to collaborators

Annex 1: Snapshot of the Dependency Registry

The Dependency Registry is dynamic and will be updated as the project proceeds and as new dependencies emerge or known dependencies are refined. The following is a snapshot of the Dependency Registry as of mid-June 2013 (M5):

In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
?	4C project - the4cproject@googlegroups.com	IO2.6.6.7 - O15 - CCEX specification development	T2.6.6 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
?	T2.6.6 - William Kilbride - william@dpconline.org	IO2.6.6.6 - I24 - management/download from exchange	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
?	T2.6.6 - William Kilbride - william@dpconline.org	IO2.6.6.5 - I23 - advertising of exchange	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
?	T2.6.6 - William Kilbride - william@dpconline.org	IO2.6.6.4 - I22 - implementation and testing of exchange	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
?	T2.6.6 - William Kilbride - william@dpconline.org	IO2.6.6.3 - I21 - web design team to develop exchange	Web designers	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
?	T2.6.6 - William Kilbride - william@dpconline.org	IO2.6.6.2 - I20 - Consultation with stakeholders	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.7.3 - O12 – Quarterly Report on Communications Activities	T2.6.7 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.5.6 - O13 – contribution to validation of all other project deliverables	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.9 - O7 - Identification of subjects of articles	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.4 - William Kilbride - william@dpconline.org	IO2.6.4.8 - I12 - contact/submission to journal press offices	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.4 - William Kilbride - william@dpconline.org	IO2.6.4.7 - I11 – authorship of press releases	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.4 - William Kilbride - william@dpconline.org	IO2.6.4.6 - I10 - design input, printing/production and delivery	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.4 - William Kilbride - william@dpconline.org	IO2.6.4.5 - I9 - authorship of articles and copy	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.4 - d2.6.7d pop-up banner/stand dressing	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.3 - d2.6.7c project flyer/leaflets	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.2 - d2.6.7b project poster	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.11 - O9 - Project Team approval	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.10 - O8 - identification of materials required	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		

In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.4.1 - d2.6.7a journal articles/briefing papers/conference papers	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.6.3.5 - O5 – contribution to validation of all other project outputs and reports (especially tasks in WP 3, 4 and 5)	T2.6.3 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.3 - William Kilbride - william@dpconline.org	IO2.6.3.2 - d2.6.3b blog posts	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.2 - William Kilbride - william@dpconline.org	IO2.6.2.4 - I5 - progress or activity updates from Project Partners	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	T2.6.3 - William Kilbride - william@dpconline.org	IO2.6.2.3 - I4 – D2.6 4C Project Communications Plan	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.5.3.4 - O7 Contribution to review of all public deliverables – D1.1, D 1.2, D2.1, D2.2, D2.3, D2.4, D2.5, D2.6, D2.7, D2.8, D3.1, D3.2, D3.3, D4.1, D4.2, D4.3, D4.4, D4.5, D5.1, D5.2	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
Iterative	4C project - the4cproject@googlegroups.com	IO2.4.4.1 - O2.2.4.1 – Up to date CRM	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
Iterative	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.8 - Information about stakeholders for the Final Stakeholder Report (D2.3)	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.8 - Information about stakeholders for the Final Stakeholder Report (D2.3)	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.2.8 - Information about stakeholders for the Final Stakeholder Report (D2.3)	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
Iterative	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.7 - Feedback about Roadmap for the Roadmap group?	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.7 - Feedback about Roadmap for the Roadmap group?	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	WP5 - Neil Grindley - n.grindley@jisc.ac.uk	IO2.3.2.7 - Feedback about Roadmap for the Roadmap group?	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
Iterative	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.6 - Information/Feedback for the Enhancement group?	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.6 - Information/Feedback for the Enhancement group?	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	WP4 - - Raivo Ruusalepp - raivo@eba.ee	IO2.3.2.6 - Information/Feedback for the Enhancement group?	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
Iterative	WP3 - the4cprojectWP3@googlegroups.com	IO2.3.2.5 - Information relating to digital curation cost determinants for the Assessment group	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		

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Iterative	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO2.3.2.4 – Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
Iterative	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.4 – Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.4 – Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
Iterative	T2.5.3 - William Kilbride - william@dpconline.org	D2.2 - Maintain Register of Stakeholder & Stakeholder Initiatives	T2.2 - Kevin Ashley - kevin.ashley@ed.ac.uk	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M01 - Feb 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS03 - Early Project Web Presence	T2.6 - William Killbride - william@dpconline.org	DoW		
M01 - Feb 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS02 - Project Kickoff Meeting	T1.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M01 - Feb 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS01 - Establish Project Management methods	T1.1 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M01 - Feb 13	Task leaders, all - ?	IO3.1.1.2 - Distribution of template for Task-leaders	T3.1 - Alex Thirifays - alt@sa.dk	T3.1_Task description for T3.1_Information Dependency Profile_3_2013_April_30_T3.1		
M01 - Feb 13	4C project - the4cproject@googlegroups.com	IO2.6.2.2 - d2.5.2b hashtag	T2.6.2 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	4C project - the4cproject@googlegroups.com	IO2.6.2.1 - d2.6.2a Twitter account	T2.6.2 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	4C project - the4cproject@googlegroups.com	IO2.6.1.6 - O3 - contribution to developed website D2.7	T2.6.1 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	4C project - the4cproject@googlegroups.com	IO2.6.1.5 - O2 - Creation of website	T2.6.1 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	4C project - the4cproject@googlegroups.com	IO2.6.1.4 - O1 - Project Partner review of website content	T2.6.1 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	T2.6.1 - William Kilbride - william@dpconline.org	IO2.6.1.3 - I3 – Supply of 4C Project logo	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	T2.6.1 - William Kilbride - william@dpconline.org	IO2.6.1.2 - I2 - Supply of 4C partner links	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	T2.6.1 - William Kilbride - william@dpconline.org	IO2.6.1.1 - I1 - Research website solutions	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M01 - Feb 13	4C project - the4cproject@googlegroups.com	d2.6.1 Preliminary Website	T2.6.1 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M02 - March 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS04 - Form Advisory Board	T1.2 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M02 - March 13	4C project - the4cproject@googlegroups.com	IO4.1.1.2 - Glossary entry	T4.1.1 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		

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M02 - March 13	4C project - the4cproject@googlegroups.com	IO4.1.1.1 - Working definition(s) in the glossary	T4.1.1 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		
M02 - March 13	T3.1 - Alex Thirifays - alt@sa.dk	IO3.1.1.1 - Input from Task leaders to the Information Dependency Profile (IDP)	Task leaders, all	T3.1_Task description for T3.1_Information Dependency Profile_3_2013_April_30_T3.1		
M02 - March 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO2.1.1.1 - Running project collaboration platform	T1.1 - Paul Stokes - p.stokes@jisc.ac.uk	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M03 - April 13	Brian Lavoie	IO4.2.1.1 - Working document phase I review/directions	T4.2.1 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M03 - April 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO4.2.1.1 - Working document phase I review/directions	T4.2.1 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M03 - April 13	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO4.2.1.1 - Working document phase I review/directions	T4.2.1 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M03 - April 13	T4.1 - Raivo Ruusalepp - raivo@eba.ee	IO4.2.1.1 - Working document phase I review/directions	T4.2.1 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M03 - April 13	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.1.1 - Working document phase I review/directions	T4.2.1 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M03 - April 13	T3.2.1 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.1.1 - Meeting with APARSEN and 4C Coordinator to obtain detailed information	APARSEN project - Kirnn Kaur - Kirnn.Kaur@bl.uk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M03 - April 13	4C project - the4cproject@googlegroups.com	IO3.1.2.1 - Master document that holds all the dependencies	T3.1 - Alex Thirifays - alt@sa.dk	T3.1_Task description for T3.1_Information Dependency Profile_3_2013_April_30_T3.1		
M03 - April 13	T2.3.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.1.1 - Input which information are needed from which stakeholders in WP 3 and WP 4	T3.1 - Alex Thirifays - alt@sa.dk	T2.3-information-dependencies_T3.1		
M03 - April 13	T2.3.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.1.1 - Input which information are needed from which stakeholders in WP 3 and WP 4	WP3 - the4cprojectWP3@googlegroups.com	T2.3-information-dependencies_T3.1		
M03 - April 13	T2.3.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.1.1 - Input which information are needed from which stakeholders in WP 3 and WP 4	WP4 - - Raivo Ruusalepp - raivo@eba.ee	T2.3-information-dependencies_T3.1		
M03 - April 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO2.1.3.2 - A set of questions to be included in the consultation	4C project - the4cproject@googlegroups.com	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M03 - April 13	T2.1.3 - Miguel Ferreira - mferreira@keep.pt	IO2.1.3.1 - A list of stakeholder contacts and mailing lists addresses provided by the previous subtask.	T2.1.2 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M03 - April 13	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	IO2.1.2.2 - A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		

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M03 - April 13	T3.3 - Hervé L'Hours - herve@essex.ac.uk	IO2.1.2.2 - A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M03 - April 13	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	IO2.1.2.2 - A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M03 - April 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO2.1.2.1 - Person contacts and mailing list addresses	4C project - the4cproject@googlegroups.com	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M03 - April 13	4C project - the4cproject@googlegroups.com	IO2.6.3.1 - d2.6.3a schedule of blog posts	T2.6.3 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M04 - May 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS06 - Semi-Structured Interview Template	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M04 - May 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS05 - Advisory Board 1	T1.2 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M04 - May 13	Advisory Board	IO4.2.2.1 - Working document draft 1 ESRM	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M04 - May 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO4.2.2.1 - Working document draft 1 ESRM	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M04 - May 13	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO4.2.2.1 - Working document draft 1 ESRM	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M04 - May 13	T4.1 - Raivo Ruusalepp - raivo@eba.ee	IO4.2.2.1 - Working document draft 1 ESRM	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M04 - May 13	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.2.1 - Working document draft 1 ESRM	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M04 - May 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO4.1.2.4 - Discussions	T4.1.2 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		
M04 - May 13	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO4.1.2.4 - Discussions	T4.1.2 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		
M04 - May 13	T4.1.2 - Raivo Ruusalepp - raivo@eba.ee	IO4.1.2.3 - State of the art analysis	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T4_1 Task descriptions for IDP_T3.1		
M04 - May 13	T4.1.2 - Raivo Ruusalepp - raivo@eba.ee	IO4.1.2.2 - Glossary	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T4_1 Task descriptions for IDP_T3.1		
M04 - May 13	4C project - the4cproject@googlegroups.com	IO4.1.2.1 - Preliminary list / taxonomy of indirect economic determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		
M04 - May 13	WP3 - the4cprojectWP3@googlegroups.com	IO4.1.2.1 - Preliminary list / taxonomy of indirect economic determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		
M04 - May 13	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.1.3 - Draft description of existing models for the Final Report's section "Economic Models"	T3.2.1 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M04 - May 13	T3.2.3 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.1.2 - List and summary of economic models that will be evaluated	T3.2.1 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		

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M04 - May 13	4C project - the4cproject@googlegroups.com	IO3.1.2.2 - Draft of the Information Dependency Profile (IDP) for audit	T3.1 - Alex Thirifays - alt@sa.dk	T3.1_Task description for T3.1_Information Dependency Profile_3_2013_April_30_T3.1		
M04 - May 13	4C project - the4cproject@googlegroups.com	IO2.2.2.1 - O2.2.2.1 – populated CRM with stakeholders	T2.2.2 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M04 - May 13	4C project - the4cproject@googlegroups.com	IO2.2.1.5 - O2.2.1.3 – user accounts created for selected 4C project staff	T2.2.1 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M04 - May 13	4C project - the4cproject@googlegroups.com	IO2.2.1.4 - O2.2.1.2 – installation of CRM	T2.2.1 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M04 - May 13	4C project - the4cproject@googlegroups.com	IO2.2.1.3 - O2.2.1.1 – short summary of options and recommendation for mechanism to capture stakeholder information	T2.2.1 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M04 - May 13	T2.2.1 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.2.1.2 - I2.2.1.2 – input from colleagues at DCC on use of SugarCRM	External	T2.2.-information-dependencies_T3.1		
M04 - May 13	T2.2.1 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.2.1.1 - I2.2.1.1 – input from T2.6 on website development and costs of related CRM options	T2.6 - William Kilbride - william@dpconline.org	T2.2.-information-dependencies_T3.1		
M04 - May 13	T2.2.2 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.1.2.2 - A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.2.-information-dependencies_T3.1		
M04 - May 13	Management Coordination Group	IO1.5.1.1 - d1.5.1 A document and checklist	T1.5 - Neil Grindley - n.grindley@jisc.ac.uk	T1_5 Task Description for IDP_T3.1		
M04 - May 13	T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T3.2_TaskDescriptionT3_2Revised270313_T3.1	Timing issue: D4.1 is due in M6, but it is needed in M4 by T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	Reported to T3.2 who will ask Raivo to review the evaluation method in M5. Raivo has resources allocated to T3.2.
M04 - May 13	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_2 Task descriptions for IDP_T3.1	Timing issue: D4.1 is due in M6, but it is needed in M4 by T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	
M04 - May 13	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.2.2 - Extensible framework interview template	T2.3.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		

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M05 - June 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS07 - Functioning Information Dependency Profile (IDP)	T3.1 - Alex Thirifays - alt@sa.dk	T3.1_Task description for T3.1_Information Dependency Profile_3_2013_April_30_T3.1		
M05 - June 13	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.3.3 - I4 - T3.2 (Evaluation of cost models and needs & gap analysis – emerging indications of a need or a gap for a conceptual modeling approach)	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.3.2 - I3 - T2.3 (Engagement with stakeholders – if any views forthcoming about sustainability issues and opinions on requirements and demand for a model)	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO4.2.3.1 - Working document draft 2 ESRM	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO4.2.3.1 - Working document draft 2 ESRM	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO4.2.3.1 - Working document draft 2 ESRM	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T3.3 - Hervé L'Hours - herve@essex.ac.uk	IO4.2.3.1 - Working document draft 2 ESRM	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T4.1 - Raivo Ruusalepp - raivo@eba.ee	IO4.2.3.1 - Working document draft 2 ESRM	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T4.2.4 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.3.1 - Working document draft 2 ESRM	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T4.1.3 - Raivo Ruusalepp - raivo@eba.ee	IO4.1.3.2 - Interaction	T4.1 - Neil Grindley - n.grindley@jisc.ac.uk	T4_1 Task descriptions for IDP_T3.1		
M05 - June 13	T4.1.3 - Raivo Ruusalepp - raivo@eba.ee	IO4.1.3.1 - Interaction	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T4_1 Task descriptions for IDP_T3.1		
M05 - June 13	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.2.4 - Draft description of the evaluation method for the Final Report's section "Evaluation Method"	T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M05 - June 13	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.2.3 - Draft description of stakeholders' needs for the Final Report's section "Stakeholders' Needs"	T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M05 - June 13	T3.2.3 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.2.2 - D3.2.2.3 Evaluation plan and procedure	T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M05 - June 13	T3.2.3 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.2.1 - D3.2.2.2 Evaluation tools and schema outline	T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M05 - June 13	T3.1 - Alex Thirifays - alt@sa.dk	IO3.1.3.3 - Comments on d2 - Draft of the Information Dependency Profile (IDP) for audit	4C project - the4cproject@googlegroups.com	T3.1_Task description for T3.1_Information Dependency Profile_3_2013_April_30_T3.1		
M05 - June 13	T2.6.3 - William Kilbride - william@dpconline.org	IO2.6.3.3 - O3 - contribution to Project Communications Plan D2.5	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		

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M05 - June 13	T2.6.4 - William Kilbride - william@dpconline.org	IO2.6.2.3 - I4 – D2.6 4C Project Communications Plan	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M05 - June 13	T2.6.2 - William Kilbride - william@dpconline.org	IO2.6.2.3 - I4 – D2.6 4C Project Communications Plan	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M05 - June 13	T2.5.3 - William Kilbride - william@dpconline.org	IO2.5.3.3 - I8 Initial communications (d2.5.1-5)	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.3.1 - d2.5.7 Email to all members sharing the plan	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.2.8 - O6 Finalized plan	T2.5.2 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.2.7 - O5 Comments on draft plan	T2.5.2 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.2.6 - O4 Draft communications plan	T2.5.2 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.2 - William Kilbride - william@dpconline.org	IO2.5.2.5 - I7 Inputs to understand and represent WP 3, 4 and 5	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.2 - William Kilbride - william@dpconline.org	IO2.5.2.4 - I6 Project Quality plan (T1.5)	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.3 - William Kilbride - william@dpconline.org	IO2.5.2.4 - I6 Project Quality plan (T1.5)	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.2 - William Kilbride - william@dpconline.org	IO2.5.2.3 - I5 Alignment with project management methods (T1.1)	T1.1 - Neil Grindley - n.grindley@jisc.ac.uk	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.3 - William Kilbride - william@dpconline.org	IO2.5.2.3 - I5 Alignment with project management methods (T1.1)	T1.1 - Neil Grindley - n.grindley@jisc.ac.uk	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.2 - William Kilbride - william@dpconline.org	IO2.5.2.2 - I4 comments from partners involved in (T2.1, 2.2, 2.3)	WP2 - 4c-wp2-@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.1 - William Kilbride - william@dpconline.org	IO2.5.2.1 - d2.5.6 first draft of communications plan	T2.5.2 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.6 - William Kilbride - william@dpconline.org	IO2.5.1.9 - O3 contribution to developed website D2.7	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.6 - William Kilbride - william@dpconline.org	IO2.5.1.8 - O2 contribution to communications report D2.6	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5 - William Kilbride - william@dpconline.org	IO2.5.1.7 - O1 contribution to communications plan D2.5	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.1 - William Kilbride - william@dpconline.org	IO2.5.1.6 - i2 other communications plans	External	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.2 - William Kilbride - william@dpconline.org	IO2.5.1.6 - i2 other communications plans	External	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.1.5 - d.2.5.5 early blog postings	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.1.4 - d.2.5.4 press release announcing start of project	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.1.3 - d2.5.3 briefing note on project	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		

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M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.1.2 - d.2.5.2 twitter account and twitter traffic	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.1.1 - d2.5.1 early website	T2.5.1 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.1 - Miguel Ferreira - mferreira@keep.pt	IO2.1.3.3 - A template on where to pour the results of this subtask	T3.1 - Alex Thirifays - alt@sa.dk	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M05 - June 13	T1.5.2 - Neil Grindley - n.grindley@jisc.ac.uk	IO1.5.2.2 - I1 – T3.1 (check all forms of public project output)	T3.1 - Alex Thirifays - alt@sa.dk	T1_5 Task Description for IDP_T3.1		
M05 - June 13	Task leaders, all - ?	IO1.5.2.1 - d1.5.2 A shared table	T1.5 - Neil Grindley - n.grindley@jisc.ac.uk	T1_5 Task Description for IDP_T3.1		
M05 - June 13	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_2 Task descriptions for IDP_T3.1		
M05 - June 13	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	D2.5 - Project Communication Plan	T2.5 - William Killbride - william@dpconline.org	T2.2.-information-dependencies_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	D2.5 - Project Communication Plan	T2.5.2 - William Killbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.3 - William Kilbride - william@dpconline.org	D2.5 - Project Communication Plan	T2.5.2 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.4 - William Kilbride - william@dpconline.org	D2.5 - Project Communication Plan	T2.5.2 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.4.2 - d2.5.10 quarterly report 1	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.12 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	4C project - the4cproject@googlegroups.com	IO2.5.4.1 - d2.5.9 reporting template	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M05 - June 13	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.2.3 - Requirements / checklists to facilitate quantitative information gathering (to be set out in T3.1)	T3.1 - Alex Thirifays - alt@sa.dk	T2.3-information-dependencies_T3.1		
M05 - June 13	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.2.1 - Stakeholder matrix (may come from Communications Plan or T2.1?)	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.3-information-dependencies_T3.1		
M05 - June 13	T2.3.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.3.2.1 - Stakeholder matrix (may come from Communications Plan or T2.1?)	T2.5 - William Killbride - william@dpconline.org	T2.3-information-dependencies_T3.1		
M05 - June 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.5 - Project Communication Plan	T2.5 - William Killbride - william@dpconline.org	DoW		
M06 - July 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS09 - Trial of Draft Economic Sustainability Reference Model	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T2.4-information-dependencies_T3.1		
M06 - July 13	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	MS09 - Trial of Draft Economic Sustainability Reference Model	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T2.4.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	MS09 - Trial of Draft Economic Sustainability Reference Model	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T2.4-information-dependencies_T3.1		

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M06 - July 13	T3.3.2 - Hervé L'Hours - herve@essex.ac.uk	MS09 - Trial of Draft Economic Sustainability Reference Model	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M06 - July 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS08 - Project Meeting 2	T1.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO4.3.1.3 - Outputs to other tasks: updates to definitions of key terms	T4.3.1 - Raivo Ruusalepp - raivo@eba.ee	T4_3 Task Description for IDP_ver_2.1_T3.1		
M06 - July 13	T4.3.1 - Raivo Ruusalepp - raivo@eba.ee	IO4.3.1.2 - Inputs from other tasks: T4.1 and T3.1 – definitions and glossary entries of key terms	T3.1 - Alex Thirifays - alt@sa.dk	T4_3 Task Description for IDP_ver_2.1_T3.1		
M06 - July 13	T4.3.1 - Raivo Ruusalepp - raivo@eba.ee	IO4.3.1.2 - Inputs from other tasks: T4.1 and T3.1 – definitions and glossary entries of key terms	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_3 Task Description for IDP_ver_2.1_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO4.3.1.1 - D4.3.1 Summary of publicly available cost data and audit cost models (first iteration of the deliverable report)	T4.3.1 - Raivo Ruusalepp - raivo@eba.ee	T4_3 Task Description for IDP_ver_2.1_T3.1		
M06 - July 13	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO4.2.4.1 - d4.2.4 – Public draft document for release to community on a trial basis	T4.2.4 - Neil Grindley - n.grindley@jisc.ac.uk	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T4.2.4 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.3.3 - I4 - T3.2 (Evaluation of cost models and needs & gap analysis – emerging indications of a need or a gap for a conceptual modeling approach)	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T4.2.4 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.2.3.2 - I3 - T2.3 (Engagement with stakeholders – if any views forthcoming about sustainability issues and opinions on requirements and demand for a model)	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.6.5.5 - O12 - project partner approval	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.6.5.4 - O11 - Website specification development	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T2.6.5 - William Kilbride - william@dpconline.org	IO2.6.5.3 - I15 - management and operation	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T2.6.5 - William Kilbride - william@dpconline.org	IO2.6.5.2 - I14 - information migration	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T2.6.5 - William Kilbride - william@dpconline.org	IO2.6.5.1 - I13 - Web designer site creation	Web designers	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.6.2.5 - O10 - contribution to Report on Communications Activities D2.6	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T2.6.5 - William Kilbride - william@dpconline.org	IO2.6.2.3 - I4 – D2.6 4C Project Communications Plan	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.5.4.3 - d2.5.11 quarterly report 2	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		

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M06 - July 13	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.13 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.5.3.2 - d2.5.8 Agenda item in project meeting about the plan	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.1.3.4 - A report on the results of the consultation in the format defined by the Information Dependency Profile (T3.1)	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M06 - July 13	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.1.3.4 - A report on the results of the consultation in the format defined by the Information Dependency Profile (T3.1)	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.2.-information-dependencies_T3.1		
M06 - July 13	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.1.3.4 - A report on the results of the consultation in the format defined by the Information Dependency Profile (T3.1)	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.2.-information-dependencies_T3.1		
M06 - July 13	T3.2.1 - Ulla Bøgvad Kejser - ubk@kb.dk	IO2.1.1.2 - O2.1.1.1 - A registry of publications and projects in the field of cost modeling in digital preservation. This output feeds into WP3.	T2.1.1 - Miguel Ferreira - mferreira@keep.pt	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M06 - July 13	WP3 - the4cprojectWP3@googlegroups.com	IO2.1.1.2 - O2.1.1.1 - A registry of publications and projects in the field of cost modeling in digital preservation. This output feeds into WP3.	T2.1.1 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M06 - July 13	T1.5.2 - Neil Grindley - n.grindley@jisc.ac.uk	IO1.5.2.3 - I2 – All task leaders (to check their outputs have been correctly listed)	Task leaders, all - ?	T1_5 Task Description for IDP_T3.1		
M06 - July 13	T3.3.2 - Hervé L'Hours - herve@essex.ac.uk	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M06 - July 13	T4.2.4 - Neil Grindley - n.grindley@jisc.ac.uk	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T4.4.1 - Diogo Proença - diogobcp@gmail.com	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4.4_Task Description for T4.4_T3.1		
M06 - July 13	T4.4.2 - Diogo Proença - diogobcp@gmail.com	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4.4_Task Description for T4.4_T3.1		
M06 - July 13	T4.4.3 - Diogo Proença - diogobcp@gmail.com	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4.4_Task Description for T4.4_T3.1		
M06 - July 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1.3 - Raivo Ruusalepp - raivo@eba.ee	T4_1 Task descriptions for IDP_T3.1		
M06 - July 13	T2.4.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1.3 - Raivo Ruusalepp - raivo@eba.ee	T2.4-information-dependencies_T3.1		
M06 - July 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.7 - Developed Project Website	T2.6 - William Killbride - william@dpconline.org	DoW		

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M06 - July 13	4C project - the4cproject@googlegroups.com	D2.7 - Developed Project Website	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.7 - Developed Project Website	T2.6.5 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T3.2_TaskDescriptionT3_2Revised270313_T3.1	Timing issue: D2.1 is due in M6, but it is needed in M4 by T3.2.2 - Ulla Bøgvad Kejser - ubk@kb.dk	Reported to T3.2
M06 - July 13	T4.2.2 - Neil Grindley - n.grindley@jisc.ac.uk	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T2.5.1 - William Kilbride - william@dpconline.org	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M06 - July 13	T2.5.2 - William Kilbride - william@dpconline.org	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M06 - July 13	T2.5.3 - William Kilbride - william@dpconline.org	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M06 - July 13	T4.2.3 - Neil Grindley - n.grindley@jisc.ac.uk	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.1 Baseline study of stakeholders and stakeholder initiatives-0.5_T3.1		
M06 - July 13	T2.4.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.4-information-dependencies_T3.1		
M06 - July 13	T2.6.4 - William Kilbride - william@dpconline.org	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T2.6.6 - William Kilbride - william@dpconline.org	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M06 - July 13	T4.2.4 - Neil Grindley - n.grindley@jisc.ac.uk	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T4_2 Task descriptions for IDP_T3.1		
M06 - July 13	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.2.2 - Extensible framework interview template	T2.3.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.2.3.3 - O2.2.3.3 – up to date, public list of stakeholder institutions that can be disseminated via the 4C website	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M06 - July 13	4C project - the4cproject@googlegroups.com	IO2.2.3.2 - O2.2.3.2 – data management plan for stakeholder information held within CRM	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M06 - July 13	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.2.3.2 - O2.2.3.2 – data management plan for stakeholder information held within CRM	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M06 - July 13	External	IO2.2.3.1 - O2.2.3.1 – set of terms and conditions for contacts who provide us	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		

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		with contact data				
M06 – July 13	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.2.3.1 - O2.2.3.1 – set of terms and conditions for contacts who provide us with contact data	T2.2.3 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	T2.2.-information-dependencies_T3.1		
M07 - Aug 13	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.3.2 - Draft description of the results for the Final Reports' section "Gap Analysis"	T3.2.3 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M07 - Aug 13	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.2.3.1 - Individual result reports for all the evaluated models	T3.2.3 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M08 - Sep 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS11 - Outreach Workshop 1	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		
M08 - Sep 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS10 - Focus Group Meeting 1	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M08 - Sep 13	4C project - the4cproject@googlegroups.com	IO3.2.4.1 - Draft Report for review by TG3.2 and identified stakeholders in WP3. Comments from 4C	T3.2.4 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M09 - Oct 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS12 - Draft Cost Models Study / Needs & Gap Analysis	T3.2.4 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M09 - Oct 13	T2.4.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	MS12 - Draft Cost Models Study / Needs & Gap Analysis	T3.2.4 - Ulla Bøgvad Kejser - ubk@kb.dk	T2.4-information-dependencies_T3.1		
M09 - Oct 13	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	MS12 - Draft Cost Models Study / Needs & Gap Analysis	T3.2.4 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M09 - Oct 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	MS12 - Draft Cost Models Study / Needs & Gap Analysis	T3.2.4 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M09 - Oct 13	4C project - the4cproject@googlegroups.com	IO4.3.2.1 - D4.3.2 Summary of cost data collected through survey (second iteration of the deliverable report)	T4.3.2 - Raivo Ruusalepp - raivo@eba.ee	T4_3 Task Description for IDP_ver_2.1_T3.1		
M09 - Oct 13	4C project - the4cproject@googlegroups.com	IO2.5.4.4 - d2.5.12 quarterly report 3	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M09 - Oct 13	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.14 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M09 - Oct 13	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.4.1.1 – Workshop report to be fed into D2.4 Final Report on Outreach Events	T2.4.1 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		
M09 - Oct 13	4C project - the4cproject@googlegroups.com	IO2.3.3.1 - Focus Group 1 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M09 - Oct 13	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.3.1 - Focus Group 1 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M09 - Oct 13	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.3.1 - Focus Group 1 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M10 - Nov 13	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	IO3.3.1.1 - T3.3-O1 Document/Annotated Response to	T3.3.1 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-		

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		MS12 - Draft Cost Models Study / Needs & Gap Analysis		3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.6 - Assumption 6: Early outputs from T3.4 CCEx Framework will identify possible co-dependencies with T3.3	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.5 - Assumption 5: Outputs from T4.2	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.5 - Assumption 5: Outputs from T4.2	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.5 - Assumption 5: Outputs from T4.2	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.4 - Assumption 4: Outputs from T4.2	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.4 - Assumption 4: Outputs from T4.2	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.3 - Assumption 3: Outputs from T4.1	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.3 - Assumption 3: Outputs from T4.1	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.2 - Assumption 2: Any existing meta-model candidates/methodologies used by existing Cost Models will be identified prior to T3.3 commencing.	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.1 - Assumption 1: Key stakeholders for T3.3	T2.1 - Miguel Ferreira - mferreira@keep.pt	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M10 - Nov 13	T3.3.0 - Hervé L'Hours - herve@essex.ac.uk	IO3.3.0.1 - Assumption 1: Key stakeholders for T3.3	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M11 - Dec 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS14 - Focus Group Meeting 2	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M11 - Dec 13	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS13 - Advisory Board 2	T1.2 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M11 - Dec 13	T4.4 - Diogo Proença - diogobcp@gmail.com	IO4.4.1.1 - O1 – A refinement of the prioritized assessment of the indirect economic determinants of digital curation	T4.4.1 - Diogo Proença - diogobcp@gmail.com	T4.4_Task Description for T4.4_T3.1		

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M11 - Dec 13	4C project - the4cproject@googlegroups.com	IO3.3.2.1 - T3.3-O2. Draft Task Methodology Circulated & Agreed	T3.3.2 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M11 - Dec 13	4C project - the4cproject@googlegroups.com	IO3.2.5.1 - Final Report for review by TG 3.2 and identified stakeholders in WP3 and 4C as well as comments welcomed from all members of 4C.	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS18 - Draft Specification for for Curation Costs Exchange	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	DoW		
M12 - Jan 14	T2.4.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	MS18 - Draft Specification for for Curation Costs Exchange	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	T2.4-information-dependencies_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS17 - Draft Submission Template for Curation Costs Exchange	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	DoW		
M12 - Jan 14	T2.4.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	MS17 - Draft Submission Template for Curation Costs Exchange	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	T2.4-information-dependencies_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS16 - Curation Costs Exchange Platform Pilot	T2.6 - William Killbride - william@dpconline.org	DoW		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS15 - Project Meeting 3	T1.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M12 - Jan 14	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO4.5.1.1 - I2 - DRAFT of Stakeholder Report	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M12 - Jan 14	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	IO4.4.3.1 - O3 – Document detailing the role of benefit, impact and value in curation activities.	T4.4 - Diogo Proença - diogobcp@gmail.com	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M12 - Jan 14	T4.3.3 - Raivo Ruusalepp - raivo@eba.ee	IO4.3.3.2 - Outputs to other tasks: T4.2	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T4_3 Task Description for IDP_ver_2.1_T3.1		
M12 - Jan 14	T4.3.3 - Raivo Ruusalepp - raivo@eba.ee	IO4.3.3.1 - Inputs from other tasks: T4.1	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4_3 Task Description for IDP_ver_2.1_T3.1		
M12 - Jan 14	T2.6.7 - William Kilbride - william@dpconline.org	IO2.6.7.2 - I25 – web and usage stats	T2.6.7 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M12 - Jan 14	T2.6.7 - William Kilbride - william@dpconline.org	IO2.6.7.1 - I24 – Project partner summaries of activity	4C project - the4cproject@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.6.2.5 - O6 - contribution to Report on Communications Activities D2.6	T2.6.4 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.6.2.5 - O4 - contribution to Report on Communications Activities D2.6	T2.6.2 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.6.2.5 - O4 - contribution to Report on Communications Activities D2.6	T2.6.2 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.6.2.5 - O14 - contribution to Report on Communications Activities D2.6	T2.6.6 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.5.4.6 - d2.5.14 Annual report (year one)	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.5.4.5 - d2.5.13 quarterly report 4	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		

In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
M12 - Jan 14	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.15 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M12 - Jan 14	T2.4.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.4.3.1 - I2.4.3.3 – Draft D2.8 CCEX (due in M24)	T2.6 - William Killbride - william@dpconline.org	T2.4-information-dependencies_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	IO2.3.3.2 - Focus Group 2 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M12 - Jan 14	T2.2.4 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.3.2 - Focus Group 2 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M12 - Jan 14	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.3.2 - Focus Group 2 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D4.3 - Report on Trustworthiness and Quality	T4.3 - Raivo Ruusalepp - raivo@eba.ee	DoW		
M12 - Jan 14	T2.4.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	D4.3 - Report on Trustworthiness and Quality	T4.3 - Raivo Ruusalepp - raivo@eba.ee	T2.4-information-dependencies_T3.1		
M12 - Jan 14	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	D4.3 - Report on Trustworthiness and Quality	T4.3 - Raivo Ruusalepp - raivo@eba.ee	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M12 - Jan 14	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	D4.1 - Prioritised Assessment of Indirect Economic Determinants	T4.1 - Raivo Ruusalepp - raivo@eba.ee	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M12 - Jan 14	4C project - the4cproject@googlegroups.com	D3.1 - Evaluation of Cost Models & Needs & Gap Analysis	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D3.1 - Evaluation of Cost Models & Needs & Gap Analysis	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	T3.2_TaskDescriptionT3_2Revised270313_T3.1		
M12 - Jan 14	T2.4.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	D3.1 - Evaluation of Cost Models & Needs & Gap Analysis	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	T2.4-information-dependencies_T3.1		
M12 - Jan 14	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	D3.1 - Evaluation of Cost Models & Needs & Gap Analysis	T3.2.5 - Ulla Bøgvad Kejser - ubk@kb.dk	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.6 - Report on Communications Activities	T2.5 - William Killbride - william@dpconline.org	DoW		
M12 - Jan 14	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	D2.1 - Baseline Study of Stakeholders & Stakeholder Initiatives	T2.1 - Miguel Ferreira - mferreira@keep.pt	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M12 - Jan 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D1.1 - Draft Sustainability & Benefits Realisation Plan	T1.6 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M13 - Feb 14	T4.4 - Diogo Proença - diogobcp@gmail.com	IO4.4.2.1 - O2 – Document detailing the role of risk in curation activities.	T4.4.2 - Diogo Proença - diogobcp@gmail.com	T4.4_Task Description for T4.4_T3.1		
M13 - Feb 14	4C project - the4cproject@googlegroups.com	IO3.3.3.1 - Skeleton Deliverable Structure	T3.3.3 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M14 - March 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS19 - Focus Group Meeting 3	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M14 - March 14	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO3.3.4.1 - T3.3-O3. Interim Output for Engagement. To be defined	T3.3.4 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		

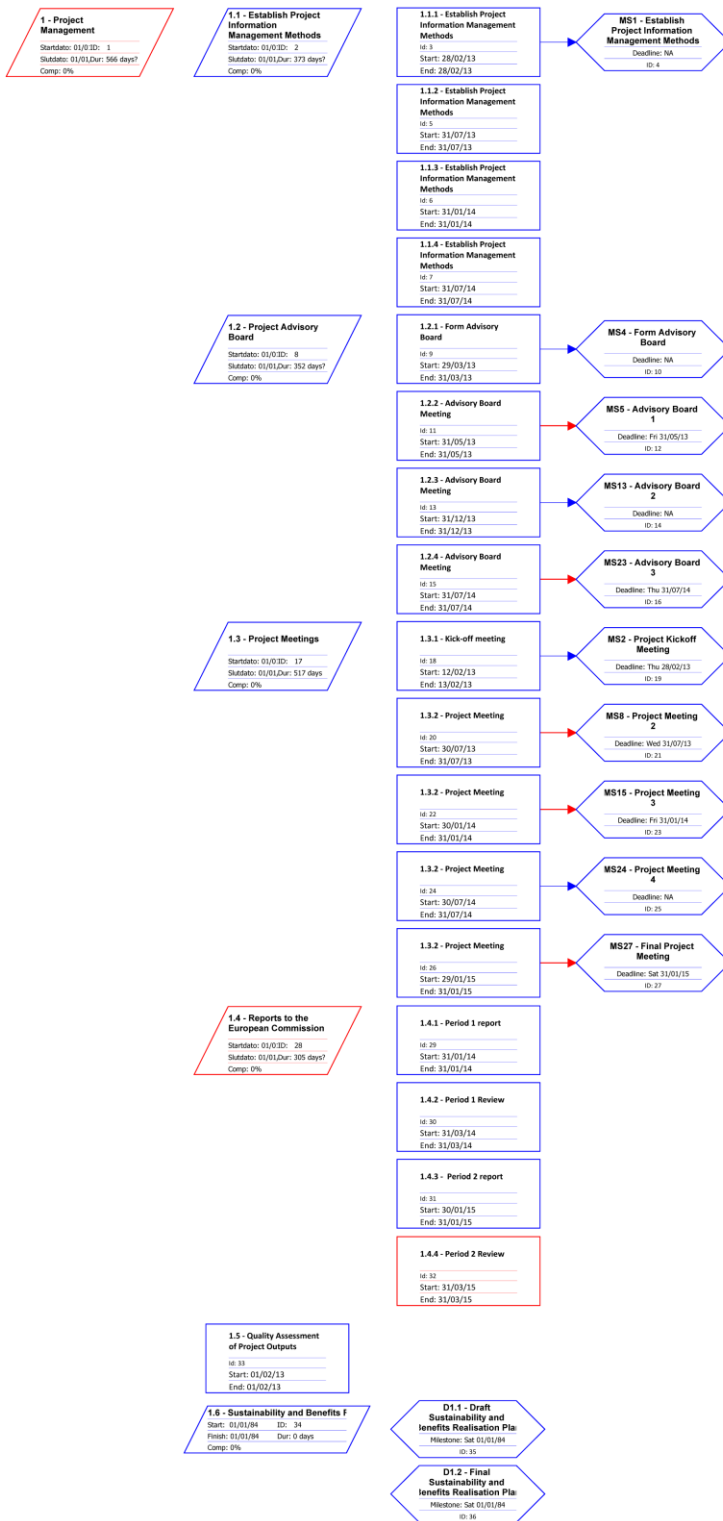
In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
M15 - April 14	T4.4 - Diogo Proença - diogobcp@gmail.com	IO4.4.3.1 - O3 – Document detailing the role of benefit, impact and value in curation activities.	T4.4.3 - Diogo Proença - diogobcp@gmail.com	T4.4_Task Description for T4.4_T3.1		
M15 - April 14	4C project - the4cproject@googlegroups.com	IO2.5.4.7 - d2.5.15 quarterly report 5	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M15 - April 14	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.16 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M15 - April 14	4C project - the4cproject@googlegroups.com	IO2.3.3.3 - Focus Group 3 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M15 - April 14	4C project - the4cproject@googlegroups.com	IO2.3.3.3 - Focus Group 3 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M15 - April 14	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.3.3 - Focus Group 3 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M16 - May 14	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO3.3.5.1 - T3.3-O4. Interim Output for Engagement. To be defined	T3.3.5 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M16 - May 14	T2.4.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	D5.1 - Draft Roadmap	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T2.4-information-dependencies_T3.1		
M16 - May 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D5.1 - Draft Roadmap	T5.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M17 - June 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS22 - Public Consultation on Roadmap	T5.1 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M17 - June 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS21 - Outreach Workshop 2	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		
M17 - June 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS20 - Focus Group Meeting 4	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M17 - June 14	T4.4 - Diogo Proença - diogobcp@gmail.com	IO4.4.4.1 - O4 – Document detailing the comparison of risk factors.	T4.4.4 - Diogo Proença - diogobcp@gmail.com	T4.4_Task Description for T4.4_T3.1		
M17 - June 14	4C project - the4cproject@googlegroups.com	IO3.3.6.1 - T3.3-d2. Complete Draft Deliverable	T3.3.6 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M18 - July 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS24 - Project Meeting 4	T1.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M18 - July 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS23 - Advisory Board 3	T1.2 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M18 - July 14	4C project - the4cproject@googlegroups.com	IO2.5.4.8 - d2.5.16 quarterly report 6	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M18 - July 14	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.17 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M18 - July 14	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.4.3.2 - Conference report to be fed into D2.4 Final Report on Outreach Events	T2.4.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		
M18 - July 14	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	IO2.4.2.1 – Workshop report to be fed into D2.4 Final Report on Outreach	T2.4.2 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		

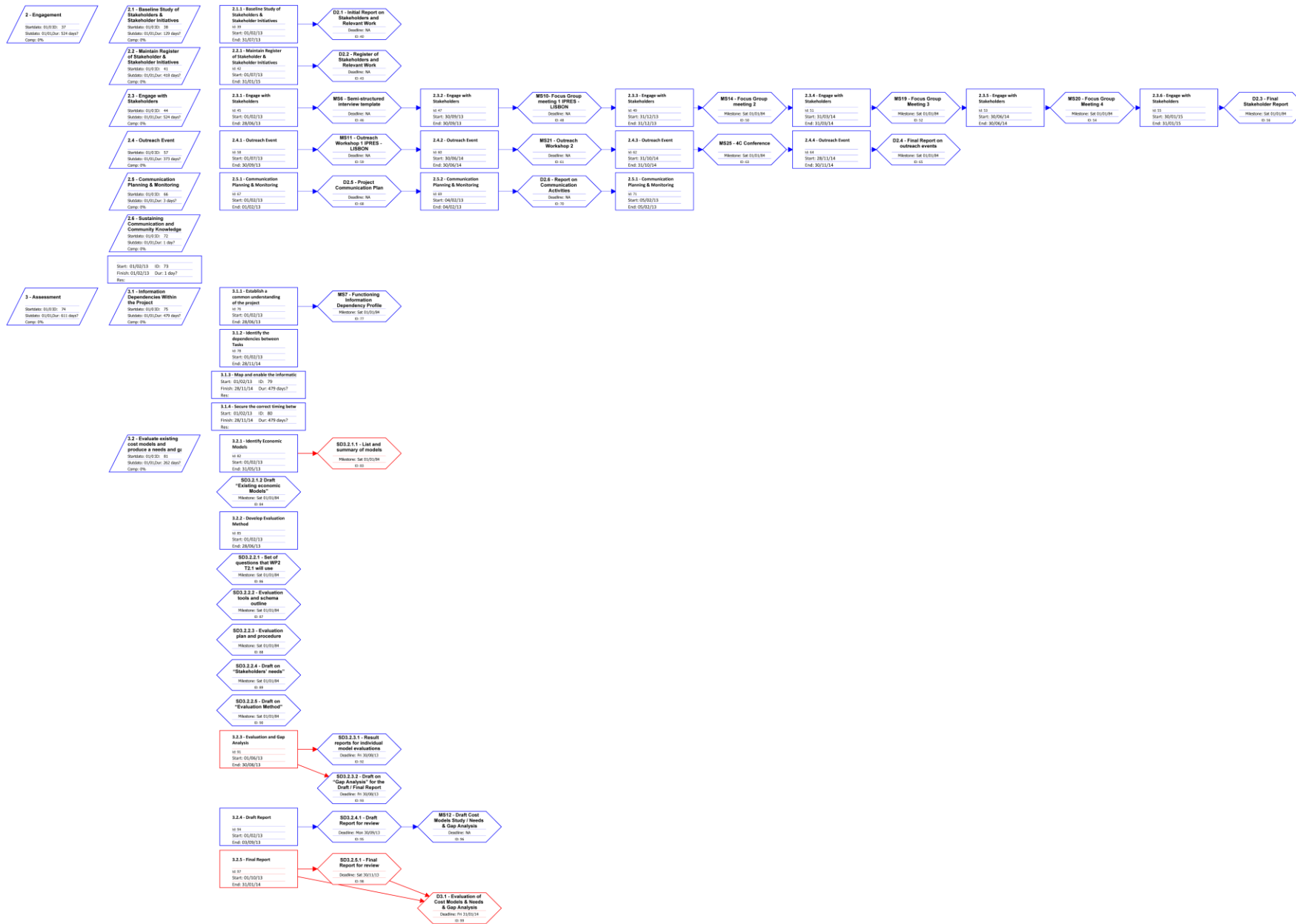
In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
		Events				
M18 – July 14	4C project - the4cproject@googlegroups.com	IO2.3.3.4 - Focus Group 4 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M18 – July 14	4C project - the4cproject@googlegroups.com	IO2.3.3.4 - Focus Group 4 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M18 – July 14	T2.2.5 - Joy Davidson - Joy.Davidson@glasgow.ac.uk	IO2.3.3.4 - Focus Group 4 report	T2.3.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.2.-information-dependencies_T3.1		
M18 – July 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D4.4 - Report on Risk, Benefit, Impact and Value	T4.4 - Diogo Proença - diogobcp@gmail.com	T4.4_Task Description for T4.4_T3.1		
M18 – July 14	T2.4.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	D4.4 - Report on Risk, Benefit, Impact and Value	T4.4 - Diogo Proença - diogobcp@gmail.com	T2.4-information-dependencies_T3.1		
M18 – July 14	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	D4.4 - Report on Risk, Benefit, Impact and Value	T4.4 - Diogo Proença - diogobcp@gmail.com	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M18 – July 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D3.2 - A Cost Concept Model & Gateway Requirement Specification	T3.3 - Hervé L'Hours - herve@essex.ac.uk	T3.3_4C-T3-1_InformationDependencyProfile-T3-3_v00-03_T3.1		
M21 – Oct 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS26 - Roadmap Workshop	T5.2 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M21 – Oct 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS25 - 4C Conference	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		
M21 – Oct 14	T5.2 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.5.1.2 - O1 - DRAFT of D4.5 for T5.3 and D5.2	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M21 – Oct 14	T5.3 - Neil Grindley - n.grindley@jisc.ac.uk	IO4.5.1.2 - O1 - DRAFT of D4.5 for T5.3 and D5.2	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M21 – Oct 14	4C project - the4cproject@googlegroups.com	IO2.5.4.9 - d2.5.17 quarterly report 7	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M21 – Oct 14	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.18 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M21 – Oct 14	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D3.3 - Curation Costs Exchange Framework	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	DoW		
M21 – Oct 14	T2.4.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	D3.3 - Curation Costs Exchange Framework	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	T2.4-information-dependencies_T3.1		
M24 - Jan 15	4C project - the4cproject@googlegroups.com	IO2.6.6.8 - O16 - Implemented CCEX platform.	T2.6.6 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	T2.6.6 - William Kilbride - william@dpconline.org	IO2.6.6.1 - I16 – Wider Consultation with WP3	WP3 - the4cprojectWP3@googlegroups.com	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	T2.5.4 - William Kilbride - william@dpconline.org	IO2.5.4.19 - I10 Partner quarterly reports	4C project - the4cproject@googlegroups.com	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M24 - Jan 15	4C project - the4cproject@googlegroups.com	IO2.5.4.11 - d2.5.19 End of project report	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M24 - Jan 15	4C project - the4cproject@googlegroups.com	IO2.5.4.10 - d2.5.18 quarterly report 8	T2.5.3 - William Kilbride - william@dpconline.org	T2.5_Task Description 2.5 for IDP ver02_T3.1		
M24 -	4C project -	IO2.2.5.1 - O2.2.5.1 – Plan to sustain the	T2.2.5 - Joy Davidson -	T2.2.-information-dependencies_T3.1		

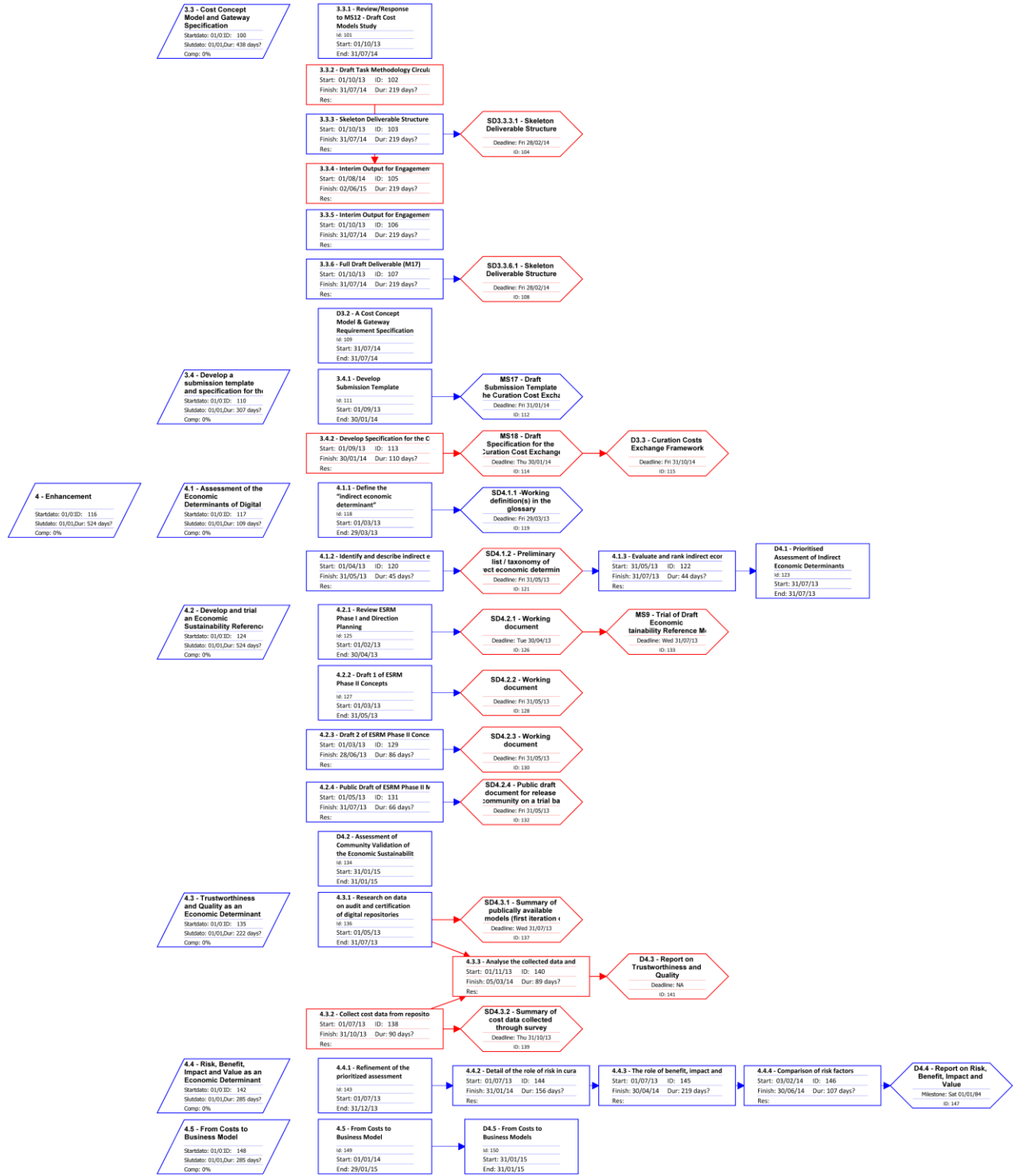
In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
Jan 15	the4cproject@googlegroups.com	stakeholders registry developed in consultation with our user communities and EC	Joy.Davidson@glasgow.ac.uk			
M24 - Jan 15	T2.6.6 - William Kilbride - william@dpconline.org	D3.3 - I19 – Curation Costs Exchange Framework	T3.4 - Heiko Tjalsma - heiko.tjalsma@dans.knaw.nl	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	T2.6.6 - William Kilbride - william@dpconline.org	D3.2 - I18 – A Cost Concept Model & Gateway Requirement Specification	T3.3 - Hervé L'Hours - herve@essex.ac.uk	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	T2.6.6 - William Kilbride - william@dpconline.org	D3.1 - I17 – Evaluation of Cost Models & Needs & Gap Analysis	T3.2 - Ulla Bøgvad Kejser - ubk@kb.dk	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	4C project - the4cproject@googlegroups.com	D2.8 - Curation Costs Exchange	T2.6.6 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.8 - Curation Costs Exchange	T2.6.6 - William Kilbride - william@dpconline.org	T2.6_130503 Task Description 2.6 for IDP ver02_T3.1		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.3 - Final Stakeholder Report	T2.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.3-information-dependencies_T3.1		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	MS27 - Final Project Meeting	T1.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D5.2 - Final Roadmap Report	T5.3 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D4.5 - From Costs to Business Models	T4.5 - Tomasz Miksa - tmiksa@securityresearch.at	T4.5_Task descriptions for T4.5_From costs to business models_T3.1		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D4.2 - Assessment of Community Validation of the Economic Sustainability Reference Model	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T2.4-information-dependencies_T3.1		
M24 - Jan 15	T2.4.3 - Sabine Schrimpf - S.Schrimpf@dnb.de	D4.2 - Assessment of Community Validation of the Economic Sustainability Reference Model	T4.2 - Neil Grindley - n.grindley@jisc.ac.uk	T2.4-information-dependencies_T3.1		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.8 - Curation Costs Exchange	T2.5 - William Killbride - william@dpconline.org	DoW		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.4 - Final Report on Outreach Events	T2.4 - Sabine Schrimpf - S.Schrimpf@dnb.de	T2.4-information-dependencies_T3.1		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D2.2 - Maintain Register of Stakeholder & Stakeholder Initiatives	T2.2 - Kevin Ashley - kevin.ashley@ed.ac.uk	DoW		
M24 - Jan 15	T1.5 - Paul Stokes - p.stokes@jisc.ac.uk	D1.2 - Final Sustainability & Benefits Realisation Plan	T1.6 - Neil Grindley - n.grindley@jisc.ac.uk	DoW		
	Information Objects that have been delivered					
	Formal deliverables and milestones					
	Remember that all formal milestones and deliverables are to be sent to T1.5 -					

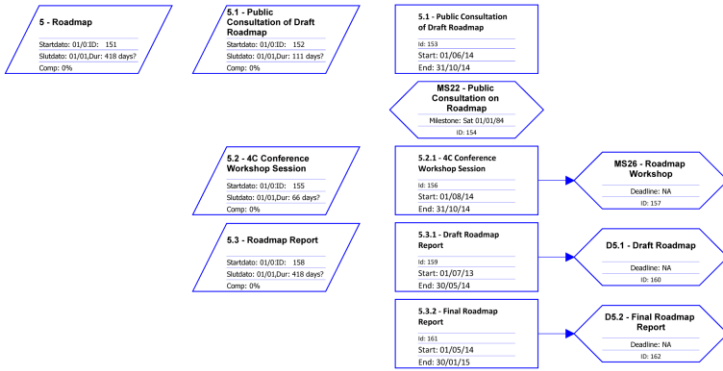
In (Delivery Date)	I (Consumer)	Need this (Information Object)	From you (Creator)	Source (Task description - word file)	T3.1 comment	Status
	Paul Stokes - p.stokes@jisc.ac.uk for QA					

Annex 2: Snapshot of the PERT chart









Annex 3: Example of Template developed by T3.1

The template developed by T3.1 for Task leaders to describe their Task:

http://4cproject.net/?attachment_id=317

Template for Task-descriptions

1.1 Task description

→Here you are supposed to make your own description of your Task in collaboration with you Task-members. It is important to have a copy of the Description of Work (DoW) at hand so your description doesn't deviate too much from the DoW. Of course, it is also important that the Task leaders and the Work Package leaders agree upon the description. Don't follow the structure indicated below if it does not help←

Task << Task name and number >>

Description:

Method:

Milestones:

Deliverables:

Sub-task 1 <<Task name>>

Description:

Method:

Mini-Deliverables:

Inputs:

Outputs:

Sub-task 2 <<Task name>>

Description:

Method:

Mini-Deliverables:

Inputs:

Outputs:

2.1 Task dependencies and timing – inputs and outputs

→Here you can paste a copy of the Task-specific Gantt-chart and/or make a list of deliverables, inputs and outputs so that it is easy to get an overview of the dependencies and timings of the Task←

		2013	feb	mar	apr	maj	jun	jul
No	Task	Resources	M1	M2	M3	M4	M5	M6

- O1 - << Output name >> - << Month number >> - << Month of year >>
- I1 - << Input name >> - << Month number >> - << Month of year >>
- d2 - << Mini-deliverable name >> - << Month number >> - << Month of year >>
- MS7 - << Milestone name >> - << Month number >> - << Month of year >>
- D3 << Deliverable name >> - << Month number >> - << Month of year >>

3.1 Task risks

→Here you make a list of risks inherent to your Task←

- R1 - << Short risk description with causes, impacts, consequences and preventive actions >>
- R2 -

Annex 4: Snapshot of the 4C Project Glossary

The 4C Project Glossary¹⁷ is dynamic and will be refined and expanded as the project proceeds and as the need for agreement on new terms emerges. The following is a snapshot of the Glossary as of mid-June 2013 (M5):

Term	Definition	Author	Comments
Accountability	Principle of Accountability: A senior executive (or a person of comparable authority) shall oversee the information governance program and delegate responsibility for records and information management to appropriate individuals. The organization adopts policies and procedures to guide personnel and ensure that the program can be audited.	Ulla Bøgvad Kejser	ARMA, http://www.arma.org
Accounting model	Set of basic assumptions, concepts, principles and procedures that determine the methods of recognizing, recording, measuring and reporting an entity's financial transactions.	Ulla Bøgvad Kejser	BusinessDictionary.com
Activity	Measureable amount of work performed by systems and/or people to produce a result	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Activity checklist	A checklist of digital curation activities that incur costs. Activities may be ordered in categories and different levels of sub categories.	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Asset	Something of value owned by the enterprise. An asset is an actual thing (tangible or intangible) owned by the enterprise, rather than the accounting sense of "asset" - the monetary value of the thing. Categories of asset are: fixed asset, resource.	Diogo Proença	OMG Business Motivation Model
Authenticity		Ulla Bøgvad Kejser	
Availability	Principle of Availability: An organization shall maintain records and information in a manner that ensures timely, efficient, and accurate retrieval of needed information.	Ulla Bøgvad Kejser	ARMA, http://www.arma.org
Benefit	Finance: Desirable and measurable outcome or result from an action, investment, project, resource, or technology	Ulla Bøgvad Kejser	BusinessDictionary.com
Benefit (long-term)	Benefits expected to be received beyond five years from the present	Neil Grindley	Keeping Research Data Safe, Beagrie et al
Benefit (near-term)	Benefits expected to be received up to five years from the present	Neil Grindley	Keeping Research Data Safe, Beagrie et al

¹⁷http://4cproject.net/?attachment_id=317

Term	Definition	Author	Comments
Benefit model		Ulla Bøgvad Kejser	
Big data science	Institutions for scientific research that deal with large amounts of data, e.g. space and high-energy physics research A set of activities that are performed within an organization or across organizations A Business Process may contain more than one separate Process. Each Process may have its own Sub-Processes. Individual Processes would be independent in terms of sequence flow, but could have message flows connecting them.	Katarina Haage	see p. 6 in Stakeholder registry
Business Process	An activity is work that is performed within a business process. An activity can be atomic or non-atomic (compound). The types of activity that are a part of a Business Process are: Process, Sub-Process, and Task.	Diogo Proença	OMG Business Motivation Model
Channel	Means of communication with internal and external audiences, e.g. social media, direct email, face to face.	Sarah Norris	Sarah Norris
Compliance	Principle of Compliance: An information governance program shall be constructed to comply with applicable laws and other binding authorities, as well as with the organization's policies.	Ulla Bøgvad Kejser	ARMA, http://www.arma.org
Confidentiality		Ulla Bøgvad Kejser	
Consultation	A tool in form of a questionnaire consisting of 13 basic questions and optional 33 additional questions to analyse the potential stakeholder group in-depth; via mailing and web; running time: 5 weeks (May 17th - June 21st 2013) An amount that has to be paid or given up in order to get something. In business, cost is usually a monetary valuation of (1) effort, (2) material, (3) resources, (4) time and utilities consumed, (5) risks incurred, and (6) opportunity forgone in production and delivery of a good or service. All expenses are costs, but not all costs (such as those incurred in acquisition of an income-generating asset) are expenses	Katarina Haage	see http://4cproject.net/initial_consultation/
Cost	Factual information concerning the cost of labor, material, overhead and other cost elements.	Ulla Bøgvad Kejser	BusinessDictionary.com
Cost data	A representation that describe how resources (i.e. labour and capital) required to accomplish digital curation activities relate to costs. May include a set of mathematical equations that converts resource data into cost data.	Ulla Bøgvad Kejser	Justia.com
Cost model	A representation of the costs of digital curation	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Cost model	Set of mathematical equations that converts resource data into cost data.	Ulla Bøgvad Kejser	Alex Thirifays
Cost model		Ulla Bøgvad Kejser	BusinessDictionary.com

Term	Definition	Author	Comments
Cost model	A representation of the activity of digital preservation that can be shared, examined and critiqued and whose purpose is to shed light on the costs entailed in the activity of digital preservation.	Ulla Bøgvad Kejser	APARSEN-REP_D32_1-01-1_0, p. 11
Cost model expert	Institutions that have developed and/or implemented a digital preservation cost model	Katarina Haage	see p.6 in Stakeholder registry
Cost tool	Implementation of a cost model in an electronic spreadsheet or costing program	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser The CCEx is a new concept and the finer details are yet to be decided based on the outcomes of consultations with stakeholders and an analysis of partner organisation cost data. The absence of a 'complete definition' provides us with a great opportunity to develop an information 'framework' which is really useful to its ultimate users, provided we listen first and that all 4C partner organisations help us with this. The definition to be developed further throughout the project.
Curation Costs Exchange (CCEx)	The CCEx is intended to be an online, virtual community platform for the exchange of curation cost information. The CCEx will be used to gather cost information from partner organisations and stakeholders, submitted to the exchange using a Submission Form/Template. The form will aim to capture calculation processes, metrics, effort statistics, value calculations, from stakeholders in order to underpin future activity with empirical knowledge. Economics: (1) Desire for certain good or service supported by the capacity to purchase it. (2) The aggregate quantity of a product or service estimated to be bought at a particular price. (3) The total amount of funds which individuals or organizations want to commit for spending on goods or services over a specific period.	Sarah Norris	
Demand	The amount of a particular economic good or service that a consumer or group of consumers will want to purchase at a given price. The demand curve is usually downward sloping, since consumers will want to buy more as price decreases. Demand for a good or service is determined by many different factors other than price, such as the price of substitute goods and complementary goods. In extreme cases, demand may be completely unrelated to price, or nearly infinite at a given price. Along with supply, demand is one of the two key determinants of the market price.	Ulla Bøgvad Kejser	BusinessDictionary.com
Demand	Digital curation involves maintaining, preserving and adding value to digital research data throughout its lifecycle.	Ulla Bøgvad Kejser	InvestorWords.com
Digital curation		Ulla Bøgvad Kejser	http://www.dcc.ac.uk/digital-curation/what-digital-curation

Term	Definition	Author	Comments
Digital curation	Digital curation involves selection and appraisal by creators and archivists; evolving provision of intellectual access; redundant storage; data transformations; and, for some materials, a commitment to long-term preservation.	Ulla Bøgvad Kejser	Lee & Tibbo, 2007, "Digital Curation and Trusted Repositories: Steps Toward Success" http://journals.tdl.org/jodi/index.php/jodi/article/view/229/183
Digital curation	Digital curation is the selection, preservation, maintenance, collection and archiving of digital assets.	Ulla Bøgvad Kejser	https://en.wikipedia.org/wiki/Digital_curation
Digital curation	Digital curation involves pre-ingest (appraisal, selection, preparation), ingest, data management, archival storage, preservation planning, access, repository administration and general management	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Digital preservation solution/storage vendors	Companies with products in the area of digital preservation, e.g. storage vendors, software providers	Katarina Haage	see p. 6 in Stakeholder registry
Disposition	Principle of Disposition: An organization shall provide secure and appropriate disposition for records and information that are no longer required to be maintained by applicable laws and the organization's policies.	Ulla Bøgvad Kejser	ARMA, http://www.arma.org
Dissemination	As opposed to communication, dissemination describes the one way process of issuing information, without seeking or receiving communication in return.	Sarah Norris	Sarah Norris
Economic model	A collection of assumptions, often expressed as equations relating variables, from which inferences can be derived about economic behavior and performance.	Ulla Bøgvad Kejser	InvestorGuide.com
Economic model	Economic model: A representation that describes how economic processes around digital curation work; including the flow of resources (costs and revenues) within the economic lifecycle of digital information assets, and stakeholders (from the demand, supply and management side) interaction with this lifecycle.	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Economic model	Stylized representations of how economic processes work. They are a means to abstract an economic process down to the essential details that are important for 1) understanding how the process works, and 2) identifying the aspects of the process that can be influenced by outside intervention, such as public policy.	Ulla Bøgvad Kejser	Blue Ribbon Task Force Interim Report, Sustaining the Digital Investment: Issues and Challenges of Economically Sustainable Digital Preservation, 2008, p. 29

Term	Definition	Author	Comments
Economies of scale	Refers to a situation in which the average cost of producing a good (or service) declines as the scale of production increases. This could happen, for instance, if a firm can buy in bulk, taking advantage of lower unit costs on its inputs, or by allowing more specialization of its workforce, allowing each worker to become more efficient. Economies of scale occur because the organization can spread its fixed costs over a larger and larger level of output as it expands in scale. If a particular industry experiences economies of scale, this suggests that one very large firm can produce the product at a lower average cost than a number of smaller firms could.	Ulla Bøgvad Kejser	Blue Ribbon Task Force Interim Report, Sustaining the Digital Investment: Issues and Challenges of Economically Sustainable Digital Preservation, 2008, p. 23
Economies of scale	The reduction in long-run average and marginal costs arising from an increase in size of an operating unit (a factory or plant, for example). Economics of scale can be internal to an organization (cost reduction due to technological and management factors) or external (cost reduction due to the effect of technology in an industry).	Ulla Bøgvad Kejser	BusinessDictionary.com
Economies of Scope	Refers to a situation in which the average cost of production is lower when an organization produces a wider range of products, rather than just one. This occurs because inputs can be spread over several different products rather than allocated to just one product. For example, building a range of different collections may lead to reduced costs per document, because activities such as metadata creation, web development, and storage can be shared across the collections.	Ulla Bøgvad Kejser	Blue Ribbon Task Force Interim Report, Sustaining the Digital Investment: Issues and Challenges of Economically Sustainable Digital Preservation, 2008, p. 23
Economies of Scope	Reduction in long-run average and marginal costs, due to the production of similar or related goods or services where the output or provision of an item 'A' reduces the cost of item 'B.'	Ulla Bøgvad Kejser	BusinessDictionary.com
Effectiveness	The degree to which objectives are achieved and the extent to which targeted problems are solved. In contrast to efficiency, effectiveness is determined without reference to costs and, whereas efficiency means "doing the thing right," effectiveness means "doing the right thing."	Ulla Bøgvad Kejser	BusinessDictionary.com
Efficiency	The comparison of what is actually produced or performed with what can be achieved with the same consumption of resources (money, time, labor, etc.). It is an important factor in determination of productivity.	Ulla Bøgvad Kejser	BusinessDictionary.com

Term	Definition	Author	Comments
Efficiency	Refers to a situation in which one is producing a good or service at the lowest cost possible, everything else being equal. The "everything else being equal" clause is quite important. If, for instance, the price of one of the resources used to produce the good goes down, the resulting cost decrease does not indicate an increase in efficiency. Likewise, if one is able to reduce the cost of production by reducing the quality of the good, this is not an increase in efficiency. If, however, one can find a new technique that allows one to produce the same, identical good at a lower cost, (with no changes in the price of inputs in the market having taken place) an increase in efficiency will have occurred. Efficiency is not the same as cheap. In many cases, the most efficient way to produce is still very expensive.	Ulla Bøgvad Kejser	Blue Ribbon Task Force Interim Report, Sustaining the Digital Investment: Issues and Challenges of Economically Sustainable Digital Preservation, 2008, p. 23
Extensible interview framework template	A framework for in-depth interviews and mini-consultations with stakeholder groups ; starting with questions based on the ones from the initial consultation; to be enriched during the project lifetime correspondent to the process of the needs and requirements of the workpackages as well as the stakeholder groups	Katarina Haage	Katarina Haage
Financial information Flexibility	All types of information necessary for financial management (accounting, budgeting, and charging). It includes factual data on the cost (e.g. labour, materials and overhead), additional information describing what is being costed (e.g. assumptions and specifications), as well as information that relates to the benefits and value that the digital curation activities accrue and how these incentives influence economic behaviour and performance.	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Focus group	Specially organized meeting for every stakeholder group to understand their needs and requirements as well as to gain a better understanding of their views on nature of cost, benefit value, sustainability etc.; ideally attached to a key event	Katarina Haage	see p. 8 in DoW
Governance	The discipline of monitoring, managing, and steering a business (or IS/IT landscape) to deliver the business outcome required.	Diogo Proença	TOGAF
Industry Information asset	Companies that deal with a great amount of data, e.g. automotive, aviation, banks & finance, bioinformatics, cartography, defense industry, pharmaceutical, space Any information that represent value to an individual or organisation	Katarina Haage Ulla Bøgvad Kejser	see p.6 in Stakeholder registry Ulla Bøgvad Kejser

Term	Definition	Author	Comments
Integrity	Principle of Integrity: An information governance program shall be constructed so the information generated by or managed for the organization has a reasonable and suitable guarantee of authenticity and reliability.	Ulla Bøgvad Kejser	ARMA, http://www.arma.org Addressing Digital Preservation: Proposals for New Perspectives, 2009, pg 1 http://cs.harding.edu/indp/papers/barateiro7.pdf
Interoperability	IEEE defines interoperability as the ability of two or more systems or components to exchange and use information. 1. The ability to share information and services. 2. The ability of two or more systems or components to exchange and use information. 3. The ability of systems to provide and receive services from other systems and to use the services so interchanged to enable them to operate effectively together.	Jaan Krupp	
Interoperability	The main object/purpose of 4C communications to targeted stakeholder groups.	Diogo Proença	TOGAF
Key Message	The common sense principle that defines the generally observed relationship between demand, supply, and prices: as demand increases the price goes up, which attracts new suppliers who increase the supply bringing the price back to normal. However, in the marketing of high price (prestige) goods, such as perfumes, jewelry, watches, cars, liquor, a low price may be associated with low quality, and may reduce demand.	Sarah Norris	Sarah Norris
Law of supply and demand	Graphical, mathematical (symbolic), physical, or verbal representation or simplified version of a concept, phenomenon, relationship, structure, system, or an aspect of the real world. The objectives of a model include (1) to facilitate understanding by eliminating unnecessary components, (2) to aid in decision making by simulating 'what if' scenarios, (3) to explain, control, and predict events on the basis of past observations. Since most objects and phenomenon are very complicated (have numerous parts) and much too complex (parts have dense interconnections) to be comprehended in their entirety, a model contains only those features that are of primary importance to the model maker's purpose.	Ulla Bøgvad Kejser	BusinessDictionary.com
Model	A representation of a subject of interest. A model provides a smaller scale, simplified, and/or abstract representation of the subject matter. A model is constructed as a "means to an end". In the context of enterprise architecture, the subject matter is a whole or part of the enterprise and the end is the ability to construct "views" that address the concerns of particular stakeholders; i.e., their "viewpoints" in relation to the subject matter.	Ulla Bøgvad Kejser	BusinessDictionary.com
Model		Diogo Proença	TOGAF

Term	Definition	Author	Comments
Non cost data	That does not contain any cost information but which includes significant facts necessary in describing what is being costed. For example, assumptions, schedules, specifications, technical descriptions, etc.	Ulla Bøgvad Kejser	BusinessDictionary.com
Numerical values	Values are numerical, boolean, ordered lists that are assigned to a parameter or the result of a function	Ulla Bøgvad Kejser	Anders Bo Nielsen
Organization	A self-contained unit of resources with line management responsibility, goals, objectives, and measures. Organizations may include external parties and business partner organizations.	Diogo Proença	TOGAF
Parameter	Definable, measurable, and constant or variable characteristic, dimension, property, or value, selected from a set of data (or population) because it is considered essential to understanding a situation (or in solving a problem). The term is used to identify a characteristic, a feature, a measurable factor that can help in defining a particular system.	Ulla Bøgvad Kejser	BusinessDictionary.com
Parameter	Ulla: examples of parameters in cost modelling: investment cost; operational cost; number of files; data volume; number of redundant copies	Ulla Bøgvad Kejser	http://en.wikipedia.org/wiki/Parameter
Parameter	Values, often but not necessarily numerical, that enable quantification to be introduced into the outputs based on values of the inputs	Ulla Bøgvad Kejser	APARSEN-REP_D32_1-01-1_0, p. 11
Performance Indicator	A unit of measurement designed to evaluate the success of its associated activity	Sarah Norris	Sarah Norris
Pre-ingest	Activities that precede ingest activities; including appraisal, selection (deselection) and preparation of assets for transfer (push/pull) into the repository/storage area (e.g. analysis of the nature of the assets and their management requirements, or cost benefit analysis).	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Proposition	Unique/bespoke combination of communication activities and messages directed at a particular stakeholder group.	Sarah Norris	Sarah Norris
Protection Quality	Principle of Protection: An information governance program shall be constructed to ensure a reasonable level of protection for records and information that are private, confidential, privileged, secret, classified, or essential to business continuity or that otherwise require protection.		ARMA, http://www.arma.org
Reference Model	An abstract framework for understanding significant relationships among the entities of some environment, and for the development of consistent standards or specifications supporting that environment	Neil Grindley	OASIS - Advancing Open Standards for the Information Society - https://www.oasis-open.org/committees/soa-rm/faq.php

Term	Definition	Author	Comments
Reference Model Reputation	A reference model is an abstract framework for understanding significant relationships among the entities of [an] environment, and for the development of consistent standards or specifications supporting that environment. A reference model is based on a small number of unifying concepts and may be used as a basis for education and explaining standards to a non- specialist. A reference model is not directly tied to any standards, technologies, or other concrete implementation details, but it does seek to provide common semantics that can be used unambiguously across and between different implementations.	Diogo Proença	TOGAF (build upon the OASIS definition)
Retention	Principle of Retention: An organization shall maintain its records and information for an appropriate time, taking into account its legal, regulatory, fiscal, operational, and historical requirements.	Ulla Bøgvad Kejser	ARMA, http://www.arma.org
Risk	Risk is the potential that a chosen action or activity (including the choice of inaction) will lead to a loss (an undesirable outcome). The notion implies that a choice having an influence on the outcome sometimes exists (or existed). Potential losses themselves may also be called "risks". Any human endeavor carries some risk, but some are much more risky than others.	Jaan Krupp	http://en.wikipedia.org/wiki/Risk
Risk	A potential impact that indicates the possibility of loss, injury, disadvantage, or destruction	Diogo Proença	OMG Business Motivation Model
Risk Sensitivity	The effect of uncertainty on objectives	Diogo Proença	ISO73:2009
Stakeholder	A person, group or organization that has interest or concern in an organization	Ulla Bøgvad Kejser	BusinessDictionary.com
Stakeholder	Individuals, groups and institutions active or interested in the issue of curation costs	Ulla Bøgvad Kejser	4C WP2
Stakeholder	On the one side the roles of managers and administrators of digital repositories and other suppliers of preservation services; and on the other the roles of owners, producers and consumers of digital assets that have a demand for these services and a willingness to pay for the value that these services represent to them.	Ulla Bøgvad Kejser	Ulla Bøgvad Kejser
Stakeholder	An individual, team, or organization (or classes thereof) with interests in, or concerns relative to, the outcome of the architecture. Different stakeholders with different roles will have different concerns.	Diogo Proença	TOGAF (http://www.opengroup.org/togaf/)

Term	Definition	Author	Comments
Supply	The total amount of a product (good or service) available for purchase at any specified price. Supply is determined by: (1) Price: producers will try to obtain the highest possible price whereas the buyers will try to pay the lowest possible price both settling at the equilibrium price where supply equals demand. (2) Cost of inputs: the lower the input price the higher the profit at a price level and more product will be offered at that price. (3) Price of other goods: lower prices of competing goods will reduce the price and the supplier may switch to switch to more profitable products thus reducing the supply.	Ulla Bøgvad Kejser	BusinessDictionary.com
Supply	The total amount of a good or service available for purchase; along with demand, one of the two key determinants of price.	Ulla Bøgvad Kejser	InvestorWords.com
Sustainability	The capacity to endure.	Neil Grindley	http://en.wikipedia.org/wiki/Sustainability Guthrie, K., Griffiths, R., Maron, N. Sustainability and revenue models for online academic resources: an Ithaka repor(pdf), JISC 2008 - http://sca.jiscinvolve.org/wp/files/2008/06/sca_ithaka_sustainability_report-final.pdf http://www.sl.nsw.gov.au/services/public_libraries/publications/digital_practice_guidelines/Digital_preservation.html
Sustainability (Digital)	Having a mechanism in place for generating, or gaining access to, the economic resources necessary to keep the intellectual property or the service available on an ongoing basis	Neil Grindley	
Sustainability (Digital)	Digital sustainability focuses on building a flexible approach to data preservation with an emphasis on interoperability, standards, continued maintenance and continous development.	Katarina Haage	
The term	The definition (in the context of 4C) Principle of Transparency: An organization’s business processes and activities, including its information governance program, shall be documented in an open and verifiable manner, and that documentation shall be available to all personnel and appropriate interested parties.	Who added	Comments especially as regards source (e.g. APARSEN, InterPARES, etc.)
Transparency		Ulla Bøgvad Kejser	ARMA, http://www.arma.org
Trustworthiness	Quality of being authentic and reliable.	Jaan Krupp	http://www.businessdictionary.com
User/user community	See 'Stakeholder'	Sarah Norris	Sarah Norris
Value	Value is something that an information object can intrinsically have, but which may not have any currency with a funding organisation; it is seen through the eye of the beholder. Discovery of what is or is not important to a proposed funding organisation can be made through their organisational objectives or strategic plan.	Jaan Krupp	https://dspace.gla.ac.uk/bitstream/1905/690/1/espida_world_all_strange.pdf

Term	Definition	Author	Comments
Value (enduring)	The continuing usefulness or significance of digital resources, based on the administrative, legal, fiscal, evidential, or historical information they contain and function they serve, justifying their on-going preservation. The phrase "enduring value" emphasises the perceived value of the digital resources when they are appraised, recognising that a future selector may reappraise the records and dispose of them.	Katarina Haage	https://www.google.com/url?q=http://www.library.yale.edu/iac/DPC/revpolicy2-19-07.pdf&sa=U&ei=Gn2kUZerB4rvOZXdgJgF&ved=0CBUQFjAGOBQ&client=internal-uds-cse&usg=AFQjCNFZvfyjALFx7jYf_Po4l6jl1iLHhg
Meta-model	"Metamodeling" is the construction of a collection of "concepts" (things, terms, etc.) within a certain domain. A model is an abstraction of phenomena in the real world; a metamodel is yet another abstraction, highlighting properties of the model itself.		Wikipedia (inevitably).
Concept model	a conceptual model represents 'concepts' (entities) and relationships between them within a problem domain.		

Annex 5: The full description of T3.1 from the DoW

T3.1 – Coordinate, design and monitor the information dependencies within the project (M1-M22)

Task Leader: DNA Participants: KBDK, UESSEX, KNAW-DANS

The Assessment group will be responsible for producing the applied deliverables that emerge from component tasks in other work packages, and as such it is critical that the flow of information between groups, e.g. from the focus groups to the needs and gap analysis report (D3.1); or from the interviews to the CCEx Submission template (MS17), occurs using mutually beneficial formats. This coordination exercise will require frequent liaison and an in-depth knowledge of the intellectual dependencies between the work packages, principally as they pertain to the effective production of WP3 deliverables. To maximise the impact of WP4 activities, WP3 will design and scope some of the more detailed aspects of the Enhancement work and act in the role of a 'client' drawing on the specific expertise of others. This information dependency profile will be a detailed elaboration of the Project Structure and PERT diagrams (see section B 1.3.1 figures 2 and 3) and at a much more applied level (e.g. data schema) than would be possible or advisable as part of WP1 (Project Management).¹⁸

¹⁸ Description of work, A, Work Package Descriptions, Work Package 3, p.11

Annex 6: Task leaders' Task descriptions as of June 20th 2013

The following pages provides the all the raw Task descriptions that were needed for the making of the Dependency Registry, T3.4 excluded, because this task starts late (M8), and all the Project Management (WP1) Tasks also excluded (except for T1.5—Quality Assessment), because they hold no dependencies with the other Tasks.

A.1 T1.5 Quality Assessment

Task description

The purpose of this task to ensure that the outputs of the projects are—to the extent that it is possible across such a diverse range of activities—of uniformly high quality, in terms of both their presentation and their content. They will be checked for coherence and consistency with other outputs and against the DoW. A written procedure and checklist for quality assessment will be produced and circulated to all partners so that everyone is clear what the procedure is.

T1.5 Quality Assess Project Outputs

Description: Assessment of outputs

Method: The project workplan and the detailed planning that is being done as part of the information dependency profile work will be examined and a schedule of all relevant public outputs will be listed with the timescale of when they are expected and in what format. Each of the outputs will be designated to two specific named assessors from the organisations named as task participants (JISC, DNB, DNA and NLE).

Milestones: no formal milestones have been included in the DoW

Deliverables: no formal deliverables are associated with this task

T1.5.1 Devise procedure

Description: Document QA procedure

Method: Formulate document and checklist and circulate to MCG for sign-off

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO1.5.1.1	d1.5.1 A document and checklist	?

Inputs:

Outputs:

O1 – Distribute to DNB, DNA, NLE for sign off

T1.5.2 List all outputs

Description: A comprehensive list of all the public outputs that are anticipated as being produced by the project, down to the level of individual documents that will accompany designated deliverables.

Method: This can be generated by looking through the DoW, by looking at the IDP and by checking with all partners to verify the likely output formats

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO1.5.2.1	d1.5.2 A shared table	M5 – June 2013

Inputs:

ID (T3.1)	Description	Deadline
IO1.5.2.2	I1—T3.1 (check all forms of public project output)	M5 – June 2013
IO1.5.2.3	I2—All task leaders (to check their outputs have been correctly listed)	M6 – July 2013

Outputs:

O2 – All task leaders

T1.5.3 Undertake QA throughout projectDescription: Assess outputsMethod: Use procedures for checking outputsMini-Deliverables: n/aInputs: all tasksOutputs: all tasks**Task dependencies and timing – inputs and outputs**

→Here you can paste a copy of the Task-specific Gantt-chart and/or make a list of deliverables, inputs and outputs so that it is easy to get an overview of the dependencies and timings of the Task←

		2013	Feb	Mar	Apr	May	Jun	Jul
No	Task	Resources	M1	M2	M3	M4	M5	M6
d1.5.1	Document QA procedure					x		
O1	Distribute to T1.5 participants					x		
1.5.2	List all public project outputs						x	
I1	From T3.1 to check outputs						x	
I2	From all task leaders to check list						x	
O2	To all task leaders							x

T1.5.3	QA throughout project ...							
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- O1—<< Output name >>—<< Month number >>—<< Month of year >>
- I1—<< Input name >>—<< Month number >>—<< Month of year >>
- d2—<< Mini-deliverable name >>—<< Month number >>—<< Month of year >>
- MS7—<< Milestone name >>—<< Month number >>—<< Month of year >>
- D3 << Deliverable name >>—<< Month number >>—<< Month of year >>

Task risks

There are no risks associated with this work

A.2 T2.1 Baseline study of stakeholders and stakeholder initiatives

Task description

The objectives of Task T2.1 are twofold. On one hand, it aims at creating a registry of relevant work on cost models for digital preservation; and on the other hand, it aims at identifying a group of stakeholders that potentially have interest or experience in digital preservation in order to consult them on their current state of practice regarding the assessment of digital preservation costs. The output of this task will then inform the Assessment group (WP3) on the most promising curation cost assessment initiatives and stakeholder status.

ID (T3.1)	Description	Deadline
D2.1	D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives	M06—July 13

T2.1.1 Registry of relevant work on cost modeling for digital preservation

Description:

This subtask aims at collecting and classifying published work and information on projects that address the issue of cost modeling relevant to the field of digital preservation. This register will be maintained and updated by Task T2.2.

Method:

This task will be supported by desk research.

Deliverables:

An online registry of relevant work and projects on the subject of cost modeling in digital preservation. The directory will be available to all project members in the form of a Web page or wiki. The platform for the registry should be easy to update and maintained by Task T2.2. It has to be decided if the registry will be open to people outside the project.

Inputs:

ID (T3.1)	Description	Deadline
IO2.1.1.1	I2.1.1.1 – Running project collaboration platform because it would be sensible to build up the initial register there (Decision about project collaboration platform to be taken by Project Management as part of WP 1).	M02 – March 13

Outputs:

ID (T3.1)	Description	Deadline
IO2.1.1.2	O2.1.1.1—A registry of publications and projects in the field of cost modeling in digital preservation. This output feeds into WP3.	M03—April 13

T2.1.2 Identification of stakeholders that have interest or experience in digital preservationDescription:

This subtask aims at identifying and characterizing the groups of stakeholders that will be consulted during the project. This task is particularly important as it will define the types of professionals that will to which all project outputs will be tailored for.

With the collaboration from all partners in the project, a list of person contacts will also be created. The output of this subtask will be a registry of stakeholder groups and person contacts for consultation. Also, any mailing lists that potentially allows us to outreach to a greater community with interest in the outputs of this project will also be considered. This registry will be maintained and updated by Task T2.2.

Method:

The types of stakeholders to be considered in the project will be devised by means of brainstorming. Already at the kick-off meeting an initial list of stakeholder types has been created to serve as a basis for further refinement.

Inputs:

ID (T3.1)	Description	Deadline
IO2.1.2.1	I2.1.2.1 – Person contacts and mailing list addresses. All partners in the project are expected to contribute with contacts of persons that fit under the types of stakeholders to be considered in the project.	M03—April 13

Outputs:

ID (T3.1)	Description	Deadline
IO2.1.2.2	O2.1.2.1—A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation. This output will feed into the next subtask—“Consultation of stakeholders”, but also to other Tasks in the project (e.g. T3.2, T3.3 and T3.4).	M03—April 13

T2.1.3 Consultation of stakeholders

Description:

This subtask aims at defining and applying a small set of questions to previously collected stakeholder contacts in order to grasp their state of practice in what concerns modeling and assessment of curation costs as well as to get information about their needs for cost information and the challenges they see in current work. This task will also analyze the answers received from the consultation and produce a summary report.

The questions to be included in the consultation are expected to be provided by the Assessment group (WP3), the main beneficiary of the outcomes of this task.

Method:

An online survey will be applied to the stakeholder’s contacts identified in T2.1.2. The survey may also be disseminated via mailing lists in order to approach a larger audience (depending on the size of the initial stakeholder register and communication methods of the identified stakeholder groups – it is very sensible for example to use the STM publishers mailing list in order to reach the stakeholder group “Publishers”, but we might want to approach other stakeholder groups differently, e.g. telephone or face to face if possible).

Inputs:

ID (T3.1)	Description	Deadline
IO2.1.3.1	I2.1.3.1—A list of stakeholder contacts and mailing lists addresses provided by the previous subtask.	M03—April 13
IO2.1.3.2	I2.1.3.2—A set of questions to be included in the consultation. The set of questions is expected to be provided by All.	M03—April 13
IO2.1.3.3	I2.1.3.3—A template on where to pour the results of this subtask. This template will be defined by the Information Dependency Profile provided by T3.1.	M05—June 13

Outputs:

ID (T3.1)	Description	Deadline
IO2.1.3.4	O2.1.3.1—A report on the results of the consultation in the format defined by the Information Dependency Profile (T3.1).	M06—July 13

Task dependencies and timing – inputs and outputs

No	Task	Resources	M1	M2	M3	M4	M5	M6
T2.1	Baseline Study of Stakeholders & Stakeholder Initiatives	1M		I2.1.1.1				D2.1
T2.1.1	Registry of relevant work on cost modeling for digital preservation	1M			O2.1.1.1			
T2.1.2	Identification of stakeholders that have interest or experience in digital preservation	1M			I2.1.2.1 O2.1.2.1			
T2.1.3	Consultation of stakeholders	2M			I2.1.3.1 I2.1.3.2		I2.1.3.3	O2.1.3.1

1. D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives—M6 – July
2. I2.1.1.1 (IO2.1.1.1)—Running project collaboration platform – M2—March
3. O2.1.1.1 (IO2.1.1.2)—A registry of publications and projects in the field of cost modeling in digital preservation – M3—April
4. I2.1.2.1 (IO2.1.2.1) – Person contacts and mailing list addresses – M3—April
5. O2.1.2.1 (IO2.1.2.2)—A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation—M3—April
6. I2.1.3.1 (IO2.1.3.1)—A list of stakeholder contacts and mailing lists addresses provided by the previous subtask—M3—April
7. I2.1.3.2 (IO2.1.3.2)—A set of questions to be included in the consultation. The set of questions is expected to be provided by the Assessment Group (WP3)—M3—April
8. I2.1.3.3 (IO2.1.3.3)—A template on where to pour the results of this subtask – M5—June
9. O2.1.3.1 (IO2.1.3.4)—A report on the results of the consultation in the format defined by the Information Dependency Profile (T3.1) – M6 – July.

Task risks

- R1—The Information Dependency Profile is not delivered on time (due on M5) and therefore the results of T2.1 (due in M6) are not delivered in the expected format.
- R2—The Assessment Group (WP3) does not provide a set of questions to include in the consultation to be performed in T2.1. This risk may be mitigated through constant dialog and special meetings to address this topic and through effective project management.
- R3—Project partners provide a very scarce list of person contacts to add to the registry of stakeholders, and therefore the consultation has a low rate of response.
- R4—The consultation done on T2.1 has a low rate of response making the results less valuable than initially anticipated.

A.3 T2.2 Maintain registry of stakeholders and stakeholder initiatives

Task description

The register of stakeholders and stakeholder initiatives that has resulted from T2.1 will be maintained and updated by this task during the lifetime of the project. It will enable and support the selection of representative contacts for interviews, focus groups and workshops to be delivered in T2.3 and T2.4. A mechanism will be devised to associate individuals, groups and institutions with the 4C project and an information exchange will be established with groups that do similar work (e.g. regular mutual status-updates; a joint news service).

Stakeholder groups from the private sector will be paid special attention. Consideration will be given in T1.6 (sustainability and benefits realisation) how this resource might be maintained beyond the duration of the project. The previous task ‘Communications planning and monitoring’ (T2.5), and the Project Communications Plan (D2.5) arising from this task, seek to outline each of the communications activities that will take place in order to achieve these aims. T2.6 seeks to execute that plan.

Task 2.2 deliverables:

Maintain Register of Stakeholder & Stakeholder Initiatives: Register of stakeholders and relevant work (likely to be a spreadsheet or wiki page where 4C organises the identified stakeholders, including individuals that work on curation costings and other individuals and groups who might be interested or convinced by the work that 4C is doing).

Staff involved:

Joy Davidson, DCC-HATII; Patrick McCann, DCC-HATII; Kevin Ashley, DCC-UEDIN, TBC, DCC-UEDIN,

Delivery date:

Month 24

Sub-Tasks

T2.2.1 – identify and implement mechanism to capture stakeholders’ details (Joy Davidson, DCC-HATII, Patrick McCann, DCC-HATII)

Description:

To identify an appropriate means of capturing, storing and accessing stakeholders contact details.

Method:

This task will enable project staff to record, plan and monitor communications with our stakeholder groups. Project Partners will be identify the key information to be captured for each stakeholder group in T2.1.1 and T2.1.2. This information will be presented through stakeholder registry. In the DoW, a spreadsheet or wiki page was identified as the likely mechanism for capturing and sharing stakeholder details. However, following early discussions within WP2, it became clear that the project would benefit from employing customer relationship management (CRM) software to capture and manages stakeholder information. Two options are being investigated.

- 1) SugarCRM—open source, free

2) CRMery—not free, but can be integrated with Joomla website

Following a review of both products in cooperation with DPC, we recommend using CRMery. While there is a small charge associated with licensing and installing this option (£950), it provides a much simpler and sustainable approach to recording and managing stakeholders information and can be integrated into the Joomla website that is being set up in T2.6.1. Identify which project partners should have access to the CRM (all, some).

Inputs:

ID (T3.1)	Description	Deadline
IO2.2.1.1	I2.2.1.1 – input from T2.6 on website development and costs of related CRM options	M04 – May 2013
IO2.2.1.2	I2.2.1.2 – input from colleagues at DCC on use of SugarCRM	M04 – May 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.2.1.3	O2.2.1.1 – short summary of options and recommendation for mechanism to capture stakeholder information	M04 – May 2013
IO2.2.1.4	O2.2.1.2 – installation of CRM	M04 – May 2013
IO2.2.1.5	O2.2.1.3 – user accounts created for selected 4C project staff	M04 – May 2013

Timescale:

Completed in month 4

T2.2.2 – migrating data captured in 2.1 into CRM (Patrick McCann, DCC-HATI)**Description:**

To migrate data captured in task 2.1 into the selected CRM.

Method:

Work with partners in 2.1 to define the fields of information that need to be captured for each stakeholder. Build these fields into the CRM and migrate stakeholder information into the CRM from Dropbox files.

Inputs:

ID (T3.1)	Description	Deadline
IO2.1.2.2	O2.1.2.1—A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation	M04 – May 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.2.2.1	O2.2.2.1—populated CRM with stakeholders	M04 – May 2013

Timescale:

Completed in month 4

T2.2.3 – develop data management plan for information held within CRM (TCB, DCC-UEDIN, Patrick McCann, DCC-HATII)

Description:

In consultation with other project partners, determine any potential restrictions on using the data that is captured and held within the CRM. Develop appropriate terms and conditions on data retention and use for any information that is provided by stakeholders.

Method:

Working closely with colleagues developing the Communications Plan, this task will ensure that 4C manages the data collected from stakeholders and ensure that reuse is in line with our terms and conditions. Determine what information can be made publicly visible via 4C website (i.e., a public list of stakeholders we've engaged with).

Inputs:

ID (T3.1)	Description	Deadline
D2.5	O2.6—4C Project Communications Plan	M05 – June 2013
IO2.3.2.2	O2.3.1.1—Extensible framework interview template (= one or several lists of questions)	M06 – July 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.2.3.1	O2.2.3.1—set of terms and conditions for contacts who provide us with contact data	M06 – July 2013
IO2.2.3.2	O2.2.3.2—data management plan for stakeholder information held within CRM	M06 – July 2013
IO2.2.3.3	O2.2.3.3—up to date, public list of stakeholder institutions that can be disseminated via the 4C website	M06 – July 13

Timescale:

Month 6-24

Sub-task T2.2.4 – updating stakeholder registry (TBC, DCC-UEDIN)**Description:**

In consultation with other project partners, ensure that new stakeholders are entered into the CRM as necessary and that the information conforms to the CRM fields.

Method:

Following initial consultation exercise that is carried out in T2.1.3, add in new stakeholders to the registry. New stakeholders will be added following focus group sessions, workshops and the conference. Monitor blog posts and social media to identify new stakeholders .

Inputs:

ID (T3.1)	Description	Deadline
IO2.1.3.4	O2.1.3.1—A report on the results of the consultation	M06 – July 2013
IO2.3.2.4	O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives	Iterative
IO2.3.2.6	<i>O2.3.2.3—Information/Feedback for the Enhancement group</i>	Iterative
IO2.3.2.7	<i>O2.3.2.4—Feedback about Roadmap for the Roadmap group?</i>	Iterative
IO2.3.2.8	O2.3.2.5—information about stakeholders for the Final Stakeholder Report (D2.3)	Iterative
IO2.3.3.1	O2.3.3.1—Focus Group 1 report	M09—Oct 13
IO2.3.3.2	O2.3.3.2—Focus Group 2 report	M12—Jan 14

IO2.3.3.3	O2.3.3.3—Focus Group 3 report	M15—April 14
IO2.3.3.4	O2.3.3.4—Focus Group 4 report	M18 – July 14

Outputs:

ID (T3.1)	Description	Deadline
IO2.4.4.1	O2.2.4.1—Up to date CRM	Iterative

Timescale:

Month 4-24

Sub-task T2.2.5 – sustain stakeholder registry (Joy Davidson, DCC-HATII, Kevin Ashley, DCC-UEDIN)**Description:**

Work with our community and Manuela Speiser, Project Officer to identify where the stakeholder registry should be maintained for the longer-term (EC, by 4C partners, elsewhere) and identify possible ways to sustain the community that has been developed following the end of 4C.

Method:

4C will gather and record information from our stakeholders through our series of focus groups, workshops and consultations. As part of this ongoing work, 4C will seek input from the community as it develops on how we might best maintain links with each other throughout the project and how the community might be sustained following the end of the project.

Inputs:

ID (T3.1)	Description	Deadline
IO2.1.3.4	O2.1.3.1—A report on the results of the consultation	M06 – July 2013
IO2.2.3.1	O2.2.3.1—set of terms and conditions for contacts who provide us with contact data	M06 – July 2013
IO2.2.3.2	O2.2.3.2—data management plan for stakeholder information held within CRM	M06 – July 2013
IO2.3.2.4	O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives	Iterative
IO2.3.2.6	<i>O2.3.2.3—Information/Feedback for the Enhancement group</i>	Iterative
IO2.3.2.7	<i>O2.3.2.4—Feedback about Roadmap for the Roadmap group?</i>	Iterative

IO2.3.2.8	O2.3.2.5—Information about stakeholders for the Final Stakeholder Report (D2.3)	Iterative
IO2.3.3.1	O2.3.3.1—Focus Group 1 report	M09—Oct 13
IO2.3.3.2	O2.3.3.2—Focus Group 2 report	M12—Jan 14
IO2.3.3.3	O2.3.3.3—Focus Group 3 report	M15—April 14
IO2.3.3.4	O2.3.3.4—Focus Group 4 report	M18—July 14

Outputs:

ID (T3.1)	Description	Deadline
IO2.2.5.1	O2.2.5.1—Plan to sustain the stakeholders registry developed in consultation with our user communities and EC	M24—Jan 2015

Timescale:

Month 20-24

Task dependencies and timing—inputs and outputs

No	Task	Resources	M1	M2	M3	M4	M5	M6
T2.2.1	Identify and implement mechanism to capture stakeholders' details					X		
	I2.2.1.1—input from T2.6 on website development and costs of related CRM options				X			
	I2.2.1.2—input from colleagues at DCC on use of SugarCRM				X			
T2.2.2	Migrating data captured in 2.1 into CRM					X		
	O2.1.2.1—A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation				X			
T2.2.3	Develop data management plan for information held within CRM							X
	O2.6—4C Project Communications Plan				X			

No	Task	Resources	M1	M2	M3	M4	M5	M6
	O2.3.1.1—Extensible framework interview template (= one or several lists of questions)				X			
T2.2.4	Updating stakeholder registry					X		
	O2.1.3.1—A report on the results of the consultation							X
	O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives						X	
	<i>O2.3.2.3—Information/Feedback for the Enhancement group?</i>						X	
	<i>O2.3.2.4—Feedback about Roadmap for the Roadmap group?</i>							M18
	O2.3.2.5—Information about stakeholders for the Final Stakeholder Report (D2.3)							M24
	O2.3.3.1—Focus Group 1 report							M9
	O2.3.3.2—Focus Group 2 report							M12
	O2.3.3.3—Focus Group 3 report							M15
	O2.3.3.4—Focus Group 4 report							M18
T2.2.5	Sustain stakeholder registry							M20
	O2.1.3.1—A report on the results of the consultation							X
	O2.2.3.1—set of terms and conditions for contacts who provide us with contact data							X

No	Task	Resources	M1	M2	M3	M4	M5	M6
	O2.2.3.2—data management plan for stakeholder information held within CRM							X
	O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives						X	
	<i>O2.3.2.3—Information/Feedback for the Enhancement group?</i>						X	
	<i>O2.3.2.4—Feedback about Roadmap for the Roadmap group?</i>							Iterative
	O2.3.2.5—Information about stakeholders for the Final Stakeholder Report (D2.3)							M24
	O2.3.3.1—Focus Group 1 report							M9
	O2.3.3.2—Focus Group 2 report							M12
	O2.3.3.3—Focus Group 3 report							M15
	O2.3.3.4—Focus Group 4 report							M18

Inputs:

- I2.2.1.1—input from T2.6 on website development and costs of related CRM options
- I2.2.1.2—input from colleagues at DCC on use of SugarCRM
- O2.1.2.1—A characterization of stakeholders coupled with a list of contacts and mailing lists addresses or consultation
- O2.6—4C Project Communications Plan
- O2.3.1.1—Extensible framework interview template (= one or several lists of questions)
- O2.1.3.1—A report on the results of the consultation
- O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives
- *O2.3.2.3—Information/Feedback for the Enhancement group?*
- *O2.3.2.4—Feedback about Roadmap for the Roadmap group?*

- O2.3.2.5—Information about stakeholders for the Final Stakeholder Report (D2.3)
- O2.3.3.1—Focus Group 1 report
- O2.3.3.2—Focus Group 2 report
- O2.3.3.3—Focus Group 3 report
- O2.3.3.4—Focus Group 4 report

Outputs:

- O2.2.1.1—short summary of options and recommendation for mechanism to capture stakeholder information
- O2.2.1.2—installation of CRM
- O2.2.1.3—user accounts created for selected 4C project staff
- O2.2.2.1—populated CRM with stakeholders
- O2.2.3—data management plan for stakeholder information held within CRM
- O2.2.4.1—Up to date CRM
- O2.2.5.1—Plan to sustain the stakeholders registry developed in consultation with our user communities and EC

Task risks**WP2 general: Reaching stakeholder groups from the private sector**

Mitigation: In WP2 DoW description, we state ‘Stakeholder groups from the private sector will be paid special attention’. This is already proving more difficult than anticipated. It may be wise for us to clarify this statement to include ‘private sector stakeholders and any others found to be under-represented in the register.’

D2.2 general—Maintain Register of Stakeholder & Stakeholder Initiatives

The DoW lists the register as a public deliverable. The terms and conditions we develop for the registry will need to be clear about this. I’d recommend that we develop a web-based list of stakeholders we’re engaged with for dissemination via the 4C website based on some basic information captured in the CRM.

T2.2.1—CRM is too difficult to set up and maintain

Mitigation: Working with colleagues at DPC and DCC, we’ll identify pros and cons for each of the proposed CRM systems and seek feedback on ease of use and maintenance. Configuring the CRM to best meet our needs will require significant effort initially. However, early effort to configure the CRM against the profiles or stakeholders and the 4C Communication Plan will help us to ensure that targeted communications are made at the right time with the right messages.

T2.2.2 –Confusion over what platform project staff should use to draft and share project documents and deliverables (Google Docs, DropBox)

Mitigation: Project Management team should determine whether they want a project-wide approach or if each WP lead will decide what platform they want to use. Either way, clear guidelines for staff should be developed as soon as possible. The preferred platform(s) should be captured in the internal communications section of the communications plan.

T2.2.3—Breaching data protection by sharing personal details

Develop a set of terms and conditions to make clear what information will be made public. In the DoW, the registry will be a public deliverable, so perhaps we only list institutions rather than individuals?

T2.2.4—Not capturing new contacts that are identified throughout the life of the project

Mitigation: We should aim to develop plans within each WP to identify when and how additional contacts may be identified and entered into the CRM. These plans should be noted within the communication plan.

T2.2.5—Stakeholder registry is not sustained beyond life of project

Mitigation: Develop appropriate terms and conditions to enable us to retain contact data following the life of the project (at personal level within CRM and public list of stakeholders). Work with our community and Manuela Speiser, Project Officer to identify where the stakeholder registry should be maintained for the longer-term.

A.4 T2.3 Engage with stakeholders

Task description

Based on the stakeholder analysis 4-6 different audiences will be targeted. These might include: data intensive industry; big data science; digital preservation solution/storage vendors; small and medium enterprises (SMEs); publishers; memory institutions; government agencies and research funders. Stakeholder engagement with different groups might require a flexible methodology, i.e., we may target our audiences individually or in groups, we can do structured telephone interviews, email surveys, online surveys, discussion groups, feedback rounds.... An extensible framework interview template will be created to facilitate in-depth interviews/ mini-consultations with selected representative stakeholders (starts in M4). Focus group meetings will be organized for each stakeholder group to understand their needs and requirements and to gain a better understanding of their views on the nature of cost, benefit, value, sustainability, etc. The focus groups will ideally be attached to a key event that is of relevance to the respective stakeholder group, e.g. iPRES 2013 in Lisbon, CeBit, International Conference on Electronic Publishing, etc. As far as possible input will be gathered from stakeholders according to the requirements set out in the Information Dependency Profile (T3.1). This will act as a checklist of useful categories of metrics that will facilitate effective quantitative information gathering. Useful intelligence (including qualitative data) relating to digital curation cost determinants will be passed to the Assessment group for analysis and synthesis. A synthesis, summary and evaluation of engagement activity will be reported at the close of the project in the form of a Stakeholder Report (D2.3).

ID (T3.1)	Description	Deadline
D2.3	Final Stakeholder Report	M24—Jan 15
MS6	MS6—Semi-Structured Interview Template	M04—May 13
MS11	Focus Group Meeting 1	M08—Sep 13
MS14	Focus Group Meeting 2	M11—Dec 13
MS19	Focus Group Meeting 3	M14—March 14
MS20	Focus Group Meeting 4	M17—June 14

T2.3.1 Extensible framework interview template

Description:

This subtask aims at creating an extensible framework interview template to facilitate in-depth interviews/ mini-consultations with selected representative stakeholders.

Method:

Requirement analysis (on information needs in WP 2, WP3 and WP4), possibly supported by brainstorming, resulting in editorial work on the template

Deliverables:

A word document or a set of word documents, each with a list of questions that can be used to gather input from stakeholders in T2.3.2.

Inputs:

ID (T3.1)	Description	Deadline
IO2.3.1.1	I2.3.1.1—Input which information are needed from which stakeholders in WP 3 and WP 4. (T3.1).	M03—April 13

Outputs:

ID (T3.1)	Description	Deadline
See below (IO2.3.2.2)	O2.3.1.1—Extensible framework interview template (= one or several lists of questions)	MO4—May 13

T2.3.2 Interaction with selected representative stakeholdersDescription:

This subtask allows us to approach interesting stakeholders in between Focus Group meetings. We may also want to use it to prepare Focus Groups meetings or to follow them up.

Method:

Flexible methodology depending on why we approach a certain individual or stakeholder group: Structured telephone interviews facilitated by the interview template for in-depth insights, email surveys and/or online surveys for quantitative information collection, discussion groups / feedback rounds to test initial project results (the latter only where they can conveniently be attached to events of individual project participants).

Inputs:

ID (T3.1)	Description	Deadline
IO2.3.2.1	I2.3.2.1—Stakeholder matrix (may come from Communications Plan or T2.1?)	M05—June 13
IO2.3.2.2	I2.3.2.2—Extensible framework interview template	M04—May 13
IO2.3.2.3	I2.3.2.3—Requirements / checklists to facilitate quantitative information gathering (to be set out in T3.1)	M05—June 13

Outputs:

ID (T3.1)	Description	Deadline
IO2.3.2.4	O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives	Iterative
IO2.3.2.5	O2.3.2.2—Information relating to digital curation cost determinants for the Assessment group	Iterative
IO2.3.2.6	<i>O2.3.2.3—Information/Feedback for the Enhancement group?</i>	Iterative
IO2.3.2.7	<i>O2.3.2.4—Feedback about Roadmap for the Roadmap group?</i>	Iterative
IO2.3.2.8	O2.3.2.5—Information about stakeholders for the Final Stakeholder Report (D2.3)	Iterative

T2.3.3 Focus group meetingsDescription:

Focus group meetings will be organized for each stakeholder group to understand their needs and requirements and to gain a better understanding of their views on the nature of cost, benefit, value, sustainability, etc. The focus groups will ideally be attached to a key event that is of relevance to the respective stakeholder group, e.g. iPRES 2013 in Lisbon, CeBit, International Conference on Electronic Publishing, etc. As far as possible input will be gathered from stakeholders according to the requirements set out in the Information Dependency Profile (T3.1). This will act as a checklist of useful categories of metrics that will facilitate effective quantitative information gathering.

Method:

Interactive group sessions, e.g. with a motivational presentation, followed by structured group discussion with presentation wall / flip charts, optional: break out groups

Inputs:

ID (T3.1)	Description	Deadline
See above (IO2.3.2.1)	I2.3.2.1—Stakeholder matrix (may come from Communications Plan or T2.1?)	M05—June 13
See above (IO2.3.2.3)	I2.3.2.3—Requirements / checklists to facilitate quantitative information gathering (to be set out in T3.1)	M05—June 13

Outputs:

ID (T3.1)	Description	Deadline
IO2.3.3.1	O2.3.3.1—Focus Group 1 report	M09—Oct 13
IO2.3.3.2	O2.3.3.2—Focus Group 2 report	M12—Jan 14
IO2.3.3.3	O2.3.3.3—Focus Group 3 report	M15—April 14
IO2.3.3.4	O2.3.3.4—Focus Group 4 report	M18—July 14

Task dependencies and timing—inputs and outputs

		1	2	3	4	5	6	7	8	9
No	Task	Feb	March	Apr	May	Jun	July	Aug	Sep	Oct
2.3	Engage with stakeholders									
T2.3.1	Extensible framework interview template			I2.3.1.1	O2.3.1.1					
T2.3.2	Interaction with selected representative stakeholders				I.2.3.2.2	I2.3.2.1 I2.3.2.3				
T2.4.3	Focus group meetings					I2.3.2.1 I2.3.2.3			⌠	O2.3.3.1

	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
No	Nov	Dec	Jan	Feb	March	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan
2.3															D
T2.3.1															
T2.3.2															
T2.4.3		⌠	O2.3.3.2		⌠	O2.3.3.3		⌠	O2.3.3.4						

Inputs:

- I2.3.1.1—Input which information are needed from which stakeholders in WP 3 and WP 4.
- I2.3.2.1—Stakeholder matrix (may come from Communications Plan or T2.1?)
- I2.3.2.2—Extensible framework interview template
- I2.3.2.3—Requirements / checklists to facilitate quantitative information gathering (to be set out in T3.1)

Outputs:

- O2.3.1.1—Extensible framework interview template (= one or several lists of questions)
- O2.3.2.1—Information that triggers updates of the Register of Stakeholders & Stakeholder Initiatives
- O2.3.2.2—Information relating to digital curation cost determinants for the Assessment group
- O2.3.2.3—Information/Feedback for the Enhancement group?
- O2.3.2.4—Feedback about Roadmap for the Roadmap group?
- O2.3.2.5—Information about stakeholders for the Final Stakeholder Report (D2.3)
- O2.3.3.1—Focus Group 1 report
- O2.3.3.2—Focus Group 2 report
- O2.3.3.3—Focus Group 3 report
- O2.3.3.4—Focus Group 4 report

Task risks

A.5 T2.4 Outreach events

Task description

Two workshops will be organised along with a final project conference and all three events will aim for international impact and participation. The workshops will crucially also have an awareness-raising and training remit. The final project conference will showcase the draft project findings, disseminate messages, and try to consolidate and sustain the emerging network and community that will have been defined.

ID (T3.1)	Description	Deadline
D2.4	D2.4—Final Report on Outreach Events	M24—Jan 15
MS11	MS11—Outreach Workshop 1	M08—Sep 13
MS21	MS21—Outreach Workshop 2	M17—June 14
MS25	MS25—4C Conference	M21—Oct 14

T2.4.1 Workshop no. 1

Description:

While we “listen” to our stakeholders in the focus groups, the purpose of the workshops is to spread the word about digital preservation costs and intermediate project results to an international audience. The workshop has to be delivered in M8 (Sep. 2013), together with the first Focus Group meeting.

Method:

Attach workshop to iPres conference in Lisbon in September 2013 which will facilitate logistics. The workshop shall consist of a mix of presentations (delivered by project partners and/or interesting stakeholders) and discussion sessions.

Deliverables:

Workshop report

Inputs:

ID (T3.1)	Description	Deadline
D2.1	I2.4.1.1—D2.1 Baseline Study of Stakeholders & Stakeholder Initiatives	M06—July 2013
D4.1	I2.4.1.2— “Reportable” results from WP 3 and WP 4 in form of presentations, e.g, D4.1 Prioritised Assessment of Indirect Economic Determinants (due in M6)	M06—July 2013

MS9	I2.4.1.2— “Reportable” results from WP 3 and WP 4 in form of presentations, e.g, D4.1 Prioritised Assessment of Indirect Economic Determinants (due in M6)	M06—July 2013
IO2.4.1.1	O2.4.1.1—Workshop report to be fed into D2.4 Final Report on Outreach Events	M09—Oct 13

Outputs:

ID (T3.1)	Description	Deadline
IO2.4.1.1	O2.4.1.1—Workshop report to be fed into D2.4 Final Report on Outreach Events	M09—Oct 13

T2.4.2 Workshop no. 2Description:

See above with the only difference that the workshop is due in M 17 (June 2014)

Method:

Attach workshop to a still to be defined event in June 2014 in order to facilitate logistics. Again, mix of presentations and discussion sessions.

Inputs:

ID (T3.1)	Description	Deadline
MS12	I2.4.2.1+I2.4.2.2 —“Reportable” results from WP 3 and WP 4 in form of presentations, e.g., D3.1 Evaluation of Cost Models & Needs & Gap Analysis (due in M12) + D 4.3 Report on Trustworthiness and Quality (due in M12), or Draft D3.2 Cost Concept Model & Gateway Requirement Specification	M09—October 2013
D3.1	I2.4.2.1+I2.4.2.2—“Reportable” results from WP 3 and WP 4 in form of presentations, e.g., D3.1 Evaluation of Cost Models & Needs & Gap Analysis (due in M12) + D 4.3 Report on Trustworthiness and Quality (due in M12), or Draft D3.2 Cost Concept Model & Gateway Requirement Specification	M12—January 2014
MS17	I2.4.2.1+I2.4.2.2—“Reportable” results from WP 3 and WP 4 in form of presentations, e.g., D3.1 Evaluation of Cost Models & Needs & Gap Analysis (due in M12) + D 4.3 Report on Trustworthiness and Quality (due in M12), or Draft D3.2 Cost Concept Model & Gateway Requirement Specification	M12—January 2014

MS18	I2.4.2.1+I2.4.2.2—“Reportable” results from WP 3 and WP 4 in form of presentations, e.g., D3.1 Evaluation of Cost Models & Needs & Gap Analysis (due in M12) + D 4.3 Report on Trustworthiness and Quality (due in M12), or Draft D3.2 Cost Concept Model & Gateway Requirement Specification	M12—January 2014
D4.3	I2.4.2.1+I2.4.2.2—“Reportable” results from WP 3 and WP 4 in form of presentations, e.g., D3.1 Evaluation of Cost Models & Needs & Gap Analysis (due in M12) + D 4.3 Report on Trustworthiness and Quality (due in M12), or Draft D3.2 Cost Concept Model & Gateway Requirement Specification	M12—January 2014

Outputs:

ID (T3.1)	Description	Deadline
IO2.4.2.1	O2.4.2.1—Workshop report to be fed into D2.4 Final Report on Outreach Events	M18—July 14

T2.4.3 Project Conference

Description: Showcase the draft project findings, disseminate messages, and try to consolidate and sustain the emerging network and community that will have been defined. Should include a workshop to gather and clarify stakeholder input into the roadmap (=Task 5.2). The Conference is due in M21 (October 2014).

Method: Stand alone event, to be advertised as “Digital Curation Cost Conference” rather than “4C Final Project Conference”. Mix of talks, presentations, (demonstration of CCEx?) and discussion sessions.

Inputs:

ID (T3.1)	Description	Deadline
D4.4	I2.4.3.1—D 4.4 Report on Risk, Benefit, Impact and Value (due in M18)	M18—July 2014
D3.3	I2.4.3.2—D3.3 Curation Costs Exchange Framework (due in M21)	M21—October 2014
IO2.4.3.1	I2.4.3.3— Draft D2.8 CCEx (due in M24)	M24—January 2015
D5.1	I2.4.3.4—Draft WP5 Roadmap in order to enable the Task 5.2 workshop.	M16—May 2014
D4.2	(I2.4.3.5—Draft D4.2 Assessment of Community Validation of the Economic Sustainability Reference Model?)	M24—January 2015

Outputs:

ID (T3.1)	Description	Deadline
IO2.4.3.2	O2.4.3.1—Conference report to be fed into D2.4 Final Report on Outreach Events	M18—July 2014

Task dependencies and timing—inputs and outputs

All project participants must be prepared for the possibility to take part in the workshop as presenter!

		6	7	8	9	10	11	12
No	Task	July	Aug	Sep	Oct	Nov	Dec	Jan
2.4	Outreach Events							
T2.4.1	Workshop no. 1		I2.4.1.1 I2.4.1.2	⌠	O2.4.1.1			
T2.4.2	Workshop no. 2							I2.4.2.1 I2.4.2.2
T2.4.3	Project Conference							

		13	14	15	16	17	18	19	20	21	22	23	24
No	Task	Feb	March	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan
2.3													D
T2.4.1													
T2.4.2						⌠	O2.4.2.1						
T2.4.3							I2.4.3.1			I2.4.3.2	⌠	O2.4.3.1	

Inputs:

- I2.4.1.1—D2.1 Baseline Study of Stakeholders & Stakeholder Initiatives
- I2.4.1.2— “Reportable” results from WP 3 and WP 4 in form of presentations, e.g, D4.1 Prioritised Assessment of Indirect Economic Determinants (due in M6)
- I2.4.2.1—“Reportable” results from WP 3 and WP 4 in form of presentations, e.g., D3.1 Evaluation of Cost Models & Needs & Gap Analysis (due in M12) or

- I2.4.2.2—D 4.3 Report on Trustworthiness and Quality (due in M12), or Draft D3.2 Cost Concept Model & Gateway Requirement Specification
- I2.4.3.1—D 4.4 Report on Risk, Benefit, Impact and Value (due in M18)
- I2.4.3.2—D3.3 Curation Costs Exchange Framework (due in M21)
- I2.4.3.3— Draft D2.8 CCEX (due in M24)
- I2.4.3.4—Draft WP5 Roadmap in order to enable the Task 5.2 workshop.
- (I2.4.3.5—Draft D4.2 Assessment of Community Validation of the Economic Sustainability Reference Model?)

Outputs:

- O2.4.1.1—Workshop report to be fed into D2.4 Final Report on Outreach Events
- O2.4.2.1—Workshop report to be fed into D2.4 Final Report on Outreach Events
- O2.4.3.1—Conference report to be fed into D2.4 Final Report on Outreach Event

Task risks

A.6 T2.5 Communication planning and monitoring

Task description

Task 2.5 exists to plan, monitor and report communications between 4C project and its stakeholders throughout the active phases of the project. The work package is concerned not simply with dissemination but with two way communication, giving strategic and practical shape to the ‘open and social’ ethos of the project and thus contributing to the effectiveness of solutions by ensuring users’ needs are taken into account, and maximizing the uptake of solutions by disseminating information about them to target groups. It will ensure that communications are reported to the commission and will provide information to project management to ensure that reasonable targets for communications are established met or exceeded where possible. In the early phases it will manage expectations about the project and in the longer term it will anticipate the long term use of resources by providing early but clear communications about outcomes to the user community.

This task has one early deliverable—the establishment of a communications plan (month 5) followed by periodic reporting against the plan (month 12 and month 24).

Sub-task T2.5.1—Initial Communications

Description: To initiate communications early in the project prior to the adoption of the communications plan

Method: This task will ensure that the project fulfills its promise to ‘start dissemination in month one’. This necessitates some initial work which is consistent with the DoW but which pre-figures the full communications plan or stakeholder analysis, and which may in retrospect seem unstructured. The key message in all of these communications is simply that the 4C project has begun and wants to engage users. To achieve this, a series of simple tasks will be undertaken like establishing an early project domain and website, establish the project twitter account, draft a detailed briefing paper describing the project, issuing a press release about the project, and thoughtful and frequent contributions to the community via regular blog posts.

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO2.5.1.1	d2.5.1 early website	M05—June 2013
IO2.5.1.2	d2.5.2 twitter account and twitter traffic	M05—June 2013
IO2.5.1.3	d2.5.3 briefing note on project	M05—June 2013
IO2.5.1.4	d2.5.4 press release announcing start of project	M05—June 2013
IO2.5.1.5	d2.5.5 early blog postings	M05—June 2013

Inputs: i1DoW,

ID (T3.1)	Description	Deadline
IO2.5.1.6	i2 other communications plans	M05—June 2013
D2.1	Baseline Study of Stakeholders & Stakeholder Initiatives	M05—June 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.5.1.7	O1contribution to communications plan D2.5	M05—June 2013
IO2.5.1.8	O2 contribution to communications report D2.6	M05—June 2013
IO2.5.1.9	O3 contribution to developed website D2.7	M05—June 2013

Timescale—completed by end of June

Sub-task T2.5.2—First draft of Communications Plan

Description: Delivery of first draft of communications plan for comment by project management board.

Method: The description of work contains a descriptive outline which forms the basis of an effective communications plan for the project which is clear about ethos and strategic purpose, but without providing details about stakeholders, channels or performance indicators, nor with any detailed analysis of timing and messages. Therefore the relevant sections of the description of work will be adapted to create a thorough planning document that can be reviewed and adopted by the project. This will be an open document throughout the lifetime of the project, and the first draft will be provided to the project management board for comment prior to adoption.

The plan will be drafted by DPC senior project officer based on models supplied from existing communication plans (version 1). It will be reviewed first by the DPC executive director who will give outline comments and version 2 will be circulated to other DPC senior project officers acting as peer reviewers, to produce a further iteration. Version 3 will then be circulated to WP2 members with particular interest in the task (DCC, DNB, Keeps) for comment, and a further version produced. Version 5 will be sent to the whole project and the project management board for comment, to ensure that WP3, 4 and 5 are properly represented. A final version (version 6) will be presented to the project management board for adoption. The adopted plan will be presented to all partners in the project.

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO2.5.2.1	d2.5.6 first draft of communications plan	M05—June 2013
D2.5	D2.5 approved communications plan	M05—June 2013

Inputs: I1 DoW,

ID (T3.1)	Description	Deadline
IO2.5.1.6	I2 other communications plans	M05—June 2013
D2.1	Baseline Study of Stakeholders & Stakeholder Initiatives	M05—June 2013
IO2.5.2.2	I4 comments from partners involved in (T2.1, 2.2, 2.3)	M05—June 2013
IO2.5.2.3	I5 Alignment with project management methods (T1.1)	M05—June 2013
IO2.5.2.4	I6 Project Quality plan (T1.5)	M05—June 2013
IO2.5.2.5	I7 Inputs to understand and represent WP 3, 4 and 5	M05—June 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.5.2.6	O4 Draft communications plan	M05—June 2013
IO2.5.2.7	O5 Comments on draft plan	M05—June 2013
IO2.5.2.8	O6 Finalized plan	M05—June 2013

Timescale—by end of June

Sub-task T2.5.3—Adopt Communications Plan

Description: This task ensures the communications plan is adopted by all in the project and that all members of the project understand and support it.

Method: The finalized communications plan will be made available to the whole project and an agenda item will be included in a relevant team meeting shortly after approval. Task leads will be asked to invoke the communications plan to support their own activities and workpackage leads will ensure compliance and provide suggestions about emerging opportunities.

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO2.5.3.1	d2.5.7 Email to all members sharing the plan	M05—June 2013
IO2.5.3.2	d2.5.8 Agenda item in project meeting about the plan	M06—July 2013

Inputs: I1 Description of Work

ID (T3.1)	Description	Deadline
IO2.5.3.3	I8 Initial communications (d2.5.1-5)	M05—June 2013
D2.5	I9 Communications Plan (D2.5)	M05—June 2013
D2.1	i3 Stakeholder analysis (D2.1)	M05—June 2013
D2.2	i4 Stakeholder register (D2.2)	Iterative
IO2.5.2.3	i5 Alignment with project management (T1.1)	M05—June 2013
IO2.5.2.4	I6 Project Quality Plan (T1.5)	M05—June 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.5.3.4	O7 Contribution to review of all public deliverables—D1.1, D1.2, D2.1, D2.2, D2.3, D2.4, D2.5, D2.6, D2.7, D2.8, D3.1, D3.2, D3.3, D4.1, D4.2, D4.3, D4.4, D4.5, D5.1, D5.2	Iterative

Timescale—June 2013 onwards

Sub-task T2.5.4—Report Communications

Description: This sub-task provides a periodic summary of communications, reporting to the project board and the European Commission. Performance against indicators will be included and recommendations will be provided on new channels. There will be quarterly internal reports to the project board, an annual report to the European Commission and an end of project evaluation report

Method: A standard reporting template will be sent to all partners at the end of each quarter to be completed. Responses will be collated and presented to the project board

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO2.5.4.1	d2.5.9 reporting template	M05—June 2013
IO2.5.4.2	d2.5.10 quarterly report 1	M05—June 2013
IO2.5.4.3	d2.5.11 quarterly report 2	M06—July 2013
IO2.5.4.4	d2.5.12 quarterly report 3	M09—October 2013
IO2.5.4.5	d2.5.13 quarterly report 4	M12—Jan 2014

ID (T3.1)	Description	Deadline
IO2.5.4.6	d2.5.14 Annual report (year one)	M12—Jan 2014
IO2.5.4.7	d2.5.15 quarterly report 5	M15—April 2014
IO2.5.4.8	d2.5.16 quarterly report 6	M18—July 2014
IO2.5.4.9	d2.5.17 quarterly report 7	M21—October 2014
IO2.5.4.10	d2.5.18 quarterly report 8	M24—Jan 2015
IO2.5.4.11	d2.5.19 End of project report	M24—Jan 2015

Inputs: I1 Description of work

ID (T3.1)	Description	Deadline
D2.5	I9 Communications plan	M05—June 2013
IO2.5.4.12	I10 Partner quarterly reports	M05—June 2013
IO2.5.4.13	I10 Partner quarterly reports	M06—July 2013
IO2.5.4.14	I10 Partner quarterly reports	M09—October 2013
IO2.5.4.15	I10 Partner quarterly reports	M12—Jan 2014
IO2.5.4.16	I10 Partner quarterly reports	M15—April 2014
IO2.5.4.17	I10 Partner quarterly reports	M18—July 2014
IO2.5.4.18	I10 Partner quarterly reports	M21—October 2014
IO2.5.4.19	I10 Partner quarterly reports	M24—Jan 2015

Outputs:

ID (T3.1)	Description	Deadline
IO2.5.4.1	d2.5.9 reporting template	M05—June 2013
IO2.5.4.2	d2.5.10 quarterly report 1	M05—June 2013
IO2.5.4.3	d2.5.11 quarterly report 2	M06—July 2013
IO2.5.4.4	d2.5.12 quarterly report 3	M09—October 2013

ID (T3.1)	Description	Deadline
IO2.5.4.5	d2.5.13 quarterly report 4	M12—Jan 2014
IO2.5.4.6	d2.5.14 Annual report (year one)	M12—Jan 2014
IO2.5.4.7	d2.5.15 quarterly report 5	M15—April 2014
IO2.5.4.8	d2.5.16 quarterly report 6	M18—July 2014
IO2.5.4.9	d2.5.17 quarterly report 7	M21—October 2014
IO2.5.4.10	d2.5.18 quarterly report 8	M24—Jan 2015
IO2.5.4.11	d2.5.19 End of project report	M24—Jan 2015

Timescale—May 2013-Feb 2015

Sub-task T2.5.5—Update and Review Communications plan

Description: The communications plan is an open document and updates and revisions are to be expected. These may be proposed either through the Task lead for 2.5, through WP2 meetings, through project board meetings, or via all hands meetings. In addition, monitoring against performance indicators will provide a sense of strengths and weaknesses. Minor changes will be approved on an on-going basis while a formal revision will be made at the end of the first year.

Method: The document will be managed and tracked by the DPC for the project. Suggestions or changes will be received by DPC on an ongoing basis from partners and where appropriate included in the document. Formal review of performance against communications will be undertaken by the project board. A full revision will take place at the end of year one, incorporating comments from the project review as appropriate.

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO2.5.5.1	d 2.5.20 tracking of occasional updates to the plan	Iterative
IO2.5.5.2	d2.5.21 2 nd edition of the plan	M12—Jan 2014

Inputs: I1 Description of work

ID (T3.1)	Description	Deadline
D2.5	I9 Communications plan	Iterative
IO2.5.5.3	I11 Occasional comments about the plan	Iterative
IO2.5.5.4	I12 Project board comments on quarterly performance	M12—Jan 2014
IO2.5.5.5	I13 Feedback from year one review	M12—Jan 2014

Outputs:

ID (T3.1)	Description	Deadline
IO2.5.5.2	O12 Revised Comms plan	M12—Jan 2014

Timescale—June 2013 to Feb 2015

Task dependencies and timing—inputs and outputs

Item	Input needed	Output Available	Depends on
i1DoW,	M1		T 1.1
i2 other communications plans,	M1		--
i3 stakeholder analysis (t2.1)	M3		T2.1
I4 comments from partners involved in (T2.1, 2.2, 2.3).	M5		T2.1, 2.2, 2.3
I5 Alignment with project management methods (T1.1),	M5		T1.1
I6 Project Quality plan (T1.5).	M5		T1.5
I7 Inputs to understand and represent WP 3, 4 and 5.	M5		Wp3,4,5
I8 Initial communications (d2.5.1-5)	M4		T2.5.1
I9 Communications Plan (D2.5)	M6		d2.5.6
I10 Partner quarterly reports	M3 ONWARDS		T1.1, d2.5.9
I11 Occasional comments about the plan	M6 ONWARDS		D2.5
I12 Project board comments on quarterly performance	M3 ONWARDS		T1.1

Item	Input needed	Output Available	Depends on
I13 Feedback from year one review	M13		T1.4
O1 contribution to communications plan D2.5,		M5	
O2 contribution to communications report D2.6,		M12	
O3 contribution to developed website D2.7		M6	
O4 Draft communications plan		M4	
O5 Comments on draft plan		M5	
O6 Finalized plan		M5	
O7 Contribution to review of all public deliverables		M5 ONWARDS	
O8 reporting template		M3	
O9 quarterly reports		M3	
O10 Annual report (year one)		M12	
O11 End of project report		M24	
O12 Revised Comms plan		M13	
d.2.5.1 early website,		M1	T 1.1
d.2.5.2 twitter account and twitter traffic,		M1	T 1.1
d.2.5.3 briefing note on project,		M2	T 1.1
d.2.5.4 press release announcing start of project,		M2	T 1.1
d.2.5.5 early blog postings		M1	T 1.1
d.2.5.6 first draft of communications plan		M4	T 2.1
D.2.5 approved communications plan		M6	T 2.1
d.2.5.7 Email to all members sharing the plan,		M6	T 1.1
d.2.5.8 Agenda item in project meeting about the plan		M6	T 1.3
d.2.5.9 reporting template		M3	T 1.1

Item	Input needed	Output Available	Depends on
d.2.5.10 quarterly report 1		M4	T 1.1
d.2.5.11 quarterly report 2		M7	T1.1
d.2.5.12 quarterly report 3		M10	T1.1
d.2.5.13 quarterly report 4		M13	T1.1
d.2.5.14 Annual report (year one)		M12	T1.4
d.2.5.15 quarterly report 5		M16	T1.1
d.2.5.16 quarterly report 6		M19	T1.1
d.2.5.17 quarterly report 7		M22	T1.1
d.2.5.18 quarterly report 8		M24	T1.1
d.2.5.19 End of project report		M24	T1.4
d.2.5.20 tracking of occasional updates to the plan		M6 ONWARDS	D2.2
d.2.5.21 2nd edition of the plan		M13	D2.2

- O1—<< Output name >>—<< Month number >>—<< Month of year >>
- I1—<< Input name >>—<< Month number >>—<< Month of year >>
- d2—<< Mini-deliverable name >>—<< Month number >>—<< Month of year >>
- MS7—<< Milestone name >>—<< Month number >>—<< Month of year >>
- D3 << Deliverable name >>—<< Month number >>—<< Month of year >>

Task risks

<< Short risk description with causes, impacts, consequences and preventive actions >>

Risk 1—Communications plan too ambitious—this will result in the project not achieving the goals which it sets itself and will thus have a reputational risk for the project. It would lead to unmanaged expectations from users and disappointment. It will be avoided by an open review of the document before adoption and routine monitoring of performance. If problems are detected, performance indicators will be altered, core activities prioritized or additional resources made available as required in consultation with the project board.

Risk 2—Communications plan lacks ambition—this will result in the plan appearing to work in terms of performance indicators but failing to reach a wide audience in practice. It is likely to result in long term loss of opportunity to the project, reducing community ownership of the project outputs and draining quality from deliverables. It will be managed by measuring 4C against other similar project and setting high but

realistic aspirations. If quarterly checks show that we routinely meet or surpass performance indicators then these should be re-set to more ambitious goals.

Risk 3—project plan not practically adopted—this will result in chaotic communications or unknown quality and sporadic involvement of the community, giving the impression that analysis has been pre-empted. It will impact the quality of deliverables and lead to unfounded assumptions about the project fixing in the minds of stakeholders. It will be avoided by ensuring that all partners are involved in drafting the plan and properly briefed about it once adopted, permitting periodic updates of the plan from partners, by embedding the communications plan in the project quality regime, and by ensuring that the plan is championed by task and work package leads. New entrants into the project will be given the communications plan as part of their project induction. Failure to adopt the plan will be monitored on an ongoing basis.

A.7 T2.6 Sustaining Communication and community knowledge exchange

Task description

This task exists to emplace the correct mechanisms to sustain and maintain continuous *external* communications throughout the duration of the project, as well as providing a suitable platform for meaningful and useful knowledge exchange between the virtual community, comprising Project Partners and stakeholders.

As a ‘Co-ordination and Support Action,’ the project communications and the community knowledge exchange must be two-way, contributing to the effectiveness of solutions by ensuring users’ needs are taken into account, and maximizing the uptake of solutions by disseminating information about them to target groups.

Communications must be transparent and accessible, giving strategic and practical shape to the ‘open and social’ ethos of the project.

The previous task ‘Communications planning and monitoring’ (T2.5), and the Project Communications Plan (D2.5) arising from this task, seek to outline each of the communications activities that will take place in order to achieve these aims. T2.6 seeks to execute that plan.

This task has one early deliverable—the establishment of an initial online presence within month 1 of the project, to be superseded by a developed Project Website by month 6 (D2.7). While this is to be followed by the production and dissemination of publicity and briefing materials at strategic points during the project (a programme for which is outline in the Project Communications Plan (D2.5)), ongoing communication through the various identified channels throughout the duration of the project is expected.

Other tasks as outlined within the Project Communications Plan which arguably fall within the scope of ‘Sustaining Communication and community knowledge exchange,’ particularly coordinating stakeholder focus groups and outreach workshops (T2.3), and conferences and events (T2.4) are addressed in the corresponding task descriptions.

Sub-task T2.6.1—Preliminary website

Description: To establish an early web presence prior to the migration to a developed website, and provide outline information pertaining to the 4C project, its aims, its partners and its structure.

Method:

This task will enable the project to commence ‘dissemination in month one’. This necessitates some initial work which is consistent with the DoW but which pre-figures the full communications plan or stakeholder analysis.

Project Partners will be consulted to identify the key information to be presented through the website and functionality required. This information will form a basic specification which will be used to evaluate the available and most suitable solutions for the website.

WordPress has been selected as the most suitable interim solution.

Once identified, DPC created a website structure according to the specification, drawing key information from the DoW and Briefing Document to populate the main pages, and using the 4C logo to create brand identity. Links to Project partner websites have been used to provide further information on each contributing party.

Mini Deliverables:

ID (T3.1)	Description	Deadline
IO2.6.1.1	d2.6.1 Preliminary Website	M01—Feb 2013

Inputs: DoW, 4C Project Briefing Document and:

ID (T3.1)	Description	Deadline
IO2.6.1.2	I1—Research website solutions	M01—Feb 2013
IO2.6.1.3	I2—Supply of 4C partner links	M01—Feb 2013
IO2.6.1.4	I3—Supply of 4C Project logo	M01—Feb 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.1.5	O1—Project Partner review of website content	M01—Feb 2013
IO2.6.1.6	O2—Creation of website	M01—Feb 2013
IO2.6.1.7	O3—contribution to developed website D2.7	M01—Feb 2013

Timescale: *Completed in month 1*

Sub-task T2.6.2 –Social Media

Description: To publicize and maintain a complete account of 4C Project activities using social media, and monitor interest in the project through the use online analytics.

Method:

Stakeholder analysis has presented a diverse audience, including those outside the digital preservation research community. In order to reach these audiences, and maintain an enduring web presence and awareness of the project, the 4C Project has assessed the available social media channels. The project will use the 4C website and blogs, plus Twitter feed and a #4ceu hashtag to publicise activities, encouraging debate and participation, as these are channels which are accessible by all communities.

Project activities will be cross marketed through established community social media outlets such as the DPC's hashtags and twitter TIMBUS, SPRUCE, APARSEN and others as well as through the through the judicious use of retweets and FF recommendations with LinkedIn Groups of related projects, e.g. APARSEN.

A specific 4C LinkedIn Group will not be established in order to maintain the ethos of an ‘open and social’ project.

DPC has set up a Twitter account in the name 4C_Project. An owner from within DPC has been appointed to monitor the activity on the account through Tweetdeck and aims to make tweets on a daily basis, or as near as possible.

Tweets publicize and use the #4ceu hashtag to enable monitoring of conversation on the subject and communicate progress on various 4C Project activities, the addition of new blogs to the website, any meetings, up-coming or on-going events or conferences, as well as any other information relevant to the managing cost of digital curation.

A summary of communications made and received through the Twitter feed, as well as numbers of followers will be reported in the quarterly and annual Communications Activities Reports (D2.6)

Mini Deliverables:

ID (T3.1)	Description	Deadline
IO2.6.2.1	d2.6.2a Twitter account	M01—Feb 2013
IO2.6.2.2	d2.5.2b hashtag	M01—Feb 2013

Inputs: DoW, 4C Briefing Document, and:

ID (T3.1)	Description	Deadline
IO2.6.2.3	I4—D2.6 4C Project Communications Plan	Iterative
IO2.6.2.4	I5—progress or activity updates from Project Partners	Iterative

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.2.5	O4—contribution to Report on Communications Activities D2.6	Iterative

Timescale: *Completed in month 1*

Sub-task T2.6.3—Blogs

Description: To stimulate and maintain a discussion and information sharing on the subjects addressed by the 4C Project, enabling the identification of ‘hot topics.’ The core function of the blog will be alert the community to 4C activities and to encourage their participation. For example the blog will be used to ‘leak’ draft reports and conclusions to invite comments and enable a form of peer validation not possible with traditional closed projects.

Method:

Early blog post contributors are identified in the first draft of the Project Communications Plan. In order to maintain a continuous stream of posts, the schedule will be completed according to the sequence of Work Package contributions identified throughout the year. The subject of blog posts may reflect impending or recent events, or milestones reached in the project programme. The preliminary WordPress site does not incorporate a blogging platform. Posts made to this site are undertaken by DPC, who will contact the nominated author for their contribution in advance of their scheduled ‘publish date.’ Once received, this is proof read and uploaded. A subsequent tweet publicizes the blog and stimulates readership within followers.

Once established and operating, the developed website will incorporate a blogging platform which will enable uploads of blogs by individual authors. All posts are to be peer reviewed, and/or reviewed by the WP2 Lead prior to upload.

Mini Deliverables:

ID (T3.1)	Description	Deadline
IO2.6.3.1	d2.6.3a schedule of blog posts	M03—April 2013
IO2.6.3.2	d2.6.3b blog posts	Iterative

Inputs:

ID (T3.1)	Description	Deadline
IO2.6.2.3	I4—D2.6 4C Project Communications Plan	Iterative
IO2.6.3.3	I6—Completion of blog schedule,	M03—April 2013
IO2.6.3.4	I7—Blog posts from authors	Iterative

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.2.3	O3—contribution to Project Communications Plan D2.5	Iterative
IO2.6.2.5	O4—contribution to Report on Communications Activities D2.6	Iterative
IO2.6.3.5	O5—contribution to validation of all other project outputs and reports (especially tasks in WP 3, 4 and 5)	Iterative

Timescale: *Ongoing throughout project duration, commencing in month 1*

Sub-task T2.6.4—Publicity and Briefing Materials

Description: In consultation with other project partners, publicity and briefing materials will be produced at strategic points during the project.

Method: As part of the development of the Project Communications Plan and Stakeholder Registry, the 4C Project team have identified a number conferences which may be used as platforms for engaging with the various stakeholder groups. Furthermore, a number of existing Project Partner events may also be used for the same purpose.

In order to support this engagement, various publicity and briefing materials may be produced. The format, delivery and timing of the materials is still to be confirmed.

Once determined, authors for the various articles and publicity material copy will be appointed from within the Project team. Designers will be engaged as required to produce artwork in line with the branding guidelines, for the publicity material.

All articles and copy will be subject to a peer review and approval process prior to submission.

Mini Deliverables:

ID (T3.1)	Description	Deadline
IO2.6.4.1	d2.6.7a journal articles/briefing papers/conference papers	Iterative
IO2.6.4.2	d2.6.7b project poster	Iterative
IO2.6.4.3	d2.6.7c project flyer/leaflets	Iterative
IO2.6.4.4	d2.6.7d pop-up banner/stand dressing	Iterative

Inputs:

ID (T3.1)	Description	Deadline
IO2.6.2.3	I4—D2.6 4C Project Communications Plan	Iterative
D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives	I8—T2.2 Stakeholder Registry	M06—July 2013
IO2.6.4.5	I9—authorship of articles and copy	Iterative
IO2.6.4.6	I10—design input, printing/production and delivery	Iterative
IO2.6.4.7	I11—authorship of press releases	Iterative
IO2.6.4.8	I12—contact/submission to journal press offices	Iterative

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.2.5	O6—contribution to Report on Communications Activities D2.6	Iterative
IO2.6.4.9	O7—Identification of subjects of articles	Iterative
IO2.6.4.10	O8—identification of materials required	Iterative
IO2.6.4.11	O9—Project Team approval	Iterative

Timescale: *TBC*

Task 2.6.5—Developed Website

Description: To provide a sustainable, substantial and well-developed project website for the 4C Project.

Method:

The developed website must support the sustainable delivery of the Project Communications Plan, and functionality must be aligned with deliverables or objectives outlined therein. Drawing from the aims of the project Communication Plan, the Project Partners have been consulted at the face to face kick-off meeting to agree and further functionality requirements.

This information will form a basic specification which will be used to evaluate the available and most suitable solutions for the website. This process has identified Joomla as the most suitable solution for the developed website.

Having established a basic specification, comparison with other EU Project website functionality and Joomla capability has been undertaken to develop a full specification, identifying the following feature/component requirements:

- blogging platform allowing multiple authors to write their own blog posts after logging in
- comment function for blog posts and other pages subject to editorial / moderation
- user management functions to gather personal details and provide access to private areas
- search function, searching within PDF and DOC files as well as HTML
- RSS out news section
- displays 4C twitter and encourages users to follow
- upload of images, files and documents
- allows embedding remote media, eg FLICKR/ VIMEO
- basic wiki functions for registered users
- repository to hold and publish major deliverables
- auto-generated website map
- auto-generated 'most popular' list
- able to be analysed via Google Analytics or equivalents
- backend administrator privileges for content and user management
- tools to import remote content into the content management system (CMS)

- transferable to existing .4cproject.eu domain
- search engine optimisation
- simple forms to gather information from polls / surveys / questionnaires
- captcha function to inhibit spam input to comments / forms etc

Once the detailed specification is approved by Project Partners, DPC will instruct web designers to create the structure and CMS set up for the developed website.

A DPC owner will be appointed to migrate all information from the existing website to the developed website, populating any new sections from the DoW, Briefing document, and Project Partner input.

Once all information has been migrated to the developed website, the DPC owner will continue to operate the site, managing, adding and updating information as required in order to maintain a current record of the Project and its progress.

Deliverables:

ID (T3.1)	Description	Deadline
D2.7	D2.7 Developed Project Website	M06—July 2013

Inputs:

ID (T3.1)	Description	Deadline
IO2.6.2.3	I4—D2.6 4C Project Communications Plan	M06—July 2013
IO2.6.5.1	I13—Web designer site creation	M06—July 2013
IO2.6.5.2	I14—information migration	M06—July 2013
IO2.6.5.3	I15—management and operation	M06—July 2013

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.2.5	O10—contribution to Report on Communications Activities D2.6	M06—July 2013
IO2.6.5.4	O11—Website specification development	M06—July 2013
IO2.6.5.5	O12—project partner approval	M06—July 2013
IO2.6.5.6	O13—contribution to validation of all other project deliverables	Iterative

Timescale: *To be completed in month 6*

Sub-task T2.6.6—Curation Costs Exchange

Description: A functional framework and platform for the exchange of curation costs-related information.

Method:

A virtual community platform for the Curation Costs Exchange (CCEX), a functional framework for the exchange of curation costs-related information, will also be established. The CCEX may be sited on the 4C project Website, or to provide more sustainable access post project completion, this may be located on the DPC website.

Close consultation and coordination with WP3 (Assessment) will be undertaken to establish the operation, objectives, platform, location and online environment for gathering and disseminating information about the economic determinants of digital curation. Consultation with stakeholders through focus groups and outreach events will also help to understand their needs in order to meet them.

Great care should be taken throughout the project to ensure that expectations of the CCEX are properly managed, especially before the specification is finalised and agreed by the project. As a general principle the project should seek to 'under-promise and over-deliver'.

Outcomes of the consultation will be used to develop and outline specification for the CCEX for Project team approval.

Once gained, further consultation will take place with the 4C Project and DPC. It is likely that this will be hosted on the DPC existing infrastructure and therefore negotiations will involve Cyber Media to develop a working CCEX and implement this on the agreed website.

The availability of, and details for accessing the CCEX will be publicized through the various channels identified in the Project Communications Plan, to encourage participation and discussion.

Deliverables:

ID (T3.1)	Description	Deadline
D2.8	D2.8 Curation Costs Exchange (CCEX)	M24—January 2015

Inputs: DoW and:

ID (T3.1)	Description	Deadline
D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives	I8—T2.2 Stakeholder Registry	M06—July 2013
IO2.6.6.1	I16—Wider Consultation with WP3	M24—January 2015
D3.1	I17—D3.1 Evaluation of Cost Models and Needs and Gap Analysis	M24—January 2015
D3.2	I18—D3.2 A Cost Concept Model & Gateway Requirement Specification	M24—January 2015
D3.3	I19—D3.3 Curation Costs Exchange Framework	M24—January 2015
IO2.6.6.2	I20 -Consultation with stakeholders	?
IO2.6.6.3	I21—web design team to develop exchange	?
IO2.6.6.4	I22—implementation and testing of exchange	?
IO2.6.6.5	I23—advertising of exchange	?
IO2.6.6.6	I24—management/download from exchange	?

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.2.5	O14—contribution to Report on Communications Activities D2.6	M12—January 2014
IO2.6.6.7	O15—CCEX specification development	?
IO2.6.6.8	O16—Implemented CCEX platform	M24—January 2015

Timescale: *To be completed in month 24*

D2.6—Report on Communications Activities

Description: A review of communications activities over the first 12 month period and a tactical look forward.

Method: Following the end of every quarter, DPC will collate a report of communications activities as outlined in the Project Communications Plan (D2.5), drawing from individual project partner summaries of activity.

The report will measure activities and outputs against the stated objectives and measures for the project. The quarterly report will ultimately be used to feed into the annual Report on Communications Activities (D2.6).

Deliverables:

ID (T3.1)	Description	Deadline
D2.6	D2.6 Report on Communications Activities	M12—Jan 2014

Inputs:

ID (T3.1)	Description	Deadline
IO2.6.7.1	I24—Project partner summaries of activity	M12—Jan 2014
IO2.6.7.2	I25—web and usage stats	M12—Jan 2014

Outputs:

ID (T3.1)	Description	Deadline
IO2.6.7.3	O12—Quarterly Report on Communications Activities	Iterative

Timescale: Completed in months 12 and 24

Task dependencies and timing—inputs and outputs

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
		Resources	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
I1	Research website solutions,		X											
I2	Supply of 4C		X											

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
		Resources	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
	partner links													
I3	Supply of 4C Project logo.		X											
O1	Project Partner review of website content		X											
O2	Creation of website		X											
O3	contribution to developed website D2.7		X											
I4	D2.6 4C Project Communications Plan							X						
I5	progress or activity updates from Project Partners				X									
O4	contribution to Report on Communications Activities D2.6,													X
O5	Validation and contribution		x	x	x	x	x	x	x	x	x	x	x	X

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
		Resources	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
	to all public deliverables													
I4	D2.6 4C Project Communications Plan							X						
I6	Completion of blog schedule,							X						
I7	Blog posts from authors		X	X	X	X	X	X	X	X	X	X	X	X
O3	contribution to Project Communications Plan D2.5,							X						
O4	contribution to Report on Communications Activities D2.6,													X
O5	Contribution to validation of all other deliverables		x	x	x	x	x	x	x	x	x	x	x	x
I4	D2.6 4C Project Communications Plan,							X						
I8	T2.2 Stakeholder													X

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
		Resources	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
	Registry,													
I9	<i>authorship of articles and copy,</i>													
I10	<i>design input, printing/production and delivery,</i>													
I11	<i>authorship of press releases,</i>													
I12	<i>Contact/submission to journal press offices.</i>													
O4	contribution to Report on Communications Activities D2.6,													X
O5	<i>Identification of subjects of articles,</i>													
O6	<i>identification of materials required,</i>													
O7	<i>Project Team approval,</i>													
I4	D2.6 4C						X							

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
			M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
	Project Communicati ons Plan,													
I13	Web designer site creation,						X							
I14	information migration,						X							
I15	Management and operation.							X	X	X	X	X	X	X
O4	contribution to Report on Communicati ons Activities D2.6,													X
O11	Website specification development,					X								
O12	project partner approval,					X								
O13	Contribution to validation of all other deliverables					X	x	x	x	x	x	x	x	X
I8	T2.2 Stakeholder Registry,													X
I16	<i>Wider</i>													

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
			M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
	<i>Consultation with WP3,</i>													
I17	<i>D3.1 Evaluation of Cost Models and Needs and Gap Analysis</i>										X			
I18	<i>D3.2 A Cost Concept Model & Gateway Requirement Specification</i>										X			
I19	<i>D3.3 Curation Costs Exchange Framework</i>													X
I29	<i>Consultation with stakeholders</i>													
I21	<i>web design team to develop exchange,</i>													
I22	<i>implementation and testing of exchange,</i>													
I23	<i>advertising of exchange,</i>													

No.	Task	2013	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
		Resources	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
I24	<i>management /download from exchange</i>													
O4	contribution to Report on Communications Activities D2.6,													
O10	<i>CCEx specification development,</i>													
O11	<i>Implemented CCEx platform.</i>													
I24	Project partner summaries of activity				X			X			X			X
O12	Quarterly Report on Communications Activities				X			X			X			X

- O1—<< Output name >>—<< Month number >>—<< Month of year >>
- I1—<< Input name >>—<< Month number >>—<< Month of year >>
- d2—<< Mini-deliverable name >>—<< Month number >>—<< Month of year >>
- MS7—<< Milestone name >>—<< Month number >>—<< Month of year >>
- D3 << Deliverable name >>—<< Month number >>—<< Month of year >>

Task risks

Risk 1—Little uptake of communications activities, impact is limited reach across target audiences and minimal stakeholder engagement. This will be closely monitored using online analytics, and the Project Communications Plan adjusted accordingly, if required.

Risk 2—Incomplete or late completion of Stakeholder Registry, impact is inability to plan a large part of the communications activities. Continuous progress reports and project partner input to ensure full completion.

Risk 3—Inability to develop satisfactory Curation Costs Exchange (CCEX), impact is inability to develop useable resource support in line with project aims.

Risk 4—information necessary to specify the CCEX arrives too late to be useful, D3.1, 3.2 and 3.3

Risk 5—user expectations for CCEX run ahead of practical capacity of the project

A.8 T3.1 Information Dependency Profile

Task description

This Task (T3.1—Information Dependency Profile) ensures that there is a common understanding of all aspects and concepts of the project and that the information flows seamlessly between the Tasks. It identifies dependencies, timing, inputs and outputs between all Tasks, and visualizes them to the extent possible. This way it makes sure that the (mini)deliverables of the project are in sync with each other.

This is done by continuously receiving detailed information about the needs of each Task in the project from the Task leaders.

This Task has an early Milestone (MS7—Final Information Dependency Profile (IDP)) in M6 (July 2013).

The envisioned objectives of T3.1 are:

T3.1.1—Establish a common understanding of the project

Description: T3.1 makes sure that project members understand each other’s needs and objectives. It affirms and communicates common concepts (terminology, formats) and facilitates the understanding of each Task and Work Package.

Method: Reception of information from each Task (e.g. stakeholder information) and syncing the descriptions received via the mini-deliverables which each Task delivers before March 15: (cf. I1 (Input 1)—Input from Task leaders to the Information Dependency Profile (IDP) in the Gantt-chart from T3.1).

Mini-Deliverables:

Inputs:

ID (T3.1)	Description	Deadline
IO3.1.1.1	I1—Input from Task leaders to the Information Dependency Profile (IDP).	M02—March 13

Outputs:

ID (T3.1)	Description	Deadline
IO3.1.1.2	O1—Distribution of template for Task-leaders.	M01—Feb 13

T3.1.2—Identify the dependencies between Tasks

Description: T3.1 identifies and illustrates all the dependencies and timings of each task (deliverables, mini-deliverables). It also identifies the inputs that each task requires. It communicates these to the other relevant tasks—e.g. task X needs Y from task Z (inputs, outputs).

Method: Reception of I1—Input from Task leaders to the Information Dependency Profile (IDP) and creation a master document that holds all the dependencies.

Mini-Deliverables:Inputs:

ID (T3.1)	Description	Deadline
IO3.1.1.1	I1—Input from Task leaders to the Information Dependency Profile (IDP).	M02—March 13

Outputs:

ID (T3.1)	Description	Deadline
IO3.1.2.1	Master document that holds all the dependencies.	M03—April 13
IO3.1.2.2	d2—Draft of the Information Dependency Profile (IDP) for audit.	M04—May 13

T3.1.3—Map and enable the information flow between Tasks

Description: T3.1 ensures that all the information that the different Tasks require is available in an appropriate format. It will also to a reasonable extent operate as communication link between Tasks.

Method: Reception of I1—Input from Task leaders to the Information Dependency Profile (IDP) and creation of an overview of everyone’s inputs. Development of required formats for the exchange of information and dissemination of adopted concepts, formats, terminologies, etc.

Mini-Deliverables:Inputs:

The final profile is yet to be defined. It consists of an excel sheet (Needed Inputs) and a PERT chart. Is anything else needed?

ID (T3.1)	Description	Deadline
IO3.1.3.3	I2—Comments on d2—Draft of the Information Dependency Profile (IDP) for audit.	M05—June 13

Outputs:

ID (T3.1)	Description	Deadline
MS7	MS7—Final Information Dependency Profile (IDP).	M05—June 13

T3.1 will also provide other mini-deliverables yet to be defined pertaining to the exchange of information and dissemination of adopted concepts, formats, terminologies, etc., all throughout the project.

T3.1.4—Secure the correct timing between tasks

Description: T3.1 makes sure that the timing of (mini)-deliverables and activities are right.

Method: Analysis of the inputs from each task. Intervention in Tasks when needed.

Mini-Deliverables:

Inputs: -

Outputs: -

Task dependencies and timing—inputs and outputs

		2013	Feb	Mar	Apr	May	Jun
No	Task	Resources	M01	M02	M03	M04	M05
3.1	Information Dependencies Within the Project	9	IO3.1.1.2	IO3.1.1.1	IO3.1.2.1	IO3.1.2.2	IO3.1.3.3 / MS7

1. IO3.1.1.2—Distribution of template for Task-leaders—M01 (February 13)
2. IO3.1.1.1—Input from Task leaders to the IDP—M02 (March 13)
3. IO3.1.2.1—Master document that holds all the dependencies M03 (April 13)
4. IO3.1.2.2—d2—Draft of the Information Dependency Profile (IDP) for audit—M04—(May 13)
5. IO3.1.3.3—I2—Comments on d2—Draft of the Information Dependency Profile (IDP) for audit—M05 (June 13)
6. MS7—Final Information Dependency Profile (IDP)—M05 (July 13)

Task risks

- R1—T3.1 doesn't receive the needed inputs from other tasks that are meant to enable T3.1 to make information flow seamlessly throughout the project. Mitigation: Continuous contact and follow-up on to-do's, namely via the IDP.

A.9 T3.2 Evaluate Existing cost Models and produce a needs and gap analysis report

Summary of T3.2

Task ID: T3.2 “Evaluate existing cost models and produce a needs and gap analysis report”

Task period: Month 1—12

Total effort: 16 man-month (mm); 64 man-weeks (mw)

Task leader and effort: KBDK 6 mm

Task participants and efforts: DNA 3,5 mm; HATII-DCC 2,5 mm; SBA 1,5 mm; UEDIN-DCC 1 mm; KNAW-DANS 0,5 mm; NLE 1 mm

Milestones: MS 12 (Month 9) “Draft Cost Models Study/Needs & Gap Analysis” (Draft report)

Deliverables: D 3.1 (Month 12) “Evaluation of Cost Models & Needs & Gap Analysis” (Final report)

Terms and definitions (working)

Cost model:

A representation that describe how resources for digital curation activities relate to costs; cost models may include parameters that convert the resources into cost data.

Economic model:

A representation that describes how the economic processes around digital curation work; including the demand and supply side, and the flow of costs and revenues. Economic models enable analysis of the relationship between costs and benefits (value). Thus, cost models may be embedded in economic models.

Financial information:

All types of information necessary for financial management (budgeting, accounting and charging). It includes factual data on the cost (e.g. labour, materials and overhead), additional information describing what is being costed (e.g. assumptions and specifications), as well as information that relates to the benefits and value that the digital curation activities accrue and how these incentives influence economic behaviour and performance.

Stakeholder:

On the one side the roles of managers and administrators of digital repositories and other suppliers of preservation services; and on the other the roles of owners, producers and consumers of digital assets that have a demand for these services and a willingness to pay for the value that these services represent to them.

Description and scope of T3.2

The main objective of T3.2 is to analyse existing research related to the economics of digital curation and investigate how well current economic models, including cost models, meet stakeholders’ needs for financial information. Based on this analysis the task will identify best practices, and describe gaps between

stakeholders’ needs and the capability of the models. T3.2 will produce a report with the working title “Evaluation of Cost Models & Needs & Gap Analysis”. The full description of T3.2 from the DoW is inserted in Appendix 1. The T3.2 will as far as possible build on the extensive work done by the APARSEN project (WP32), but where the latter focuses on evaluating cost models against the ISO 16363 standard on trusted digital repositories, the present work will evaluate the models against stakeholders’ needs.

Breakdown of T3.2 in sub tasks and sub deliverables

Sub task 3.2.1: Identify Economic Models

Description

This sub task will list existing economic models relevant to the field of digital curation and provide a summary of the models.

Method

WP2 will provide a registry of publications and projects within the field of the economies of digital curation that will be used as a basis for the identification of models. Other inputs include the lists of cost models created by the APARSEN¹⁹ and the CMDP project²⁰. The summary of the models will be structured, e.g. under the headings: ID, Name; Creators; References; and Summary of Model (purpose, scope, etc.).

The summary will be reviewed by TG 3.2 and distributed for comments within WP3.

Dependencies

ID (T3.1)	Description	Deadline
IO2.1.1.2	WP2 T2.1 “Baseline study of stakeholders and stakeholder initiatives” shall provide a registry of publications and projects within the field of the economies of digital curation (deadline Month 3).	M03—April 13
IO3.2.1.1	Meeting with APARSEN WP32 and 4C Coordinator to obtain detailed information from the APARSEN project and ensure future cooperation and exchange of information between the two projects.	M03—April 13

¹⁹ APARSEN D32.1 Report on Cost Parameters for Digital Repositories, February 2013, Annex 1, p. 41-44

²⁰ The gross list of cost models from the CMDP project is inserted in Appendix 2

Deliverables Month 4

ID (T3.1)	Description	Deadline
IO3.2.1.2	D3.2.1.1 List and summary of economic models that will be evaluated.	M06—July 13
IO3.2.1.3	D3.2.1.2 Draft description of existing models for the Final Report’s section “Economic Models” ²¹ .	M06—July 13

Sub task 3.2.2: Develop Evaluation MethodDescription

This sub task will analyse stakeholders’ needs for financial information and use the outcome to inform the development of a method for evaluating to what extent current models meet stakeholders’ needs.

Method

This task will initially formulate a set of questions that WP2 T2.1 will then apply in their consultation with stakeholders to reveal stakeholders’ needs for financial information. As a starting point we should use the survey questions aimed at evaluating the LIFE model for UK HEI repositories and the resulting report²². Likewise, the questions that the APARSEN project has developed for analysing cost models²³ as well as the questions they have used to survey stakeholders’ reasons for using cost models and their requirements for cost models²⁴ should be taken as a starting point. Furthermore, the CMDP project has generated a list of repository administrators’ needs for cost information that may be of use²⁵.

The needs of the stakeholders in the APARSEN report are expressed in a rather abstract form, e.g. “To inform decision makers” or “To find out the costs of preserving objects/items”. Thus, it is envisioned that stakeholders’ needs must in some way be transformed into more concrete and operational requirements that will bring out the underlying assumptions and preconditions of the needs. If, for example, we take the above cited need on assessing the cost of preserving objects, this need will require that the model covers the necessary preservation activities; is able to handle the requested type of objects and the envisioned preservation strategy; includes some means of estimating future costs; and this is just to mention a few implications of this need.

Once WP2 has provided the results of the stakeholder consultation the revealed needs will be analysed and used to develop the evaluation method. It is envisioned that the evaluation method will be based on some kind of schema, checklist or questionnaire that will express the evaluation criteria and allow the models to be evaluated in a systematic way.

²¹ The outline of the Final Report is inserted in Appendix 3

²² See Appendix 4 and the report (http://www.dcc.ac.uk/sites/default/files/documents/life_pilot_final_2012.pdf)

²³ See Appendix 5 and APARSEN D32.1 Report on Cost Parameters for Digital Repositories, February 2013, p. 45

²⁴ APARSEN D32.1 Report on Cost Parameters for Digital Repositories, February 2013, p. 33-34

²⁵ See Appendix 6 for a list of requirements generated by the CMDP project.

In order to structure the evaluation schema different “characteristics” of models should be identified by analysing existing models. Possible generic characteristics of models include:

- **Organisational context**; specifies the nature of the repository (type, size, mission, stakeholders, ...) and the data (type, properties, ...) that the model can handle.
- **Activities**; specifies which activities are covered by the model and how detailed the activities are described; the OAI Reference Model is often used in models as a framework for describing activities.
- **Cost drivers**; specifies how the model accounts for cost drives, i.e. the quantity of data and the preservation quality
- **Accounting principles**; specifies which accounting principles the model is based on and how it handles financial adjustments etc.
- **Impact of benefits**, specifies how the model handles the perceived benefits/value of digital curation and stakeholders’ willingness to pay
- **Usability and user friendliness**; for example it specifies how well the model is documented, how complex it is to use, and how is the User Interface performs

In the development of the evaluation method the task will take the work on economic determinants conducted by WP4 into account. The method will be developed iteratively by testing its applicability against selected models. The evaluation method will exploit decision-making techniques developed as part of previous EC projects (PLANETS/TIMBUS).

The task will also provide a plan and a procedure for the evaluation that identifies who will evaluate the models (one or more partners?) and when; and who will review the results of the evaluation (one or more partners?) and when.

A draft description of stakeholders needs and the evaluation method will be reviewed by the TG and distributed for comments within WP3.

Dependencies

The usability of the outcome of the WP2 consultation with stakeholders depends on the way the questions are formulated and it is therefore important that they are well conceived.

ID (T3.1)	Description	Deadline
D2.1	WP2 T2.1 “Baseline study of stakeholders and stakeholder initiatives” shall provide preliminary input on stakeholders’ needs for financial information (deadline Month 4).	M04—May 13
D4.1	WP4 T4.1 “A prioritised assessment of the indirect economic determinants of digital curation” shall provide a preliminary list of indirect economic determinants (deadline Month 4).	M04—May 13

The work to identify generic characteristics in cost models should ideally be coordinated with T3.3 “Develop a cost concept model and gateway requirement specification”, but there are currently no resources set aside for this within WP3.

Deliverables Month 5 (D3.2.2.1 Month 3)

ID (T3.1)	Description	Deadline
IO2.1.3.2	D3.2.2.1 Set of questions that WP2 T2.1 will use in their consultation with stakeholders (Month 3)	M03—April 13
IO3.2.2.1	D3.2.2.2 Evaluation tools and schema outline	M05—June 13
IO3.2.2.2	D3.2.2.3 Evaluation plan and procedure	M05—June 13
IO3.2.2.3	D3.2.2.4 Draft description of stakeholders’ needs for the Final Report’s section “Stakeholders’ Needs”	M05—June 13
IO3.2.2.4	D3.2.2.5 Draft description of the evaluation method for the Final Report’s section “Evaluation Method”.	M05—June 13

Sub task 3.2.3: Evaluation and Gap AnalysisDescription

This sub task will evaluate existing models to identify gaps between stakeholders’ needs for financial information and the capabilities of current models and provide a summary of the results.

Method

The selected models will be evaluated by the method developed in sub task 3.2.2. Depending on the outcome of sub task 3.2.1 it is envisioned that around 15 models will be evaluated. The results of the evaluations will then be analysed to identify and describe gaps between the needs of the different groups of stakeholders and the capabilities of the models, as well as best practice in modelling.

The task will provide an overview and summary of the findings, which will be reviewed by the TG and distributed for comments within WP3.

Dependencies

ID (T3.1)	Description	Deadline
IO3.2.1.2	List of models from sub task 3.2.1	M06—July 13
IO3.2.2.3	list of stakeholders’ needs	M05—June 13
IO3.2.2.2	evaluation schema/procedure from sub task 3.2.2	M05—June 13

Deliverables Month 7

ID (T3.1)	Description	Deadline
IO3.2.3.1	D3.2.3.1 Individual result reports for all the evaluated models	M07—Aug 13
IO3.2.3.2	D3.2.3.2 Draft description of the results for the Final Reports' section "Gap Analysis".	M07—Aug 13

Sub task 3.2.4: Draft ReportDescription

This sub task will provide a draft report on the outcome of T3.2 (MS12) for review by all members of 4C.

Method

The report will include the standard chapters: Introduction, Materials (sub task 3.2.1) and Methods (sub task 3.2.2), Results (sub tasks 3.2.3), Discussion, Conclusion, References, and Appendices. Furthermore, they will serve as basis for writing the Introduction, Discussion and Conclusion chapters. All chapters and sections will be delivered to a report editor who will merge them into the draft report, while ensuring that the terminology, language and flow in the sections is consistent.

The draft report will be reviewed by WP3 and distributed for comments to all 4C partners, and feedback will be integrated in the report before submission (MS12).

Dependencies

Provision of required content and feedback from reviewers.

Deliverables Month 8

ID (T3.1)	Description	Deadline
IO3.2.4.1	D3.2.4.1 T3.2 Draft Report for review by TG3.2 and identified stakeholders in WP3. Comments from 4C.	M04—May 13
MS12	<u>4C Milestone (MS12) Month 9</u> MS12 T3.2 Draft Report including review comments, which will feed directly into T3.2 Final Report.	M09—Oct 13

Sub task 3.2.5: Final ReportDescription

This sub task will provide a Final Report on T3.2 (D3.1).

Method

The draft report will be disseminated to identified stakeholders within 4C for review, and feedback from the review will be integrated in the report before submission. The review is also intended to ensure consistency with WP2 and WP4.

Dependencies

Provision of comments from reviewers.

Deliverables Month 11

ID (T3.1)	Description	Deadline
IO3.2.5.1	D3.2.5.1 T3.2 Final Report for review by TG 3.2 and identified stakeholders in WP3 and 4C as well as comments welcomed from all members of 4C.	M11—Dec 13
D3.1	<u>4C Deliverable (D3.1) Month 12</u> D3.1 T3.2 Final report, which will provide input for WP5 T5.3 “Roadmap report that outlines strategies for the provision of cost-effective digital Curation”.	M12—Jan 14

List of T3.2 deliverables

ID	Description	Deadline
D3.2.2.1	Questions for WP2	April (M3)
D3.2.1.1	List and summary of models	May (M4)
D3.2.1.2	Draft “Existing economic Models” for the Draft/Final Report	May (M4)
D3.2.2.2	Evaluation tools and schema outline	June (M5)
D3.2.2.3	Evaluation plan and procedure	June (M5)
D3.2.2.4	Draft on “Stakeholders’ needs” for the Draft/Final Report	June (M5)
D3.2.2.5	Draft on “Evaluation Method” for the Draft/Final Report	June (M5)
D3.2.3.1	Result reports for individual model evaluations	Aug (M7)
D3.2.3.2	Draft on “Gap Analysis” for the Draft/Final Report	Aug (M7)
D3.2.4.1	Draft Report for review	Sep (M8)
4C MS12	Draft Report	Oct (M9)
D3.2.5.1	Final Report for review	Dec (M10)

4C D3.1 Final Report

Jan (M12)

Gantt chart for T3.2

T3.2		Partners								13												14
ST ID	Name	mw	KB-DK	DNA	HATI	SBA	UEDIN	NLE	KNAW	feb	mar	apr	maj	jun	jul	aug	sep	okt	nov	dec	jan	
3.2.1	Identify Economic Models	4	2	2	0	0	0	0	0													
3.2.2	Develop Evaluation Method	22	6	6	2	4	2	2	0			(SD)		SD								
3.2.3	Evaluation and Gap Analysis	14	8	4	2	0	0	0	0							SD						
3.2.4	Draft Report	17,5	6	1,5	4	1,5	1,5	1,5	1,5								SD		MS12			
3.2.5	Final Report	6,5	2	0,5	2	0,5	0,5	0,5	0,5												SD	D3.1

Legend: mw: man-weeks; D: 4C deliverable; MS: 4C milestone; SD: T3.2 sub task deliverable.

Appendix 1: Description of T3.2 from DoW:

The main objective of WP3:

- Establish the most effective current methods to estimate and compare the cost of digital curation
- Identify the most beneficial paths for future development of solutions and services.

The main objective of WP3 T3.2:

- Assess and describe the work that has already been done in the area of curation cost modelling (to understand whether the current needs and requirements of stakeholders can be met with existing solutions and services)

Detailed description of WP3 T3.2:

The aim of this task is to analyse existing research on the economies of digital preservation and curation in order to leverage knowledge and identify strengths and weaknesses of current cost models. With intelligence emerging from WP2, where the intention is to engage with a broad array of stakeholders from the public and private sector via interviews and focus groups, the analysis will identify useful components of current cost models and provide best practice in costing with a view to the different users. This part of the analysis will feed into defining a conceptual cost model (T3.3) and into developing a submission template and Curation Cost Exchange framework (T3.4). The analysis will also identify where the current provision of tools neither matches nor meets what is required by the stakeholder community. The sophistication and granularity of this analysis will be enhanced by additional input from WP4. The outcome of the task will be a needs assessment and gap analysis report. This report will also be a critical input for the road mapping activities in WP5.

Appendix 2. Gross list of economic models developed by the CMDP project.

ID	Name	Creators	References
1	Cost model for digital preservation	National Archives of the Netherlands	Slats, J. and Verdegem, R, "Cost Model for Digital Preservation", Proceedings of the IVth triennial conference, DLM Forum, Archive, Records and Information Management in Europe, 2005 http://dmlforum.typepad.com/Paper_RemcoVerdegem_and_JS_CostModelfordigitalpreservation.pdf
2	NASA Cost Estimation Tool (CET)	National Aeronautics and Space Administration (NASA)	NASA, "Cost Estimation Toolkit (CET)," http://opensource.gsfc.nasa.gov/projects/CET/index.php
3	LIFE Costing Model	University College London (UCL) & The British Library (BL) & Humanities Advanced Technology and Information Institute (HATII) at the University of Glasgow	Hole, B., Lin, L., McCann, P., Wheatley, P., "LIFE3: A Predictive Costing Tool for Digital Collections", In: Proceedings of iPRES 2010, 7th International Conference on Preservation of Digital Objects, Austria, 2010, http://ifs.tuwien.ac.at/dp/ipres2010/papers/hole-64.pdf Ayris, P, Davies, R., McLeod, R., Miao, R., Shenton, H., Wheatley, P. The LIFE2 final project report, 2008 http://eprints.ucl.ac.uk/11758/ McLeod, R., Wheatley, P., Ayris, P. Lifecycle information for e-literature: full report from the LIFE project, 2006 http://eprints.ucl.ac.uk/1854/
4	Keeping Research Data Safe (KRDS) model	Charles Beagrie Limited	Beagrie, N., Lavoie, B., Woollard, M., Keeping Research Data Safe 2, Final Report, Charles Beagrie Limited, 2010, www.jisc.ac.uk/media/documents/publications/reports/2010/keepingresearchdatasafe2.pdf
5	Cost Model for Digital Archiving	Data Archiving and Networked Services (DANS)	Palaiologk, A.S., Economides, A.A., Tjalsma, H.D., Sesink, L.B., "An activity-based costing model for long-term preservation and dissemination of digital research data: the case of DANS", Int J Digit Libr, DOI 10.1007/s00799-012-0092-1, Springer, 2012, http://rd.springer.com/article/10.1007/s00799-012-0092-1
6	Cost Model for Digital Preservation (CMDP)	The Danish National Archives (DNA) & The Royal Library (KB-DK)	Kejser, U.B, Nielsen, A. B., Thirifays, A., 2012, Modelling the Costs of Preserving Digital Assets, Proceedings of the UNESCO Memory of the World Conference, Vancouver, Canada, http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/mow/VC_Kejser_et_al_27_B_1350.pdf Nielsen, A.B., Thirifays, A., Kejser, U.B, "Costs of Archival Storage", Proceedings of the Archiving 2012 Conference, 2012, 205-210, http://www.imaging.org/IST/store/epub.cfm?abstrid=45307

ID	Name	Creators	References
			<p>Kejser, U.B, Nielsen, A. B., Thirifays, A., 2011, Cost Aspects of Ingest and Normalization, Proceedings of the 8th International Conference on Preservation of Digital Objects (iPRES), 107-115 http://ipres2011.sg/conference-proceedings</p> <p>Kejser, U.B, Nielsen, A.B., Thirifays, A. 2011." Cost Model for Digital Preservation: Cost of Digital Migration". In: The International Journal of Digital Curation, Issue 1, Vol. 6, pp. 255-267 www.ijdc.net/index.php/ijdc/article/view/177</p> <p>CMDP tool: http://www.costmodelfordigitalpreservation.dk</p>
7	DP4lib cost model	Deutsche National Bibliothek (DNB)	<p>DP4lib Kostenmodell für Langzeitarchivierung, http://dp4lib.langzeitarchivierung.de/downloads/DP4lib-Kostenmodell_eines_LZA-Dienstes_v1.0.pdf</p> <p>http://aparsen.digitalpreservation.eu/pub/Main/CostModels/DP4lib-Cost-By-Service-CostModel.docx</p>
8	PrestoPRIME cost modelling tools	PrestoPRIME	<p>Addis, M., Jacyno, M., "Tools for modelling and simulating migration based preservation", PrestoPRIME, 2010, https://prestoprime.ina.fr/public/deliverables/PP_WP2_D2.1.2_PreservationModellingTools_RO_v1.00.pdf</p>
9	CDL cost model	California Digital Library (CDL)	<p>California Digital Library, (CDL), "Cost Modeling", https://wiki.ucop.edu/display/Curation/Cost+Modeling</p>
10	Cost model for SSADPA	Secure Business Austria (SBA) & Vienna University of Technology (TUWIEN)	<p>A cost model for small scale automated digital preservation archives (SSADPA), Strodl, S., Rauber, A., http://www.ifs.tuwien.ac.at/~strodl/paper/strodl_ipres2011_costmodel.pdf</p>
11	Economic Model of Storage	Rosenthal, D	<p>Rosenthal, D., "Economic model of Storage," November 2011, http://blog.dshr.org/2011/11/progress-on-economic-model-of-storage.html</p>
12	ESRM	Rusbridge, C. & Lavoie, B	<p>Rusbridge, C. "Update on the state of the Economic Sustainability Reference Model", https://unsustainableideas.wordpress.com/2011/10/17/update-state-ref-model/</p> <p>ESRM: Economic Sustainability Reference Model</p>
13	DP Benefit Analysis Tools	Charles Beagrie Limited	<p>http://beagrie.com/krds-i2s2.php</p>
14		ENSURE	<p>Badawy, M., Shehab, E., Baguley, P., Wilson, M., Towards a cost model for long term digital preservation</p>

ID	Name	Creators	References
			http://epubs.stfc.ac.uk/bitstream/7711/Towards%20a%20Cost%20Model%20for%20Long%20Term%20Digital%20Preservation.pdf

Appendix 3—Outline (working) of Final Report

Contents

Summary of Report

1. Introduction
 - a. Scope
 - b. Terms and definitions
2. Economic Models in the Field of Digital Curation (sub task 3.2.1)
3. Stakeholders’ Needs for Financial Information (sub task 3.2.2)
4. Model Evaluation Method (sub task 3.2.2)
5. Analysis of Gaps between Stakeholders’ Needs and Capabilities of Current Models (sub task 3.2.3)
6. Discussion
7. Conclusions and future opportunities

References

Appendices

Appendix 1 List and summary of Economic Models

Appendix 2 List of Stakeholders’ Needs

Appendix 3 Individual Result Reports from the Evaluation of Models

Appendix 4—LIFE Tool Feedback

No	Questions for survey	Answer form
1	Was the LIFE tool easy to use?	Yes/No
2	If you answered no, how could it be made more user-friendly:	Comments
3	Do the activities covered by the LIFE tool reflect your day to day activities?	Yes/No
4	If you answered no, please provide details of additional preservation related activities that you encounter in your work:	Comments
5	Have you tried to estimate digital preservation costs at your institution previously?	Yes/No
6	If so, please provide a brief description of the model(s) you've used:	Comments
7	Did the LIFE tool allow you to accurately describe the digital preservation scenario(s) for which you wished to estimate costs? <ul style="list-style-type: none"> • Very well—the information collected by the tool completely describes the scenario(s) • Quite well but not an exact match—a few extra details could be collected • Not very well—quite a lot of additional detail would need to be collected • Not well at all—would need to gather very different information to better describe the scenario(s) • I am unable to describe the scenario(s) using the fields provided by the tool 	Multiple choice
8	If the tool didn't allow you to accurately describe your digital preservation scenario(s), what additional information would need to be captured?	Comments
9	The tool currently assesses costs over whole years. Is this level of granularity sufficient?	Yes/No
10	What timescales do you want to be able to estimate costs over? <ul style="list-style-type: none"> • Less than two years • Two to five years • Five to ten years • Longer than ten years 	Multiple choice
11	Would a breakdown of costs over time be useful?	Yes/No
12	Would any additional outputs from the tool be useful? E.g., reports featuring graphs that break down costs against staff, equipment, etc.; recommendations for costs savings.	Comments
13	Have you any other comments on the LIFE tool?	Comments

Source: <http://www.dcc.ac.uk/dcc.ac.uk/projects/life/feedback>

Appendix 5—APARSEN questions

No	Area	Questions for analysis of cost models (Annex 2 in the APARSEN D32.1 report)
1	Scope	Which sector does this cost model relate to?
2		Which type of organisation does the model apply to?
3	Purpose	What is the purpose of the cost model? (i.e. budgeting, accounting, cost allocation, raising funds for projects)
4	Background	What are the origins of the model?
5		Where did the model come from?
6		How was it started?
7		Why was it needed?
8	Cost model data	What data was used to build/validate the model?
9	Applicability	Which preservation activity does this model relate to? e.g. 3rd party providing diverse services to different customers, one off activity, cost recovery approach, long term preservation arrangement
10	Reference to OAIS	Is there any reference to OAIS within the model?
11	Benefits	What are the benefits of the model?
12	Challenges	What are the challenges to the model itself (areas where considered weak/untested)?
13	Cost parameters	Are cost parameters clearly defined?
14		Can the cost parameters be set out against the headings in the table given (i.e. aligned to the ISO16363/OAIS)?
15	Validation of model	Has the cost model been validated? If so, provide details.
16	Tool support	If a tool is available within the model, is support available?
17	Availability	Has testing been completed?
18		Is the model available for use? If not, when will it be available?
19	References	What other work was cited/referenced?
20	Other	Any other information which may be of relevance

No	Questions used in survey (Chapter 4 p. 28-35 in the APARSEN D32.1 report)	Answer form
1	Reason for using a cost model <ul style="list-style-type: none"> • To inform decision makers • To find out the costs of preserving objects/items 	Multiple choice

- To ensure the efficient use of resources/budgets...
- For assessing the possible options available in order...
- Keep preservation budget as low as possible to...
- As part of a risk analysis
- In order to prioritise work
- Current digital preservation strategies
- Provide information for a bid & supply for external...
- Set up priced digital preservation services for third...
- No cost models implemented

2 On what bases would you select a cost model?

Multiple choice

- Model has been validated by similar organisation in you sector
- The scope of the model
- Is the model easy to use and adaptable
- Payment for the use of the model
- The support available to users of the model
- The information required to complete the model
- Length of time it takes to complete it
- The level of detail required to complete the model
- The format of the model

Appendix 6—Repository administrators' needs compiled by the CMDP project

Repository administrators and managers need financial information for budgeting, accounting and for charging.

No Need

- 1 Prepare and control budgets (adjust expenditures to the projected financing).
- 2 Delimit activities; which activities are included in the curation lifecycle and which are not.
- 3 Calculate/estimate the total costs of the included activities, and assess the distribution of costs over individual activities and groups of activities (also relevant for considerations regarding out-sourcing and in-sourcing)
- 4 Evaluate the effect of adjusting the cost of one lifecycle activity on the other activities. E.g. if the richness of metadata provided at ingest is decreased to save costs, it may induce increased costs at access.
- 5 Identify the most important costs (which require the most careful monitoring).
- 6 Understand the accounting principles underlying cost figures; E.g. do costs include full economic costs, i.e. the direct investment and operation costs, as well as indirect costs, such as the cost of general administration and facilities (overhead)? And if indirect costs are included, how are they distributed, e.g. as a percentage over all lifecycle activities, or on individual activities. And how are financial adjustments handled (e.g. inflation/deflation, discounting)?
- 7 Understand the assumptions on which estimates of future costs are based (e.g. on projections of historical data).
- 8 Optimise curation activities; enhance systems/processes, without compromising quality. For example by engaging in partnerships that allow exploiting economies of scale (e.g. in the area of archival storage) or economies of scope (e.g. by providing more versions of the same asset).

- 9 Attract additional funding from external stakeholders or by internal re-allocation of resources.
- 10 Balance budgets by reconsidering the quantity and/or the level of quality of the assets to be preserved.
- 11 Compare the costs of alternatives, e.g. the costs of applying different preservation strategies or the cost of increasing certain quality properties of the assets. . In order to execute such comparisons managers need to be able to account for the quality of the preservation activities. If, for example, the cost of migration processes are compared it is necessary to specify, among other things, how well significant properties of the assets are preserved; how many errors in the process are acceptable and how many random samples are needed to detect errors.

A.10 T3.3: Develop a cost concept model and gateway requirement specification (M10-M18)

Alex, I'd appreciate your thoughts on this in the first instance. Especially around the subject of handling 'Assumptions'. Then I'll add some time estimates and circulate to task participant contacts.

Note: as this Task starts at M10 I've included pre-Task commencement dependencies in an 'Assumptions' section. These can be cross-checked against other Information Dependency Profiles to make sure they're correct. Let me know if these need to be handled differently.

Also, I haven't found it practical to include every relevant input in a simple Excel Gantt but in almost all cases these are existing deliverables or milestones.

Task description

Revised Working Task Description

Description:

Note that this integrates the proposed interims Task stages into a Task Description to support work processes. It should not replace the DoW description which is the final arbiter against which we will be judged.

The Work Package will provide an initial review of draft 3.2 work to ensure these Tasks remain aligned, agree final definitions of high level deliverable concepts (Cost-Concept Model, Meta-Model, Gateway Specification) and their relationship with the Economic Sustainability Reference Model (T4.2). We will also clarify the relationship with the CCEX work (T3.4).

A draft methodology for T3.3 based on outputs from T3.2 order will be circulated to establish a common basis for the development of a concept model; initially to Task participants for review and then across the Project partners to agree a final list of "commonly referenced resources and standards" against which the concept model will be measured and critical concepts which must be integrated (terminology, preservation strategies, time span, accounting principles, implementation, etc.). Final definitions of scope high-level concepts and modelling approaches will be agreed.

A skeleton deliverable will be circulated and agreed with iterative versions shared within the project team. Interim versions or derived outputs will be used in Engagement work.

The goal of this task is not to create a single unified functional implementable cost modelling application; rather it is to design a common model based on common ncepts and a generic specification (a gateway specification) that can be used in follow-up R&D projects. The value built into this concept model will leverage the comprehensive engagement by the 4C project with various user communities and all of the detailed analysis of the requirements, drivers, obstacles and objectives that are related to that engagement. Ultimately, this concept model should be a critical input to the curation and preservation solutions and services that will inevitably arise from the commercial sector as 'supply' responds to a much better understood 'demand' for cost-effective and relevant tools.

Method: to be defined in response to other project deliverables

Milestones: None

Deliverables:

ID (T3.1)	Description	Deadline
D3.2	D3.2—Cost Concept Model & Gateway Requirement Specification	M18—July 14

Pre-Work Package Dependency Assumptions:

These assumptions are prepared to cover items which may impact T3.3 but which occur before T3.3 begins. All assumption should be validated (or revised) prior to the start of T3.3 (M10) via *T3.1 Information Dependencies Within the Project* and specifically *MS7- Functioning Information Dependency Profile* (M5) and/or via other Tasks/Deliverables noted below.

HL'H: Essentially I'll cross-check the other Information Dependency Profiles to confirm these assumptions are valid rather than try to build them into a Task Gantt at points before the Task actually begins.

ID (T3.1)	Description	Deadline
IO3.3.0.1	Assumption 1: Key stakeholders for T3.3	M10—Nov 13

Assumption 1: Key stakeholders for T3.3 “Cost Concept Model” are Cost Model Theorists with the “Gateway Specification” designed to support interpretation by Cost Model Product Developers (by inference therefore T3.4 CCEx Framework is a potential stakeholder!) and by Cost Model Implementers (those using cost models in their organisation at management level).

This Assumption should be validated by:

T2.1 Baseline Study of Stakeholders & Stakeholder Initiatives and specifically *D2.1—Initial Report on Stakeholders and Relevant Work* (M6)

T2.3 Engage with Stakeholders.

ID (T3.1)	Description	Deadline
IO3.3.0.2	Assumption 2: Any existing meta-model candidates/methodologies used by existing Cost Models will be identified prior to T3.3 commencing.	M10—Nov 13

Assumption 2: Any existing meta-model candidates/methodologies used by existing Cost Models will be identified prior to T3.3 commencing.

This assumption should be validated by:

T3.2 Evaluate Existing Cost Models and Needs & Gap Analysis and specifically by *MS12—Draft Cost Models Study / Needs & Gap Analysis* (see Risk 1)

ID (T3.1)	Description	Deadline
IO3.3.0.3	Assumption 3: Outputs from T4.1	M10—Nov 13

Assumption 3: Outputs from T4.1 Assessment of the Economic Determinants of Digital Curation will be integrated into T3.2 Evaluate Existing Cost Models and Needs & Gap Analysis (which of course feeds back into Assumption 2).

This assumption should be validated by:

T3.2 Evaluate Existing Cost Models and Needs & Gap Analysis and specifically by MS12—Draft Cost Models Study / Needs & Gap Analysis

T4.1 Assessment of the Economic Determinants of Digital Curation and specifically D4.1—Prioritised Assessment of Indirect Economic Determinants

ID (T3.1)	Description	Deadline
IO3.3.0.4	Assumption 4: Outputs from T4.2	M10—Nov 13

Assumption 4: Outputs from T4.2 Economic Sustainability Reference Model will be integrated into T3.2 Evaluate Existing Cost Models and Needs & Gap Analysis including those to “support the design of strategy; to influence and standardise terminology; and to assist with the declaration of roles and responsibilities in relation to curation and preservation.”

This assumption should be validated by:

T3.2 Evaluate Existing Cost Models and Needs & Gap Analysis and specifically by MS12—Draft Cost Models Study / Needs & Gap Analysis

T4.2 Economic Sustainability Reference Model (see Sub-task XXX) and specifically by MS9—Trial of Draft Economic Sustainability Reference Model

[NB there is an implicit assumption that T4.2 will end up being created iteratively, but that there should be a draft available from Chris and Brian pdq.!]

ID (T3.1)	Description	Deadline
IO3.3.0.5	Assumption 5: Outputs from T4.2	M10—Nov 13

Assumption 5: Outputs from T4.2 Economic Sustainability Reference Model will help clarify final definitions for an ‘Economic Sustainability Reference Model’ vs. ‘Meta-Models’, ‘Concept Models’ and ‘Gateway Specifications’

This assumption should be validated by:

T3.2 Evaluate Existing Cost Models and Needs & Gap Analysis and specifically by MS12—Draft Cost Models Study / Needs & Gap Analysis

T4.2 Economic Sustainability Reference Model (see Sub-task XXX) and specifically by MS9—Trial of Draft Economic Sustainability Reference Model

ID (T3.1)	Description	Deadline
IO3.3.0.6	Assumption 6: Early outputs from T3.4 CCEX Framework will identify possible co-dependencies with T3.3	M10—Nov 13

Assumption 6: Early outputs from T3.4 CCEX Framework will identify possible co-dependencies with T3.3

This assumption should be validated by:

T3.4 CCEX Framework

Sub-Tasks

Sub-task T3.3.1: Review/Response to MS12—Draft Cost Models Study / Needs & Gap Analysis (M10)

Description: Feedback to T3.2 on the draft *MS12—Draft Cost Models Study / Needs & Gap Analysis* (T3.2 M9) identifying the commonly referenced resources and standards (e.g. the OAIS Reference Model, PAIMAS, the DCC Lifecycle Model, COBIT guidance, ROI Calculator, etc.) and critical areas (terminology, preservation strategies, time span, accounting principles, implementation, etc.) raised in the analysis.

Inputs:

ID (T3.1)	Description	Deadline
MS12	MS12—Draft Cost Models Study / Needs & Gap Analysis (T3.2 M9)	M09—Oct 13

Outputs:

ID (T3.1)	Description	Deadline
IO3.3.1.1	T3.3-01 Document/Annotated Response to <i>MS12—Draft Cost Models Study / Needs & Gap Analysis</i>	?

Sub-task T3.3.2 Draft Task Methodology Circulated & Agreed (M11)

Description: A draft methodology for T3.3 based on outputs from T3.2 order is circulated to establish a common basis for the development of a concept model; initially to Task participants for review and then across the Project partners to agree a final list of “commonly referenced resources and standards” against which the concept model will be measured and critical concepts which must be integrated (terminology, preservation strategies, time span, accounting principles, implementation, etc.). Final definitions of scope high-level concepts and modelling approaches.

Note: we will finalise predicted Effort over each task month at this stage.

Inputs:

ID (T3.1)	Description	Deadline
D4.1	D4.1—Prioritised Assessment of Indirect Economic Determinants (M6)	M06—July 13
MS9	MS9—Trial of Draft Economic Sustainability Reference Model (M6 plus advances since that point)	M06—July 13

Outputs:

ID (T3.1)	Description	Deadline
IO3.3.2.1	T3.3-O2. Possibly an initial skeleton for the deliverable but probably a separate draft methodology document	M11—Dec 13

Sub-task T3.3.2 Skeleton Deliverable Structure (M13)

Description: Produce and circulate (at least) a skeleton (headings, scope, draft text etc) version of the deliverable in preparation for the review at M14. [Hurrah!]

Mini-Deliverable:

ID (T3.1)	Description	Deadline
IO3.3.3.1	T3.3-d1. Skeleton Deliverable Structure	M13—Feb 14

Sub-task T3.3.2 Interim Output for Engagement (M14)

For T2.3 MS19—Focus Group Meeting 3

Description: "The value built into this concept model will leverage the comprehensive engagement by the 4C project with various user communities and all of the detailed analysis of the requirements, drivers, obstacles and objectives that are related to that engagement"

Output:

ID (T3.1)	Description	Deadline
IO3.3.4.1	T3.3-O3. Interim Output for Engagement. To be defined	M14—March 14

Sub-task T3.3.2 Interim Output for Engagement (M16)

For T2.3 MS19—Focus Group Meeting 4 and T2.4 MS21—Outreach Workshop 2

Description: "The value built into this concept model will leverage the comprehensive engagement by the 4C project with various user communities and all of the detailed analysis of the requirements, drivers, obstacles and objectives that are related to that engagement"

Output:

ID (T3.1)	Description	Deadline
IO3.3.5.1	T3.3-O4. Interim Output for Engagement. To be defined	M16—May 14

Sub-task T3.3.2 Full Draft Deliverable (M17)

Description: Target is to get this deliverable circulated and addressed in June in preparation for the final deadline in July

Mini-Deliverable:

ID (T3.1)	Description	Deadline
IO3.3.6.1	T3.3-d2. Complete Draft Deliverable	M17—June 14

Task dependencies and timing—inputs and outputs

		Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15
No	Task	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24
3	Assessment																								
3.3	Cost Concept Model and Gateway Specification									⌠	O1	O2		d1	O3		O4	d2	D						
3.1	Information Dependencies Within the Project					⌠				⌠															
3.2	Evaluate Existing Cost Models and Needs & Gap Analysis																								
1.4	Reports to the European Commission														R										
2.1	Baseline Study of Stakeholders & Stakeholder Initiatives						D																		
2.3	Engage with Stakeholders				⌠						⌠				⌠			⌠							
2.4	Outreach Events																	⌠							
4.1	Assessment of the Economic Determinants of Digital Curation						D																		
4.2	Economic Sustainability Reference Model						⌠																		
3.4	CCEx Framework												⌠												

O1: Document/Annotated Response to MS12—Draft Cost Models Study / Needs & Gap Analysis (M10-Nov-13)

O2: Possibly an initial skeleton for the deliverable but probably a separate draft methodology document (M11 Dec-13)

d1: Skeleton Deliverable Structure (M13 Feb-14)

O3: Interim Output for Engagement. To be defined (M14 Mar-14)

O4: Interim Output for Engagement. To be defined (M16-May-14)

d2: Complete Draft Deliverable (M17-Jun-14)

D: Final Deliverable (D3.3)

Task risks**R1: Failure to validate documented assumptions before T3.3 begins in M10**

Impact is to reduce the effectiveness of the T3.3 deliverable (D3.2—Cost Concept Model & Gateway Requirement Specification)

Preventative measure is to ensure that these assumptions are built into the relevant task plans and all assumptions are validated or corrected by M5 when we have the MS7- Functioning Information Dependency Profile

R2: 3 month overlap between MS12—Draft Cost Models Study / Needs & Gap Analysis and D3.3—Final Cost Models Study / Needs & Gap Analysis Report.

Impacts T3.3 if amendments between the Draft and the Deliverable do not align with the work on T3.3

Preventative measure is close communication between T3.2 and T3.3 as D3.1 evolves

R2: Amendments to the T4.2 Economic Sustainability Reference Model after MS9—Trial of Draft Economic Sustainability Reference Model (M6) are not aligned with work on T3.3

Preventative measure is close communication between T3.3 and T4.2 as the *Economic Sustainability Reference Model* evolves but more importantly to highlight to potential reviewers that it may not be practical to fully align deliverables (as T4.2 ends in M24, 2 months after T3.3)

R3: Delivery of D4.3 from T4.3—Trustworthiness and Quality as an Economic Determinant occurs 3 months into T3.3

Impacts T3.3 if the findings of this report are not sufficiently integrated into the *D3.2—Cost Concept Model & Gateway Requirement Specification*.

Preventative measure is close communication between T3.3 and T4.2 as D3.2 evolves but more importantly to highlight to potential reviewers that these findings may not be fully integrated

R4: Delivery of D4.4 from T4.4—Report on Risk, Benefit, Impact and Value as an Economic Determinant occurs M18, at the same time as D3.2 from T3.3

Impacts T3.3 if the findings of this report are not sufficiently integrated into the *D3.2—Cost Concept Model & Gateway Requirement Specification*.

Preventative measure is close communication between T3.3 and T4.4 as D3.2 evolves but more importantly to highlight to potential reviewers that these findings may not be fully integrated

References**OAIS Reference Model,**

<http://public.ccsds.org/publications/archive/650x0m2.pdf>

PAIMAS,

<http://public.ccsds.org/publications/archive/651x0m1.pdf>

the DCC Lifecycle Model,

<http://www.dcc.ac.uk/resources/curation-lifecycle-model>

US Geological Survey lifecycle

<http://www.usgs.gov/datamanagement/why-dm/lifecycleoverview.php>

<https://my.usgs.gov/confluence/display/cdi/Scientific+Data+Life+Cycle+Model+for+the+USGS>

COBIT guidance,

<http://www.isaca.org/Knowledge-Center/Research/ResearchDeliverables/Pages/COBIT-Control-Practices-Guidance-to-Achieve-Control-Objective-for-Successful-IT-Governance-2nd-Edition.aspx>

ROI Calculator, etc <http://www.ncdd.nl/blog/?p=1849>

http://www.institute.nhs.uk/quality_and_service_improvement_tools/quality_and_service_improvement_tools/Return_on_Investment_%28ROI%29_calculator.html

Appendix B: Original Task Description for T3.3

The main objective of the Assessment group is to establish the most effective current methods for private and public sector organisations to estimate and compare the cost of digital curation, and to identify the most beneficial paths for future development of solutions and services. This will enable stakeholders to more effectively and comprehensively assess the investment of resources that may be required to sustain their digital preservation activities; and allow comparisons of existing and future tools and models with the knowledge that a broad range of criteria: e.g. price, savings, quality, value, risks, benefits, sustainability, etc., are implicit to the comparison.

Additional objectives are to:

- Assess and describe the work that has already been done in the area of curation cost modelling (to understand whether the current needs and requirements of stakeholders can be met with existing solutions and services)
- Create a template for the submission of requirements, actions and data into a shared knowledgebase that will help the broader community to better understand the economics of digital curation.
- Promote a cost specific terminology that will enhance standardisation and communication

The indicators of success of this work package will be its capability of routing inputs from the user community, the other work packages and the needs and gap analysis report into a generic specification that can be used in work package 5 (Roadmap), by the user community (Curation Costs Exchange Framework) and ultimately by follow-up R&D projects.

Appendix A: Original DOW for WP3

Task leader: UESSEX Participants: KBDK, DNA, HATII-DCC, SBA, UEDIN-DCC, KNAW-DANS

The Assessment group will develop a meta-model against which current and future cost models can be benchmarked. A methodology will be adopted based on the outputs of T3.2 and will be underpinned—or at least measured against—commonly referenced resources and standards (e.g. the OAIS Reference Model, PAIMAS, the DCC Lifecycle Model, COBIT guidance, ROI Calculator, etc. [See References]). In order to establish a common basis for the development of a concept model, the group will identify what may be required to build it, and will reach an agreement within a number of critical areas (terminology, preservation strategies, time span, accounting principles, implementation, etc.). The goal of this task is not to create a single unified functional implementable cost modelling application; rather it is to design a common model based on common concepts and a generic specification (a gateway specification) that can be used in follow-up R&D projects. The value built into this concept model will leverage the comprehensive engagement by the 4C project with various user communities and all of the detailed analysis of the requirements, drivers, obstacles and objectives that are related to that engagement. Ultimately, this concept model should be a critical input to the curation and preservation solutions and

services that will inevitably arise from the commercial sector as ‘supply’ responds to a much better understood ‘demand’ for cost-effective and relevant tools.

A.11 T4.1 A prioritised assessment of the indirect economic determinants of digital curation

Task description

Task 4.1 is to produce a taxonomy of the indirect economic determinants of digital curation. The *indirect economic determinants* are to be evaluated and ranked according to priorities of our target stakeholder communities.

Description

This task develops an evaluation of the relative importance of all the economic determinants of digital curation. The preliminary list includes: value, risk, benefits and sustainability but others have been defined in literature such as efficiency, reputation, interoperability, flexibility, transparency, trustworthiness, confidentiality, sensitivity, etc. Many of these can be folded into higher level concepts but within different stakeholder communities the priorities and constellations of these more detailed level aspects are apparent.

Method

A report will be produced using a mixture of:

- desk research for establishing state of the art (via WP3)
- empirical knowledge from within the project consortium, and
- information collected through consultations with the community (via WP2),

resulting in a taxonomy of the economic determinants of digital curation.

Deliverables

D4.1 Prioritised Assessment of Indirect Economic Determinants

Information dependencies

The report interacts with:

- T3.1—information dependency profile
- T3.2—state of the art analysis
- T2.1—identification of stakeholders
- T2.3—engagement activities.

Work plan

a. *General*

Although the DoW talks interchangeably about *indirect economic determinants* and *all the economic determinants* of digital curation under this Task, the focus is clearly only on *indirect economic determinants*, as listed and explained in the task description of the DoW.

The work tasks within T4.1 are straightforward:

T4.1.1 Define the “indirect economic determinant” (i.e. what distinguishes it from direct determinants).

T4.1.2 Identify and describe indirect economic determinants from:

- Project partners
- Desk research (WP3 work, APARSEN, T4.2)
- Stakeholders (once they are selected in WP2)

T4.1.3 Evaluate and rank indirect economic determinants based on early indications from stakeholders (via WP2).

b. *Sub-Task 4.1.1*

Description: Defining how the term “economic determinant” will be understood in the project, and defining how this could be logically broken down into “direct” and “indirect”.

Work plan:

Use the examples in the DoW and collected during the kick-off meeting. Discuss with Task partners and propose a working definition into the project Glossary. Request partner feedback and comments. Finalise the definition.

Mini-deliverable:

ID (T3.1)	Description	Deadline
IO4.1.1.1	D4.1.1 Working definition(s) in the glossary	M02—March 13

Inputs from other WPs: None

Outputs to other WPs:

ID (T3.1)	Description	Deadline
IO4.1.1.2	Glossary entry	M02—March 13

Glossary entry

Deadline: end of March

c. *Sub-Task 4.1.2*

Description: Compile a list of relevant indirect economic determinants.

Work plan:

Crowd-sourcing during the project kick-off meeting and through the project e-mail list.

Desk research to collect indirect determinants from existing cost models and analyses:

- ESRM (combine with work in Task 4.2)
- State of the art analysis in Task 3.2
- APARSEN work
- Other cost models and texts

Discussions with stakeholders

- Requires interaction with Tasks 2.1 and 2.3 to determine who the key stakeholders are that we should approach and how we can engage them in thinking about indirect economic determinants.

Mini-deliverable:

ID (T3.1)	Description	Deadline
IO4.1.2.1	D4.1.2 Preliminary list / taxonomy of indirect economic determinants	M04—May 13

This preliminary list will be evaluated for its suitability for presentation in the form of an ontology. It may be that some of the concepts (aka determinants) may be considered by some to be attributes of other concepts.

Inputs from other WPs:

ID (T3.1)	Description	Deadline
IO4.1.2.2	Task 3.2—Glossary	M04—May 13
IO4.1.2.3	Task 3.2—State of the art analysis	M04—May 13

Task 3.2—glossary and state of the art analysis

Outputs to other WPs:

ID (T3.1)	Description	Deadline
IO4.1.2.4	Discussions with Tasks 2.1 and 2.3	M04—May 13

Deadline: end of May

d. *Sub-Task 4.1.3*

Description: Evaluate and prioritise the preliminary list of indirect economic determinants.

Work plan:

Engage stakeholders in the discussion through an (on-line) focus-group or a mini-survey (?). Discuss with Task 4.2 ESRM for priorities. Discuss with project partners. Rank determinants. Produce the report

Deliverable:

ID (T3.1)	Description	Deadline
D4.1	D4.1—Prioritised Assessment of Indirect Economic Determinants	M0—July 13

Inputs from other WPs:

ID (T3.1)	Description	Deadline
IO4.1.3.1	Interaction with T2.3	M05—June 13
IO4.1.3.2	Interaction with T4.2 ESRM	M05—June 13

Interaction with T2.3; T4.2 ESRM

Outputs to other WPs: None

Deadline: end of July (M6)

Task dependencies and timing—inputs and outputs

		2013	Feb	Mar	Apr	May	Jun	Jul
No	Task	Resources	M1	M2	M3	M4	M5	M6
T4.1	Indirect economic determinants	0.2		x				
T4.1.1	Definition			x				
O1	Glossary entry			x				
T4.1.2	Draft list of indirect economic determinants	1				x		
I1	T3.2 State of the art analysis				x			
O1	T2.3 Stakeholder engagement					x		
T4.1.3	Final D4.1	0.8						x
I1	T2.3 Stakeholder engagement						x	
I2	T4.2 ESRM						x	

Task risks

Risk 1—Difficulty in separating direct and indirect economic determinants or in finding a suitable format for describing the determinants.

Impact: Low

Mitigation: Use examples from existing studies and cost models, rely primarily on ESRM.

Risk 2—Failure to engage with relevant stakeholders to carry out the evaluation and ranking of indirect economic determinants.

Impact: Medium (results: a different ranking of importance will emerge during the project when other stakeholders are consulted)

Mitigation: Use project partners' experience. Update the priority of indirect determinants in the final version of the ESRM.

Risk 3—Failure to produce an agreed priority list of indirect economic determinants

Impact: Low

Mitigation: Use project partners' experience. Update the priority of indirect determinants in the final version of the ESRM.

A.12 T4.2 Economic Sustainability Reference Model

Task description

Task 4.2 is to develop and trial an economic sustainability reference model. The model will be developed in draft, trialed and assessed as an early milestone (month 6) and then refined and assessed throughout the project to gauge its fitness for purpose and utility for use by the wider community. The purpose of it is three-fold.

1. To inform and support digital curation strategies and planning
2. To influence and standardize terminology
3. To assist with the declaration of roles and responsibilities in relation to digital curation

An additional aim of the model is to emphasise that the ultimate purpose of digital curation is always to deliver value and benefits and that the costs of curation should never be considered in isolation of the strategic and tactical context in which it takes place.

This task has an early milestone and then a final deliverable in month 24 which will report on the progress of development that the model has reached by the end of the project duration and the level of engagement and acceptance that it has elicited from the community.

T4.2—Develop and Trial an Economic Sustainability Reference Model

Description: The first task is to draft a report containing text and graphics that demonstrates and describes the concept of the economic sustainability reference model; with the possibility that some of the graphics/diagrams and aspects of the text may be used discreetly from the longer report in a variety of presentational contexts. The second task is an additional written output detailing the reception and opinion of the model by the wider community.

Method: Work with WP4 partners to iteratively review the development of the model: beginning by building on the existing work (post Blue Ribbon Task Force); progressing through to more general reviews by the whole consortium; and then release to the wider community through presentation at workshops and focus groups; ensuring that consortium opinion and the wider community reaction (including adoption if relevant) is recorded along the way.

Milestones:

ID (T3.1)	Description	Deadline
MS9	MS9—Trial of the draft economic sustainability reference model	M06—April 2013

Deliverables:

ID (T3.1)	Description	Deadline
D4.2	D4.2—Assessment of Community Validation of the Economic Sustainability Reference Model	M24—Jan 15

Sub-task T4.2.1—Review ESRM Phase I and Direction Planning

Description: Revision of existing work on the ESRM (phase I work) and circulation of notes

Method: Review the existing ESRM material (phase I); principally Chris Rusbridge and Brian Lavoie’s work as represented on the former’s blog; the video record of the ESDI Roundtable meeting (Estonia May 2011); and any notes available from the Bristol IDCC workshop (Dec 2011). Then make recommendations for action and outline the direction of travel.

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO4.2.1.1	d4.2.1 Working document	M03—April 2013

Inputs: None (will need input from Brian Lavoie—advisory board member)

Outputs: Distribute to INESC-ID, UEssex, NLE for comment (and to Brian Lavoie). It may also provide useful information for:

O1 –T4.1 (determinants)

O2—T2.1 (stakeholders)

O3—T2.3 (engagement)

Timescale—end of April

Sub-task T4.2.2—Draft 1 of ESRM Phase II Concepts

Description: Working document outlining the conceptual basis of the ESRM phase II model and its rationale

Method: Digest and reflect on partner feedback on MD4.2.1 (and any input via information dependencies—as above); then draft phase II concepts document

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO4.2.2.1	d4.2.2 Working document	M04—May 2013

Inputs:

ID (T3.1)	Description	Deadline
D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives	I1—T2.1 (check against any stakeholder initiatives that may be duplicative or complementary to ESRM work)	M04—May 2013
D4.1—Prioritised Assessment of Indirect Economic Determinants	I2—T4.1 (Need to factor in emerging range of economic determinants to check against initial ESRM thinking)	M04—May 2013

Outputs: Distribute to INESC-ID, UEssex, NLE for comment (and to Advisory Board)

O4—T4.1 (Re-factored into emerging determinants)

Timescale—end of May

Sub-task T4.2.3—Draft 2 of ESRM Phase II Concepts + Diagrams

Description: Working document with early draft versions of the descriptions and diagrammatic depictions of the model

Method: Review feedback on MD4.2.2 (and any input via information dependencies—as above); then draft phase II concepts + diagram working documents

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO4.2.3.1	d4.2.3 Working document	M05—June 2013

Inputs:

ID (T3.1)	Description	Deadline
IO4.2.3.2	I3—T2.3 (Engagement with stakeholders—if any views forthcoming about sustainability issues and opinions on requirements and demand for a model)	M05—June 2013
IO4.2.3.3	I4—T3.2 (Evaluation of cost models and needs & gap analysis—emerging indications of a need or a gap for a conceptual modeling approach)	M05—June 2013
D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives	I1—T2.1 (check against any stakeholder initiatives that may be duplicative or complementary to ESRM work)	M05—June 2013
D4.1—Prioritised Assessment of Indirect Economic Determinants	I2—T4.1 (Need to factor in emerging range of economic determinants to check against initial ESRM thinking)	M05—June 2013

Outputs: distribute to all partners for comment

O5—T3.3 (For assessment by for cost concept model—starting month 10)

Timescale—end of June

Sub-task T4.2.4—Public Draft of ESRM Phase II Model and monitoring framework

Description: Public document for trial release of the ESRM phase II model including framework for assessing community reaction (as appendix to model documentation)

Method: Digest and reflect on partner feedback on MD4.2.3 (and any input via information dependencies—as above); then create public draft document

Mini-Deliverables:

ID (T3.1)	Description	Deadline
IO4.2.4.1	d4.2.4—Public draft document for release to community on a trial basis	M06—July 2013

Inputs:

ID (T3.1)	Description	Deadline
IO4.2.3.2	I3—T2.3 (Engagement with stakeholders—if any views forthcoming about sustainability issues and opinions on requirements and demand for a model)	M06—July 2013
IO4.2.3.3	I4—T3.2 (Evaluation of cost models and needs & gap analysis—emerging indications of a need or a gap for a conceptual modeling approach)	M06—July 2013
D2.1—Baseline Study of Stakeholders & Stakeholder Initiatives	I1—T2.1 (check against any stakeholder initiatives that may be duplicative or complementary to ESRM work)	M06—July 2013
D4.1—Prioritised Assessment of Indirect Economic Determinants	I2—T4.1 (Need to factor in emerging range of economic determinants to check against initial ESRM thinking)	M06—July 2013

Outputs: Public release as Milestone 9

O6—For inclusion and use by T2.3 (engagement)

O7—and T2.4 (outreach)

*Timescale—end of July***Task dependencies and timing—inputs and outputs**

		2013	feb	mar	apr	maj	jun	jul	jan
No	Task	Resources	M1	M2	M3	M4	M5	M6	M24
D4.2	ESRM Model								X
d4.2.1	Working document phase I review/directions				x				
O1	T4.1 (economic determinants)				x				
O2	T2.1 (stakeholder initiatives)				x				
O3	T2.3 (Engagement)				x				
d4.2.2	Working document draft 1 ESRM					x			

		2013	feb	mar	apr	maj	jun	jul	jan
No	Task	Resources	M1	M2	M3	M4	M5	M6	M24
I1	T2.1 (stakeholder initiatives)					x			
I2	T4.1 (economic determinants)					x			
O4	T4.1 (economic determinants)					x			
d4.2.3	Working document draft 2 ESRM						x		
I1	T2.1 (stakeholder initiatives)						x		
I2	T4.1 (economic determinants)						x		
I3	T2.3 (Engagement)						x		
I4	T3.2 (Evaluation, needs & gaps)						x		
O5	T3.3 (cost concept model) ... month 10								
d4.2.4	Public draft of ESRM + framework							x	
O6	T2.3 (Engagement)							x	x
O7	T2.4 (Outreach)							x	x
MS9								x	

- O1—<< Output name >>—<< Month number >>—<< Month of year >>
- I1—<< Input name >>—<< Month number >>—<< Month of year >>
- d2—<< Mini-deliverable name >>—<< Month number >>—<< Month of year >>
- MS7—<< Milestone name >>—<< Month number >>—<< Month of year >>
- D3 << Deliverable name >>—<< Month number >>—<< Month of year >>

Task risks

<< Short risk description with causes, impacts, consequences and preventive actions >>

Risk 1—It becomes apparent that the direction of the 4C work on ESRM needs to diverge from the original intentions of the authors of the ESRM and a schism occurs. This will be handled through careful communication and negotiation. If ultimately necessary, versioning and branding issues can be discussed and separate initiatives can be announced and pursued. The presence of Brian Lavoie on the Advisory Board should help prevent this occurrence.

Risk 2—Early feedback from the 4C stakeholders indicate that there is little or no demand for, or interest in, an ESRM. This could be down to a failure to communicate the purpose of an ESRM effectively and some enhanced effort would need to be directed at communicating its purpose and potential.

Risk 3—Representing the ESRM concisely and effectively in graphic or textual descriptions proves to be beyond the ability of the project partners responsible for delivering the model. If this is the case, an external consultant might be engaged to advise on better visualization of the model.

A.13 4.3 Trustworthiness and quality as an economic determinant in digital curation

Task description

This task is going to produce a case study report on the overhead, cost, intellectual input and the eventual benefits that may accrue of undergoing audit and certification procedures to become a ‘trusted digital repository’ (TDR) or similar nomenclature.

Description

The costs of setting up and maintaining relevant levels of certification can be a major cost component for digital repositories, and as the requirements of the relevant standards are open to interpretation, the actual costs of implementation can vary considerably.

The relative costs and benefits of a TDR-status must be examined, independently from the assessment of the TDR-standards themselves, in order to ensure an independent and impartial assessment of the relationship between the costs and benefits of implementing and maintaining those standards. The task will also consider some of the more subtle issues around trust and quality such as organisation size and structure, level of control over policy, degree of outsourcing (trust of third parties) and the level of formal governance.

The aim of this task is to identify different components of trust and study how different stakeholders approach trust. The output from the Task is to show how costing of digital curation can include consideration of trust—this is a significant gap in the existing cost models. Quality is viewed as a sub-part of trust.

Method

The Task is to produce as a case study report. The report will be based on:

- desk research of existing cost data on audit and certification, especially the pilot audits and publications of the APARSEN and DPE projects;
- empirical knowledge from within the project consortium (UKDA, DANS and others);
- information collected through consultations with the community.

The results will be written up as a report that:

- outlines a method for calculating the costs and benefits of audit and certification
- analyses available audit and certification cost data;
- makes recommendations for the economic sustainability model.

Deliverables

This Task results in a deliverable D4.3 *Report on Trustworthiness and Quality*. The deliverable is due on month 12 of the project (January 2014).

Information dependencies

The report interacts with:

- T4.1—indirect economic determinants [input from]
- T4.2—updated economic sustainability model [output to]
- T3.1—glossary.

Work plan

2.1 General

During the project negotiation a worry was raised that this task may duplicate work that is on-going elsewhere, particularly in the APARSEN project. The final description of the task was, therefore, modified to reflect more the economics of deciding to undertake and going through an audit that leads to a certificate. The economic benefits of auditing and certification versus various costs these incur have not been studied and modelled yet. The benefit of this task and its deliverable would be to make public the economic aspects of the experiences that our partners and other repositories have gained through the APARSEN pilot audits with ISO 16363 but also the ISO 27001 audits and assessments with DSA and DRAMBORA.

The work within T4.3 can be divided into three sub-tasks:

T4.3.1 Desk research on what cost data on audit and certification of digital repositories exists.

T4.3.2 Collect cost data from repositories that have undergone an audit or assessment.

T4.3.3 Analyse the collected data and develop a model for estimating audit and certification costs.

2.2 Sub-Task 4.3.1

Description: Desk research on what cost data on audit and certification of digital repositories exists and what useful (cost) data can be gleaned from this.

Work plan:

- Maintain contact with the APARSEN project and peruse their deliverables.
- Study the experience of CRL and TRAC certifications in the US
- Study (possibly by contacting the EC officers) the state of the European Framework for TDR Audit
- Study records management standards and auditing (ISO30300)
- Study DAF, AIDA tools (see DCC)
- Study information security (ISO27000) auditing and certification practice and costing models
- Literature search—OCLC journals, IJDC, Archival Science, Information Security, Digital Library, etc.
- Identify gaps in publically available cost data that need to be filled by sub-task 4.3.2 in order to produce the final deliverable.

Lead: INESC-ID, contributions from NLE, UKDA

Mini-deliverable:

ID (T3.1)	Description	Deadline
IO4.3.1.1	D4.3.1 Summary of publically available cost data and audit cost models (first iteration of the deliverable report)	M06—July 2013
IO4.3.1.2	Inputs from other tasks: T4.1 and T3.1—definitions and glossary entries of key terms	M06—July 2013
IO4.3.1.3	Outputs to other tasks: updates to definitions of key terms	M06—July 2013

Deadline: end of July 2013 (m3 of the Task, m6 of the Project)

2.3 Sub-Task 4.3.2

Description: Collect cost data from repositories that have undergone an audit or assessment.

Work plan:

- Based on the output from sub-task 4.3.1 define the questions that need to be asked (data collection tool).
- Include some cost data that we already have and design a data collection tool that asks people to confirm or enhance the data we have.
- Identify repositories that have undergone audit and/or assessment, establish contact and negotiate participation in a survey.
- Develop a survey tool to collect cost data from organisations that agreed to participate.
- Run interviews / consultation with the participants to collect actual cost data.
- Summarise survey results and identify potential remaining gaps.
- Consult project AB regarding the remaining gaps.

Lead: UKDA, contributions from NLE, JISC, DCC, DANS, SB, DB, etc.

Mini-deliverable:

ID (T3.1)	Description	Deadline
IO4.3.2.1	D4.3.2 Summary of cost data collected through survey (second iteration of the deliverable report)	M09—October 2013

Inputs from other tasks: -

Outputs to other tasks: none

Deadline: end of October 2013 (m6 of the Task, m9 of the Project)

2.4 Sub-Task 4.3.3

Description: Analyse the collected data and develop a model for estimating audit and certification costs.

Work plan:

- Based on the output from sub-tasks 4.3.1 and 4.3.2 develop a cost estimation model for auditing a digital repository.
- Discuss the benefits of undergoing an audit or assessment (return on investment), rely on T4.1 definitions in doing this.
- Develop recommendations for the T4.2 Economic sustainability model.
- Write up the final report.

Lead: UKDA and NLE, contributions from JISC, INESC-ID

Final deliverable:

ID (T3.1)	Description	Deadline
D4.3	D4.3 <i>Report on Trustworthiness and Quality</i>	M12—Jan 2014
IO4.3.3.1	Inputs from other tasks: T4.1	M12—Jan 2014
IO4.3.3.2	Outputs to other tasks: T4.2	M12—Jan 2014

Deadline: end of January 2014 (m9 of the Task, m12 of the Project)

Task dependencies and timing—inputs and outputs

T4.3	Trustworthiness and quality	2013	May	July	Oct	Jan
No	Task	Resources	M1	M3	M6	M9
T4.3.1	Desk research			X		
I1	T4.1, T3.1 Glossary entries		x			
O1	T4.1 T3.1 Updated glossary entry			X		
T4.1.2	Repository survey				X	
I1	T4.2 ESRM			X		
O1	-				X	
T4.1.3	Final D4.3					X
I1	T4.1 Indirect economic determinants				x	
O1	T4.2 ESRM					X

Task risks

Risk 1—Difficulty in collecting audit cost data.

Impact: High

Mitigation: Combine desk research based and survey data.

Risk 2—Failure to get repositories to agree to share their audit cost data.

Impact: Medium

Mitigation: Combine desk research based and survey data.

A.14 T4.4 The role of risk, benefit, impact and value as an economic determinant in digital curation

Task description

This task will look at a range of interrelated issues from the risk management perspective. In most organizations in the corporate world the trade-off between costs is value, however for some organizations from different backgrounds and sizes this can very troublesome with very complicated equations.

This task will use case studies to study the role of risk and risk analysis in relation to curation activities as an enabler and driver for governance. It will also look into not only cost but also benefit, impact and value both in terminology and by sector to characterize the influence of these factors as determinants.

This task will look at issues such as the loss and recovery form loss as opposed to preventive curatorial action, from a risk perspective.

This task has a deliverable

ID (T3.1)	Description	Deadline
D4.4—Report on Risk, Benefit, Impact and Value	D4.4—Report on Risk, Benefit, Impact and Value in M18	M18—July 14

The envisioned objectives of T4.4 are:

Refinement of the prioritized assessment of the indirect determinants of digital curation (T4.1)

Description: T4.4 will look into the work done in T4.1 and refine it.

Method: Validate the assessment method and prioritization of determinants of digital curation in T4.1

Inputs:

ID (T3.1)	Description	Deadline
D4.1—Prioritised Assessment of Indirect Economic Determinants	I1—Input from T4.1 (A prioritized assessment of the indirect economic determinants of digital curation).	M06—July 13

Output:

ID (T3.1)	Description	Deadline
IO4.4.1.1	O1—A refinement of the prioritized assessment of the indirect economic determinants of digital curation	M11—Dec 13

Detail of the role of risk in curation activities

Description: T4.4 will look into techniques/tools already being used in curation to assess and manage risk.

Method: Look into case studies in order to identify risk management techniques used and identify gaps in those techniques. In case no risk techniques are used in a specific use case explain how risk management techniques would lower costs of curation.

Inputs:

ID (T3.1)	Description	Deadline
D4.1— Prioritised Assessment of Indirect Economic Determinants	I1—Input from T4.1 (A prioritized assessment of the indirect economic determinants of digital curation).	M06—July 13

Output:

ID (T3.1)	Description	Deadline
IO4.4.2.1	O2—Document detailing the role of risk in curation activities.	M13—Feb 14

The role of benefit, impact and value in curation activities

Description: T4.4 will assess the role of benefit, impact and value to prioritize and motivate costs in curation. These three points can easily motivate costs, for example benefit, if it outgrows the cost of a curation activity, the costs are justified. Moreover, if we use a compound with benefit and risk we can even better motivate cost.

Method: Evaluate the role of benefit, impact and value against curation activities and between each other and the curation activities.

Inputs:

ID (T3.1)	Description	Deadline
D4.1— Prioritised Assessment of Indirect Economic Determinants	I1—Input from T4.1 (A prioritized assessment of the indirect economic determinants of digital curation).	M06—July 13

Output:

ID (T3.1)	Description	Deadline
IO4.4.3.1	O3—Document detailing the role of benefit, impact and value in curation activities.	M15—April 14

Comparison of risk factors

Description: T4.4 will look into several risk factors such as the issue of loss and recovery from loss as opposed to preventive curatorial action.

Method: Compare several risk factors for curation to compare, for example, risk treatment scenarios against scenarios where an identified risk was not treated.

Inputs:

ID (T3.1)	Description	Deadline
IO4.4.2.1	I2—Document detailing the role of risk in curation activities from the task “Detail of the role of risk in curation activities”.	M13—Feb 14

Output:

ID (T3.1)	Description	Deadline
IO4.4.4.1	O4—Document detailing the comparison of risk factors.	M17—June 14

Task dependencies and timing—inputs and outputs

		2013/2014	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
No	Task	Resources	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18
4.4	The role of risk, benefit, impact and value as an economic determinant in digital curation	INESC-ID=4 JISC=? Uessex=? NLE=?	I1												D4.4

		2013/2014	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
No	Task	Resources	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18
4.4.1	Refinement of the prioritized assessment of the indirect determinants of digital curation (T4.1)		I1					O1							
4.4.2	Detail of the role of risk in curation activities		I1							O2					
4.4.3	The role of benefit, impact and value in curation activities		I1									O3			
4.4.4	Comparison of risk factors									I2				O4	

- I1—Input from T4.1 —M6—July 2013
- I2—Document detailing the role of risk in curation activities from the task “Detail of the role of risk in curation activities” —M13—February 2014
- O1—A refinement of the prioritized assessment of the indirect economic determinants of digital curation—M11—December 2013
- O2—Document detailing the role of risk in curation activities—M13—February 2014
- O3—Document detailing the role of benefit, impact and value in curation activities—M15—April 2014

- O4—Document detailing the comparison of risk factors—M17—June 2014
- D4.4—Report on Risk, Benefit, Impact and Value—M18—July 2014

Task risks

- R1—T4.4 doesn't receive useful content from T4.1

A.15 T4.5 From costs to business models

Task description

This task focuses on institutions which offer preservation as a service. In the course of task T4.5 we will investigate:

- potential business models and analyse the types of services needed,
- ways that these can be provided,
- options for fee structures.

To do this the task will build on:

- the customer needs as surfaced by WP2,
- the cost drivers identified by WP3,
- the economic sustainability, trust, risk and impact analyses from WP4.

Task dependencies and timing—inputs and outputs

ID (T3.1)	Description	Deadline
D2.1 Baseline Study of Stakeholders & Stakeholder Initiatives	I1—D2.1 Baseline Study of Stakeholders & Stakeholder Initiatives	M12—Jan 14
IO4.5.1.1	I2—DRAFT of Stakeholder Report	M12—Jan 14
D3.1 Evaluation of Cost Models & Needs & Gap Analysis	I3—D3.1 Evaluation of Cost Models & Needs & Gap Analysis	M12—Jan 14
D4.1 Prioritized Assessment of Indirect Economic Determinants	I4—D4.1 Prioritized Assessment of Indirect Economic Determinants	M12—Jan 14
D4.3 Report on Trustworthiness and Quality	I5—D4.3 Report on Trustworthiness and Quality	M12—Jan 14
IO4.4.3.1	I6—DRAFT of D4.4 Report on Risk, Benefit, Impact and Value	M12—Jan 14
D4.4 Report on Risk, Benefit, Impact and Value	I7—D4.4 Report on Risk, Benefit, Impact and Value	M18—Aug 14

ID (T3.1)	Description	Deadline
IO4.5.1.2	O1—DRAFT of D4.5 for T5.3 and D5.2	M21—Nov 14
D4.5 From Costs to Business Models	D1—D4.5 From Costs to Business Models	M24—Jan 15

Task risks

- R1—T4.5 doesn't receive needed input from other tasks...in time or at all.
- R2—Task participant(s) quits the project.
- R3—Task participants misunderstood the aim of the task.
- R4—Task participant(s) deliver poor quality of work.