Project no. SPI-CT-2008-219301-NET-HERITAGE

NET-HERITAGE

EUROPEAN NETWORK ON RESEARCH PROGRAMME APPLIED TO THE PROTECTION OF TANGIBLE CULTURAL HERITAGE

Instrument:

Deliverable 2.1

Report on architecture and contents of the web portal. Development of a site specification by the project manager/executive producer and agreed by the Observatory Advisory Editorial Board.

Due date of deliverable: 31st January 2008

Actual submission date: 3rd March 2009

Start date of project: October 2008   Duration: 3 Years

Ministry of Cultural Heritage and Activities (Italy)

Project coordinator: Antonia P. Recchia

Project co-funded by the European Commission within the Seven Framework Programme (2007-	
Dissemination Level	
P	Public	
P	Restricted to other programme participants (including the Commission	
R	Restricted to a group specified by the consortium (including the	X
C O	Confidential, only for members of the consortium (including the Commission Services)	

1. Introduction

This deliverable report on task 2.1 by the Work Package 2 leader, the Arts and Humanities Research Council (AHRC) presents work undertaken as part of the ERA-NET 'European network on Research Programme applied to the Protection of Tangible Cultural Heritage' known as 'NET-HERITAGE'. Specifically, it covers the first task under Work Package 2: *the creation of European NET-HERITAGE observatory on cultural heritage research exchange of information*. The report describes the aims of task 2.1 and the work achieved in the six months between October 2008 and March 2009 including the development of a draft functional specification and user case scenarios.

1.1 Context and overview of the Net-Heritage Observatory

A full outline of NET Heritage and its objectives can be found on the project website (www.netheritage.eu) and the project is fully described in the Description of Work.

Work Package 2, the creation of the Observatory (or web portal) is led by AHRC on behalf of the UK. The Observatory addresses a need that exists at a European level to provide a platform for the exchange of peer-reviewed scientific research and policy documents among academic researchers, heritage experts, institutional managers and policy makers.

A European-wide NET-Heritage Observatory is intended to have a profound impact on the scope and effectiveness of RTD activities in participating member states. In providing an infrastructure to support knowledge transfer and the flow of data, it will also provide a mechanism for much-needed coordination of activity between member states.

The ultimate aim of the Observatory will be to disseminate to end-users (both expert and non-expert):

-   contributions from European and national programmes
-   results and outcomes of heritage research
-   news on research issues
-   views and information about heritage science

1.2   Scope and aims of Task 2:1

The aims of task 2.1 as taken from the Description of Work are:

- Development of a site specification by the project manager/executive producer of the web portal and agreed by the Observatory Editorial Advisory Board.

- Appointment of a project manager/executive producer to drive the development of the Observatory.

- Formation of an Observatory Editorial Advisory Board selected from among the NET-HERITAGE Partners and to include one or two key external members, the former to provide the content and the latter to ensure content quality of the Observatory.

- Agreements will be made with all NET-HERITAGE Partners concerning the receipt of sample content, consisting of scientific research for the protection of cultural heritage, in English. After the testing, an evaluation will be made by the

Observatory Editorial Advisory Board on whether the Observatory should be multilingual.

2. First six-month report (October 2008-March 2009)

Following a selection process, a project manager was officially appointed to Work Package 2 on the 13th October 2008, based at the AHRC and working full time on the NET HERITAGE project. A number of tasks followed the initial meeting in Rome – creation of the Observatory Editorial Advisory Board in order to monitor content for the web portal; setting up of a UK Stakeholders group of heritage agencies, creation of a sample content template in order to gather content for the Observatory and development of the site specification and functional requirements alongside the Observatory Sub-contractor. The AHRC/EPSRC Programme Director for Science and Heritage who sits on the NET-HERITAGE Executive Board also advises AHRC on this project.

2.1 Creation of the Editorial Advisory Board

Following an initial email to all partners by the Work Package 2 project manager to select the members of the Observatory Editorial Advisory Board, invitation letters and terms of reference were sent out in November 2008. In addition, invitation letters were also sent to the two external members of the Advisory Board who were agreed at the kick off Executive Board meeting in Rome. Acceptances were received from all 11 members.

Please see Annex A for the Invitation letter, terms of reference and list of members.

The Observatory Editorial Advisory Board has been set up to:

- Provide or facilitate the provision of content to the Observatory

- Add value through peer review of all content

- Monitor the quality and relevance of information

- Evaluate the need for multi-linguality

Two informal meetings have taken place in London in order to update Board members newly involved in the Observatory development. Minutes of the meeting were distributed to all members of the Editorial Advisory Board who were encouraged to set up similar meetings within their work packages for information gathering between the formal six monthly meetings of the Board. The first official meeting will take place on the 25th March 2009 in Berlin and an agenda has been circulated in early February.

Please see Annex B – Observatory Editorial Advisory Board Agenda

Members of the Editorial Advisory Board were sent the sample content template for comment – please see below (2.3) for details on the sample content template.

2.2   Set up of the UK stakeholders group

Due to the distributed and devolved nature of UK heritage agencies, it was necessary to find a mechanism to consult with them in order to represent the UK as a whole

within the NET HERITAGE project. Following the kick-off meeting in Rome, a meeting of UK stakeholder representatives took place on 20th October 2008. A presentation of the project agreed by MiBAC was given to the UK stakeholders. The focus of the meeting was to communicate information on the UK role in NET-Heritage, discuss the mechanisms for gathering content for the NET-Heritage Observatory from the UK and agree a schedule for future contact.

Membership of the group, known as the UK stakeholders consists of:

England: English Heritage, Museums Libraries and Archives Council, Natural Environment Research Council.

Scotland: Historic Scotland, Museums Galleries Scotland

Wales: The Historic Environment Service of the Welsh Assembly Government (CADW), Museums Archives and Libraries Wales (CyMal)

Northern Ireland: Department of Environment for Northern Ireland

The UK group will meet prior to every Consortium meeting of the partners.

2.3   Content template
As part of task 2.1 a sample content template was designed for gathering content systematically for the Observatory. An initial draft was put together and sent out to all NET Heritage partners and to the UK stakeholders group. As a result, the content template has been revised and it will be discussed and agreed by the Observatory Editorial Advisory Board meeting on the 25th March.

Please see Annex C for the current draft content template.

Trial sample content was received from 4 of the UK stakeholders so as to pilot the template and to inform discussions on future content required.

2.4   Questionnaire/interview to all partners and work undertaken with Observatory sub-contractor

Context

The first phase of scoping the NET Heritage Observatory focussed on two key outcomes:

 a) Identifying the strategic objectives and requirements of the Observatory from the NET Heritage project partners, and;

 b) Identifying and profiling the key audience groups for the Observatory and using these profiles to generate a series of Use Cases (user scenarios) for the service.

In order to identify the strategic objectives and requirements of the project partners, a survey was conducted using a combination of telephone interviews and an online survey questionnaire.

To support this activity, an Observatory sub-contractor was commissioned to develop the technical survey questionnaire and to interview key stakeholders.

A shortlist of all partners and key stakeholders was created to provide at least one named contact in each consortium partner.

Survey Questionnaire

The aim of the survey questionnaire was to capture as a priority the responses of all consortium partners against the following areas:

- Overall strategic objectives for the Observatory
- Key user groups/target audiences
- Outcomes and benefits of the Observatory
- Key success criteria for the service
- Options for future sustainability of the service

Please see Annex D for a full copy of the telephone interview script (and questions comprising the survey questionnaire)

In advance of the telephone interviews, all interviewees were contacted by email with a copy of the text of the questionnaire and a cover letter *(see Annex E).*

The majority of interviews were conducted between the 26th January and the 6th February 2009. Non-respondents were followed up by email and an online version of the questionnaire was also provided for partners who were unable to respond by telephone.

Of a total of 26 interviewees originally identified, a total of 9 were interviewed by telephone, 1 responded via the online questionnaire and 8 responded via email. 8 partners had not responded at the time of creating this report and have been contacted to arrange their responses subsequently.

Transcripts of telephone interviews were created and have been used as the basis of the audience profiles and use cases to be developed in this Work Package.

2.5 Results of questionnaire/interviews, potential users, expectations, future of Observatory etc.

The responses to each section of the survey questionnaire were very valuable, and demonstrated a high degree of consistency. The following list analyses responses against each primary area for investigation:

Overall Strategic Objectives

Most respondents highlighted two 'levels' of outcome/objective for the Observatory:

a) To provide a single point of communication and knowledge sharing for the research community within each participating member state and;
b) To provide a 'bridge' of communication between the research communities in different European member states.

Some respondents indicated a feeling of 'fragmentation' of research-based information across Europe and highlighted the potential for the Observatory to reduce this fragmentation.

Key User Groups/Target Audiences

This part of the survey revealed significant differences of priority, of nomenclature and of structure in the research community of each of the partners.

Different target communities identified by individual respondents included researchers, research laboratories, heritage managers, policymakers and funding agencies.

Most respondents highlighted different 'sub-sections' of several of these communities, particularly in the difference between researchers embedded within heritage institutions and researchers conducting research within an academic setting.

Based on these responses, a revised list of audience groups was created, as follows:

- 'Blue-sky' researchers
- Applied researchers
- Funding agencies
- Independent practitioners (including conservators)
- Institutional managers & professionals (including conservators)
- Policymakers

This list is the focus for discussion with the Observatory Editorial Advisory Board at the meeting in Berlin on the 25th March 2009.

Outcomes/benefits of the Observatory

Interviewees were asked to give a view on the key benefits and outcomes for their organisation as partners in the NET Heritage Observatory.

The main outcome or benefit identified by most respondents was the ability to participate in knowledge exchange across Europe and to identify and learn from best practices in other member states.

A specific benefit was identified by two partners that of being able to use examples of best practice in other member states as a guide to supporting innovative and best practice work in their own research community.

Key Success Criteria for the Service

Interviewees were asked to give a view on the key criteria against which the future success of the Observatory could be judged.

Most respondents indicated that the key criterion was that the Observatory successfully fulfils its potential as a point of international knowledge exchange for the research community.

Several noted that the range of usage of the site (both in terms of visitors and organisations contributing content to the Observatory) were the key indicator of success.

Several pointed out that the Observatory would only succeed if the information it contains is accurate, up-to-date and relevant to its key target audiences. In a related point, one respondent highlighted the fact that the Observatory will only secure long-

term buy-in and support from content contributors if it meets a clearly-defined need for a known audience (in this case, researchers).

A further key criterion was that the Observatory should be successful not only in connecting the research community *within* each member state but also in establishing connections between researchers in different member states.

One respondent also highlighted the fact that the Observatory would be successful if it were able to provide access to the *grey literature* not currently available through other research networks and websites.

In summary, Work Package 2 will deliver the architecture and functionality of the Observatory. Contributions to the Content by all the Work Packages leaders only can ensure that the above success is delivered.

Defining 'Research'

A small number of responses also addressed the issue of the 'scope' of the Observatory, in terms of the academic research disciplines to be addressed. One proposal, based on the scope of the UK Research Councils, provided the following shortlist:

- Arts & Humanities
- Biotechnology & Biological Sciences
- Engineering and Physical Sciences
- Economic & Social Research
- Medicine
- Natural Environment
- Science and Technology

This shortlist is the basis for further discussion by the Observatory Editorial Advisory Board.

2.6   Audience profile; User case scenarios

Audience Profiling is a technique used by in the commercial design, branding and marketing sector. The purpose of profiling audiences is to develop an understanding of the key characteristics and behaviours of a particular target audience or market segment, to inform the development of a Functional Requirements document.

The technique of developing *Use Cases* originates in the technology community, and specifically as part of web development and planning. The purpose of developing a *Use Case* is to describe a scenario for the main activities which a particular audience segment will wish to carry out through the Observatory.

Audience Profiles

There are two primary groups of audiences for the NET Heritage Observatory:

a) Users
b) User/contributors

Users are people who visit the NET Heritage website, either as a one-off visit or as part of a regular behaviour. They are essentially *consumers* of the content offered by the

Observatory, but do not actively contribute to it (either because they do not have content to contribute or because they do not wish to participate).

User/contributors are people who visit the NET Heritage website, both to make use of the information it contains and to contribute their own information.

In terms of the prioritisation of these groups, the following matrix highlights habitual user/contributors as the primary target for the Observatory, with one-off users the least important:

	One-off	Habitual/repeat
Users	4	2
User/contributors	3	1

Profile 1: 'Blue Sky' Researchers

A 'blue sky' researcher is someone who undertakes open-ended and exploratory research, rather than research geared towards answering a specific, well-defined problem.

Typically, a 'blue-sky' researcher will work within a university or other higher

education institution, research institute or research centre. They may work full-time in one specific discipline, or across a range of research activities. They may work part-time, or in conjunction with teaching.

They will usually hold a post-graduate qualification and will have advanced knowledge and skills in data gathering, analysis and management. They will typically demonstrate a good facility with IT and will have experience of collating information from a range of sources and of making a critical judgement about the accuracy, comprehensiveness and relevance of a given resource.

Increasingly, they are experienced in working collaboratively with other researchers both within their home country and with partners in other countries. They will take an active interest in their research discipline, and follow current developments using specific, highly focussed peer-reviewed journals and websites.

There is some tendency among the 'blue sky' research community to make more use of open-ended information and to seek information from more than one academic discipline.

The 'blue sky' researcher is expected to publish the findings of their work in peer-reviewed journals and to seek other opportunities for communicating and disseminating their research. Increasingly, they are accustomed to publishing in an open content framework, or to submitting their research for inclusion in open portals or aggregators.

Profile 2: Applied Researchers

An applied researcher shares many the characteristics of a 'blue-sky' researcher such as undertakings research to an academic standard, and whose work is subject to peer-review.

An applied researcher will typically demonstrate a good facility with IT and will have experience of collating information from a range of sources and of making a critical judgement about the accuracy, comprehensiveness and relevance of a given resource. An applied researcher is capable of defining a problem and carrying out research that leads to solutions to problems.

A key distinction compared to a 'blue sky' researcher is that the work of an applied researcher is more likely to be geared towards answering a specific, well-defined problem and has a defined, measurable outcome.

Key Behaviours for blue sky and applied researchers in the NET Heritage Observatory

'Blue-sky' and applied researchers are the primary target user/contributor audience for

the NET Heritage Observatory.

The key behaviour for both groups is to ensure that the NET Heritage Observatory becomes a primary *destination site* for them, that it is accepted as a useful part of their 'information landscape' and that they make repeated visits both to use the site and to contribute their content.

If the NET Heritage Observatory is to succeed, it must establish an ongoing connection with these groups, to the point where they become active advocates and champions for it to colleagues and students.

In an ideal world, these groups will adopt the Observatory as their own, and form a persistent community of practice around it. Developing such a community, and providing tools and functionality to enable people to participate proactively in it, will be key factors in the overall success of the project.

Key services: Searchable repository, upload/contribute tools, community tools, personalisation

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Profile 3: Funding Agencies

For the purposes of the development of the NET Heritage Observatory, the primary profile for this group is that of a senior manager responsible for establishing the priorities or scope of a significant body of research funding.

Individuals in this category will typically be working in a defined organisational context within the parameters of an established operating procedure. It is likely that they will be working to achieve defined strategic objectives and they will have been tasked with the strategic investment of public (or private) funds in research which contributes to these objectives.

These individuals will tend to have highly-developed analytical skills, and to be experienced in evaluating a range of factors and producing an informed decision. They will typically be seeking to allocate funds to research which constitutes 'best practice' or demonstrates an innovative approach to a particular academic discipline. They will typically be working in an environment with established targets and are likely to be involved in networks of colleagues or related organisations.

These individuals will usually be educated to degree-level or higher and are likely to have significant experience in their sector. They will usually have a reasonable degree of IT-literacy (as consumers rather than creators of online services) and will be experienced in assembling and critically assessing information from a wide range of sources. They are likely to have an established framework of 'trusted' sources of information about current developments.

These users are likely to be time-poor, and to depend on 'push' services (RSS, email updates) to receive regularly updated information

Key Behaviours in the NET Heritage Observatory

Key stakeholders in Funding Agencies are likely to be ad-hoc or infrequent users of the NET Heritage Observatory. They are likely to refer to it when developing funding programmes or assessing research proposals for funding, and are unlikely to have content which they would contribute directly to it.

A key success factor for the Observatory will be in ensuring that this community are aware of the applicability of the Observatory content to their work and that they proactively promote it as an information resource for colleagues in the same community.

Key services: Email/RSS 'push' updates, magazine/editorial content, highlighted research programmes

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Profile 4: Independent Practitioners

Independent practitioners are people who work with the heritage sector in a professional capacity, but who are not directly associated with a particular organisation, or are not directly part of an organisational hierarchy. This group includes, for example, contractors, consultants or freelance conservators.

Independent practitioners may be either sole-traders or part of a small/medium size enterprise. They are likely either to be accredited, certified, chartered, licensed, warranted or otherwise academically qualified in their specific discipline. They will usually have some experience of working in the heritage sector.

They will work with a range of client institutions and may specialise either in a specific type of material or collection or in a particular professional discipline.

Independent practitioners will cover a broad demographic, and will include a range of levels of IT-literacy. They are likely to depend on a range of 'trusted' information sources including the sector and trade press and to be adept at resource-discovery and analysis.

Key Behaviours in the NET Heritage Observatory

The primary behaviours for this group in the NET Heritage Observatory are to maintain their professional knowledge, to participate in networks relating to their discipline or specialism and to find out about current development and best practices in the heritage sector.

Independent Practitioners are more likely to be users than user/practitioners, although they may be a valuable source of knowledge about grey literature and unpublished research findings generated in client organisations and projects.

Key services: Magazine/editorial content, highlighted research programmes

Profile 5: Institutional Managers and Professionals (including Conservators)

Institutional managers and professionals are people working in a defined organisational context, as part of an organisational hierarchy, in an organisation which is responsible for the protection, conservation, management, interpretation and presentation of heritage assets for public access.

These individuals tend to span a range of demographics. They are generally educated to degree-level or higher and will have a variable degree of IT-literacy. If working directly in the protection or conservation of collections or buildings, they are likely to have an academic qualification in a related discipline (such as chemistry, materials science or engineering) and/or to have received advanced training as part of their professional development. They may also be accredited, certified, chartered, licensed or warranted.

They will usually participate in one or more professional networks, and will depend on the professional press as a primary source of information about current developments and best practices. There is a likelihood that they will possess some degree of spoken English, but may not be accustomed to consuming sector or technical information other than in their first language (where this is not English).

Key Behaviours in the NET Heritage Observatory

Managers and professionals will characteristically tend to be users rather than user/contributors, although professionals working directly in a conservation/collections care capacity may from time to time communicate the results of specific research or scientific/exploratory investigation of their collection or site.

Managers and professionals will typically make use of search engines as a primary research tool and are likely to depend on a range of trusted information sources to keep them up-to-date with current best practices.

Key services: Magazine/editorial content, highlighted research programmes

Profile 6: Policymakers

Policymakers will typically be senior sector figures with a significant influence over the formation of policy in the heritage or academic/research sectors.

These users will have a range of backgrounds from an academic research background to being highly educated and having significant experience in a professional capacity. All backgrounds will typically depend on mediated information provided by a network of advisers and trusted sources.

In influencing policy, they will characteristically use a range of communications and networking skills, and they are likely to calibrate their own views with briefings from trusted sources in support of their arguments. They will usually have advanced analytical skills.

Policymakers will have a reasonable degree of fluency in English but may not be accustomed to consuming sector or technical information other than in their first

language (where English is not their first language).

Key Behaviours in the NET Heritage Observatory

Policymakers will typically be infrequent or ad-hoc users of the NET Heritage Observatory (if they use it at all), and when they do, it will be to gain simple access either to narrative/overview content relating to a specific discipline or to examples of best current practices in other countries.

Policymakers are likely to require prompting to visit the Observatory or, more likely, for those who advise them.

Key services: Email/RSS 'push' services, magazine/editorial content, highlighted research programmes

Audiences ruled out of scope

For the purposes of this development phase of the NET Heritage Observatory, the following audience groups have been ruled out of scope as specific targets:

- General public
- Informal/private researchers
- Students

3.   Functional Specification

A copy of the draft Functional Specification, from which the design brief for the development of the Observatory will be produced, has been created by the Observatory Sub-contractor in consultation with the Project Manager and the AHRC/EPSRC Science and Heritage Programme Director. *See Annex F*

4.   Links to other WPs

The Project Manager has begun email correspondence with all other Partners and all were consulted on the Observatory questionnaire. Furthermore, the set up of the Editorial Advisory Board will ensure that all work packages are represented when decisions are made on the future of the Observatory.

In particular, correspondence has begun with Work Package 1 leaders. Following consultation, a decision was jointly made on the word definitions to be used within the WP1 questionnaire.

5.   Conclusions

In conclusion, the scope and aims laid out in task 2.1 of the Description of Work have been fulfilled. The appointment of a full time project manager; the AHRC/EPSRC Programme Director for Science and Heritage as project advisor and member of the Executive Board; and the Observatory sub-contractor, has ensured the successful progress of Work Package 2 and the start of the development of the Observatory.

The Observatory Editorial Advisory Board has been selected from among the NET Heritage partners and includes two external members. Invitation letters and Terms of Reference have been accepted and the first meeting will take place on the 25th March. Agreements have been signed under the Terms of Reference for the Editorial Advisory Board for provision of sample content by each partner representing their Work Package.

Based on the success of the Observatory questionnaire, the functional specification has been completed and will form the basis of the design and implementation of the Observatory. The second contractors' meeting in Berlin will enable all partners to be consulted fully on the next steps for the Observatory.

Address

Date

Dear

Invitation

Membership of the NET Heritage Observatory Editorial Advisory Board

Following a decision by the NET Heritage Executive Board, I am pleased to invite you to serve on the Observatory Editorial Advisory Board to be set up as part of the NET Heritage project Work Package 2: European NET-HERITAGE observatory on cultural heritage research exchange of information.

NET Heritage is the first significant initiative attempting to coordinate national RTD programmes of European countries in the field of research applied to the Protection for Tangible Cultural Heritage. Launched on the 6th October 2008, this project will be 3 years in duration and has a completion date of 31st September 2011. It brings together 14 European partner countries.

The UK partner is responsible for the creation of an Observatory or web portal to disseminate contributions from European and national programmes; results and outcomes of heritage research; news on research issues and views and information regarding heritage science, to end-users, both expert and non-expert.

The Observatory Editorial Board is being set up in order to monitor content for the web portal. The Board is made up of work package leaders of the NET Heritage project and two key external members. The Board will:

- Provide or facilitate the provision of content to the Observatory

- Add value through peer review of all content

- Monitor the quality and relevance of information

- Evaluate the need for multi-linguality

Please find attached in Annex A, the Terms of Reference for the Board.

Your appointment would begin 1st December 2008 and run for a term of 33 months until September 2011. The Work package leaders on the Board are expected to cover their own expenses while the external appointees will have travel and accommodation covered by AHRC. If you decide to accept this invitation, please sign and return the attached copy of the 'Terms of Reference' document Annex A, keeping a copy for your records.

The first meeting of the Observatory Editorial Board will take place in Berlin on the morning of Wednesday 25th March 2009 – location details to be confirmed.

Yours sincerely

Polly Haywood

Encs: Terms of Reference

OBSERVATORY EDITORIAL BOARD

Terms of Reference

Purpose of the Board:

- **Provide and to facilitate provision of content to the Observatory**: members who are Work Package leaders to supply both sample content and content from their specific work packages for uploading to the web. External members to facilitate the provision of key information to fill the gaps that the Net-Heritage work packages is unable to provide.

- **Add value through peer review of all content**: some content may not have undergone a peer review process, others may already have. Review will focus on the quality as well as the consistency and appropriateness of the content to the Observatory's different users. Peer review is a Board function rather than a process.

- **Monitor the quality and relevance of information:** as before and in particular the relevance, type and formats of information to be included in the Observatory

- **Evaluate the need for multi-linguality:** following receipt of sample content and user testing of the site, an evaluation will be made by the Board on whether the Observatory should be multilingual.

Meeting arrangements

Meetings will take place every 6 months, coinciding with project meetings. The meetings will be serviced and arranged by AHRC.

Membership

Membership is made up of work package leaders of NET Heritage and two key external members.

Role of the Chair

The Chair (Work Package Leader 2 or a nominated representative) has particular responsibility for:

- ensuring that the Board meets regularly (coinciding with the Contractor Board and Executive Board Meetings), that minutes record the views of the members and

recommendations and actions following the meeting; reporting to the Contractor Board and the Executive Board Meetings on the Editorial Board's recommendations

- ensuring that all members are aware of the terms and conditions of the Board

Expenses

The Work package leaders on the Board will cover their own expenses. External members will have travel and accommodation covered by AHRC.

Signed ……………………………………………………………………

Date ……………………………………………

Observatory Editorial Advisory Board Membership

Members have now all been officially appointed with a representative from each work package, a chair, 2 external representatives and the sub-contractor on WP2

Chair – Professor Shearer West (AHRC Director of Research)

WP1 – Ivon Marazov (Bulgaria)

WP2 – Professor May Cassar, Nick Poole (sub-contractor), Polly Haywood (UK)

WP3 – Professor Cristina Sabbioni (MIUR, Italy)

WP4 – Sybil Klein (Germany)

WP5 – Barbara Swiatkowska (Poland)

WP6 – Patrizia Bianconi (MiBAC, Italy)

External Representatives - Professor Peter Brimblecombe (Atmospheric Environment), Dr Philip Campbell (Nature)

OBSERVATORY EDITORIAL ADVISORY BOARD AGENDA

25th March 2009

Fraunhofer-Forum Berlin, Anna-Louisa-Karsch-Straße 2, 10178 Berlin

Papers for the Observatory Editorial Advisory Board

Annex A – Terms of Reference for the Editorial Advisory Board (For Information)

Annex B – A paper on the draft content template for discussion

Annex C – Minutes from the informal UK Advisory Board meeting

Annex D – A paper on the role of the Editor as suggested by Dr Philip Campbell

9.30 – 9.45	Welcome (Chair, AHRC)
	Confirmation of Observatory Editorial Advisory Board terms of reference – see Annex A (AHRC)
9.45 – 10.45	Discussion of draft Content Template – see Annex B (All, led by Nick Poole)
	Issues to consider:
	What will the scope of the Observatory be?
	Who are our users?
	How can we motivate users to contribute?
	Sustainability of the Observatory
10.45 -11.00	Coffee break
11.00 – 11.30	Grey literature – how do we define and identify important grey literature – see Annex C (All, led by Professor Peter Brimblecombe)
	Conclusions on content template - proposed changes (All)

11.30 – 11.45   Discussion on the branding and marketing of the Observatory (All, led by Nick Poole)

11.45 – 12.15   Discussion of Paper on the Role of the Observatory Editor – see Annex D (All, led by Dr Philip Campbell)

12.15 – 13.00   Discussion and conclusions

Agree mode of working for Observatory Editorial Board

Agree date of next informal and formal meetings

This template has been adapted from the original following an email exchange with all members of the Observatory Editorial Board. This is the proposed template for discussion at the meeting in March:

Sample Content Template

Submitter Information

Name: ………………………………………………………………………….

Organisation Name: ………………………………………………………….

Country: ………………………………………………………………………..

Contact Address: ……………………………………………………………..

……………………………………………………………..

……………………………………………………………..

……………………………………………………………..

……………………………………………………………..

Phone: ………………………………………………………….

Email: ……………………………………………………….

Website: ……………………………………………………….

Original Author information

Original Author of content: …………………………………………………………………….

Permission to use content already agreed?

Tick which of the following best describes your content and include the format in which it is being sent:

☐ **News article** eg. a summary and link to an article in the press on up and coming research

☐ **Feature -** a piece of journalistic writing that covers a selected issue in-depth

☐ **Research -** Research paper, projects etc

☐ **Event** eg a workshop, conference, meeting taking place (for training courses, see training form)

☐ **Expert/Technical Guide**

☐ **Training Form –** information on training courses with forms to sign up to the course; factsheets on training courses etc

☐ **Dataset** eg climate maps in number format

☐ **Conference Presentation** eg. PowerPoint presentations from workshops and conferences

☐ **Calls for proposals** – information on calls and schemes within funding councils

☐ **Job Vacancies**

☐ **Other (Please Specify)**

If your content is an article, feature or research paper, is it a summary of a longer article found elsewhere?

If Yes, what is the name of the website containing the full article and what is the URL link to the site?

Please attach any images separately and clearly state the copyright credit for those images (if applicable)

Please provide your content in the following format where appropriate:

Title – Max 10 word title/header. It must clearly indicate what can be found in the content. The title will act as a hyperlink to the full information.

Summary of content

Approximately 25 word front page summary on the content that you are submitting.

This should be fairly short and concise to draw readers in. Ensure that readers are clear from the summary whether there will be something of interest for them if they click further.

Content (the Title will link to this content page) **–** the length of this will depend on the type of content being submitted.

If it is a summary of a longer article, feature or research paper or project referenced elsewhere, keep to around 200 words. Please state at the end where the full article can be found including the URL.

If this is a news article or new feature (with no links to other sites), it may be longer – as a guide between 500-1000 words.

If it is an event, give details of the event, dates, a link to further information, registration if required, contact details of an event organiser etc.

Technical/expert guides, training forms, datasets etc may be in the form of a PDF, word or excel document available for download (Ideally max 5MB). A title and some brief content should summarise what the reader can expect from the document.

Conference papers may be submitted in the form of PowerPoint presentations available for download. A title (explaining what the presentation is about) and some brief content should summarise what the reader can expect from the document.

Calls for proposals and job vacancies must give full details with a link to further information where possible.

The copyright of all material used on the portal will remain the property of the author of the item published.

STAKEHOLDER QUESTIONNAIRE

About this document: This questionnaire will be used as the basis of a series of interviews with strategic stakeholders across Europe in the NET Heritage Observatory. The purpose of these interviews is to capture the strategic objectives, expectations, requirements and dependencies of the different Observatory stakeholders, as well as the expectations in terms of users of the resulting service.

Methodology: All stakeholders will be contacted by email with a covering note and a summary of the key points for discussion and asked to agree a time for a telephone interviews. Telephone interviews will be carried out by the Observatory Subcontractor, and the resulting comments used as the basis of a statement of the Strategic Objectives of the NET Heritage Observatory.

Introduction: Many thanks for agreeing to be interviewed as a stakeholder in the NET Heritage Observatory. The interview will last between 10-15 minutes, and I'll be taking notes of your responses.

The information you provide will be used by the WP2 leader (AHRC) as part of their work for this work package. It is held in confidence by the WP2 leader and will not be shared with any other 3rd party outside of the NET Heritage consortium. All results will be anonymised unless you expressly request that they are credited to you.

The purpose of the interview is to make sure that we capture your needs and expectations from the NET Heritage observatory, and that these inform how it is to be implemented. Do you have any questions or points of clarification before we begin?

Strategic objective: The first question relates to the overall purpose of the NET Heritage Observatory. What problem is NET Heritage Observatory going to solve? Why is this important?

Users: Who, from your point of view, are the most important potential users of the NET Heritage Observatory? Why?

Outcomes: What do you regard as the main benefits for your organisation of being involved in the NET Heritage Observatory?

Success criteria: What does the Observatory need to achieve in order for you to consider it a success?

Sustainability: Describe how you imagine the NET Heritage Observatory might operate in 4 years time.

General: That's the end of my questions. Are there any other points, expectations or comments you'd like to make sure that I include in this start-up phase?

Conclusion: Many thanks for your responses. I'll be speaking to the other stakeholders in the Observatory over the next two weeks, and I'll be reporting back to the WP2 leader shortly.

The next step will be to identify the key user profiles for the Observatory and develop a series of Use Cases. May I contact you again for further comments once these are available?

NET HERITAGE SURVEY COVERING LETTER

By email

FAO: NET Heritage Observatory Project Contact

Dear Colleague,

NET HERITAGE OBSERVATORY STAKEHOLDER SURVEY

I am writing to you as a key Stakeholder in the NET Heritage project to introduce myself, and to ask you to participate in a Stakeholder Survey as part of the development of Work Package 2 of the project.

My name is Nick Poole. I have been asked by the Arts & Humanities Research Council (AHRC) to support the scoping and development of the NET Heritage Observatory which will provide a focus for much of the work of the project.

In order to ensure that the Observatory meets the objectives of the NET Heritage project, we are inviting all strategic stakeholders to participate in a short telephone interview. I am attaching a Questionnaire which sets out the main areas for discussion in the interview.

The aim of the interview is to capture information about your needs and expectations from the Observatory. It specifically addresses the following areas:

- The Strategic purpose of the Observatory

- The proposed users for the Observatory

- Success criteria for Work Package 2

- The medium to long-term model for sustaining the Observatory

I would be grateful if you would email me at nick@collectionstrust.org.uknick to confirm your availability for a telephone interview on either the 30th January or the 5th and 6th of February.

Please could you also provide me with a telephone contact number for you and any extension which I will need in order to reach you. If you need to call me, or require any additional information about this scoping project, please either email me at the above address or contact me on 0044 (0)7764 677459.

Yours sincerely, and with many thanks in anticipation of your participation.

Nick Poole

Project Consultant

NET Heritage Observatory

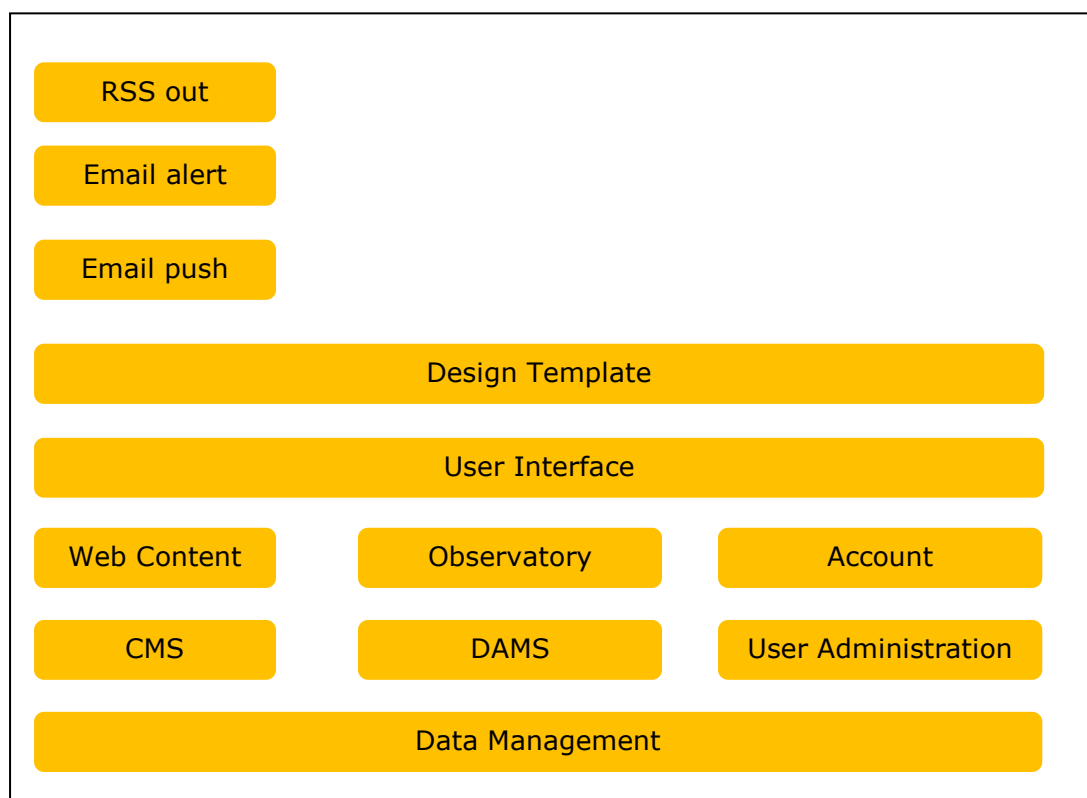# NET Heritage Observatory Functional Specification

This document has been produced for the purpose of specifying the Observatory portal. It will form the basis for its technical development.

The Arts & Humanities Research Council (AHRC) is responsible for the scoping and implementation of Work Package 2: the development of a NET Heritage Observatory.

The primary deliverable for this Work Package is a functional web publishing platform, incorporating a digital asset repository (the 'Observatory'), interfaces and systems for content, data and user administration.

Overview of the web portal as a service

1. The proposed online service is intended to support the workflows and functionality as set out in the *Use Cases*.

2. The proposed technical solution will be stable, scalable and cost-effective.

3. Full standards compliance will be provided. Details of minimum requirements are provided in Section 6 of this Functional Specification.

4. Accessibility for the widest possible audience will be delivered including conformance to the requirements of the W3C Web Accessibility Initiative and Publicly Available Specification 78.

RSS out

Email alert

Email push

Design Template

User Interface

Web Content	Observatory	Account
CMS	DAMS	User Administration

Data Management

Overview of requirements

5. The table (below) sets out the overview of the functional requirements for the NET Heritage Observatory:

Front-end Systems

- Design template

- Website content

- Database of Research (Observatory)

- User registration/account management

    - Create/manage profile

    - Set Preferences

    - Email Alerts

    - Upload my Research

Back-end Systems

- Site management

- Content/page management

- User Administration

- Observatory/database management

- Web statistics

- Terminology Control

6. The web portal will be launched from month 35 of the Net-Heritage project (August 2011)

7. At a minimum, the **Content Management System** should support the following features:

- A modular/extensible structure

- Data stored in a non-proprietary, migratable format (preferably XML)

- The underlying data management system/database should be a standard, non-proprietary system that is free of licensing cost (preferably MySQL or similar)

- Browser-based administration, including creation of content and user administration

- Template-based (Cascading Style Sheet) layout/design capable of supporting multiple templates

- Metadata management, including administration of controlled terminologies

- User/editor logging and reporting

- User/session information and statistical reporting

- Simple Content Management environment which supports online editing by non-specialist/technical staff

8. The **search/browse requirements** will be implemented through the following methodologies:

- Sitewide keyword search

- Section or subsite-specific keyword search

- Combined/advanced search

- Boolean search strings

- Thematic browse

Overview of additional functional requirements of Observatory

9. In addition to the functions described above, the technical solution will provide/support the specific Observatory functionality as set out in the *Use Cases.*

Site architecture

10. The web portal will be intuitive and easy to use. The architecture of the site has therefore been kept as flat as possible, and is based on the general principles that:

- No section should be more than 2 layers deep

- Navigational elements should be consistent throughout the site

- It should be possible to navigate from any point within the site to any other point using the navigation

- The information architecture should be user-focussed

- Nothing in the implementation of the navigation should break the continuity of the context for the user
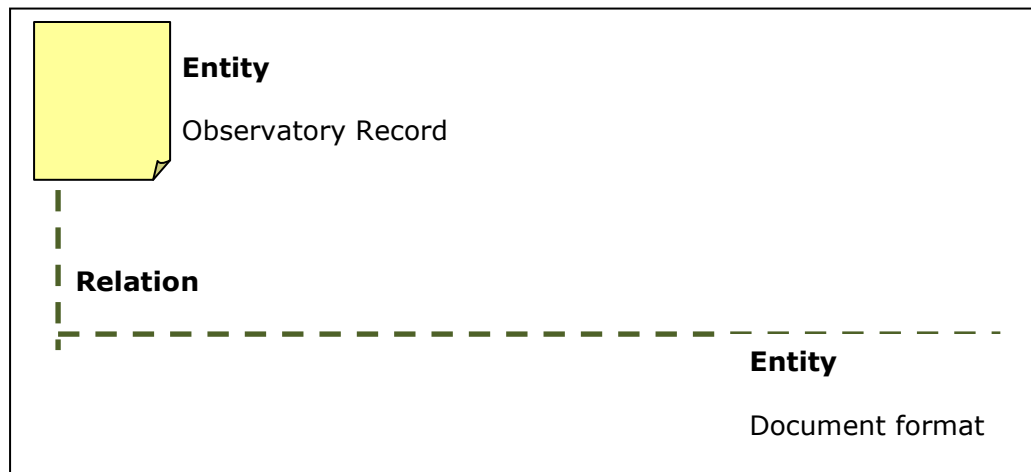
Summary project phases

11. A full project plan and schedule have been provided as part of the Description of Work for Work Package 2.

Web standards

12. Accessible and usable online services will be delivered that conform to current best practice in web standards.

13. All web functionality and presentation will conform to the standards set out below. Compliance will be embedded in the prototyping and delivery of the final product through appropriate Quality Control methodologies.

14. Testing and validation for compliance will be demonstrated using the tools cited below.

15. As a general principle, the client-side footprint for the service will be kept to an absolute minimum for both content access and editing. Because of the need for distributed editorship for the service, client-side installation for back-end functionality/management will be avoided.

16. The minimum requirements for **Web Standards** are:

    - All client/browser side content will be presented in valid XHTML 1.0 Transitional, irrespective of the server side/scripting language used.

    - Compliance with the relevant XHTML standard must be validated using the W3C Validator tool at http://validator.w3.org] and the site pages should include the 'Valid XHTML 1.0 Strict/Transitional' logo button.

    - All layout and presentation, including structural and design elements will be controlled through a relative linked style sheet (ie. without the use of inline styles). Wherever possible, positioning will be relative rather than absolute, and presentation will be sufficiently liquid to support reflowing across different form factors.

    - Where relevant, additional relative style sheets will be provided for both print layout and small form factor/mobile platforms.

    - All style sheets will conform to the CSS Level 2 standard.

    - Compliance with the CSS Level 2 standard will be validated using the CSS Validator tool at http://jigsaw.w3.org/css-validator/ and the site pages will include the 'CSS2' logo button.

    - All web functions and pages will be built with reference to the Web Content Accessibility Guidelines 1.0 and the Publicly Available Specification 78 for websites.

- Specifically, all site pages are expected to meet conformance level 'AA', satisfying all Priority 1 and 2 checkpoints.

- In addition, content of the Observatory will be expected to conform to the IEEE Learning Object Model (IEEE LOM) data model.

Style and design

17. Wherever possible, site design will avoid the use of hard-coded page elements for the definition of visual elements, including typography and layout.

18. Site layout will be based on relative positioning defined within an external, linked style sheet. Specific areas of functionality, in particular integration with a Content Management System will support externally-defined layout.

19. As a matter of good practice, the design of the site will incorporate as few template styles as possible, and every effort will be made to preserve consistent navigation throughout the site.

Metadata

20. Individual pages and assets within the site will need to be associated with descriptive metadata. This metadata will be based on the Dublin Core simple element set (http://www.dublincore.org), and editors/contributors will be required to create metadata records at the point of content creation.

21. For each document, page or asset, the following information will need to be provided as a minimum:

- Title

- Description

- Subject

- Creator (author)

- Publisher

- Date (uploaded to system)

- Date (published)

- Date (delete from system)

- Format

- Language

- Rights

Web content

22. The content for the site will take the form of a number of web pages linking to electronic documents/assets. All content creation and uploading will be managed through a browser-accessible back-end management system.

23. Each asset (and web page) will need to be associated with descriptive metadata (see section above) at the point of creation.

24. The Content Management System will support workflow management, and in particular the use of nested permissions to define different layers of editorial and administrative control (see User Authentication and Management below).

25. Created documents from different authors should be capable of being 'staged' pending editing and publication.

26. It should be possible to associate individual documents or assets with a number of different web pages. In other words, many pages may refer or link to the same electronic document, and hence assets will be held centrally or separately from page content.

Documents/Assets

27. The web site or service includes a requirement to publish factsheets, guidelines, publications, reports, datasets, images and other information in the form of electronic assets or documents.

28. It is essential that each asset is associated with metadata which supports its long-term management and re-use.

29. Document/asset types include:

 - Acrobat PDF files

 - Word files

 - Excel files

 - Text files

 - GIF/JPG images

 - MPEG/AVI video

 - Audio files

 - Zip files

30. Assets will need to be uploaded into the Content Management System via a simple browse/upload interface. Users will be required to provide relevant metadata at the point of upload into the system.

31. The system will be expected to support batch uploading and management of assets.

URL

32. The URL www.heritageportal.eu has currently been secured for the Observatory, although it is possible to change this if this is necessary for branding purposes.

33. Responsibility for the registration of the URL rests with the WP 2 leader, the AHRC.

34. An absolute requirement of the Content Management System and the resulting pages is that they should support deep-linking through persistent natural-language URLs based on a common root.

35. For ease of linking, it is preferable to maintain URLs of the form http://root/simplename.htm

36. Where the raw output of the CMS take the form of a database, query, script or other form of string, it is essential to map these to natural-language URLs which refer to the content of the relevant page (for example using the MOD Rewrite Function).

37. Wherever possible, the architecture of the site will avoid the use of directories. However, where directories are necessary, they will use consistent naming conventions with the different sections of the site.

Web hosting

38. The 3 year hosting of the Observatory will be arranged by the WP2 Leader.

User authentication and management

39. User/session logging and tracking will form an essential part of the ongoing sustainability of the service. All users will be required to register as users of the service (though registration will be unmoderated). Registration will form the basis of user tracking, as well as any relevant content/display preferences.

40. User authentication will be based on registration/ID as opposed to browser/session cookies. Authentication will be server-side.

41. At the point of registration, the user will be asked to provide the following:

- Name (* required)

- Email address (* required)

- Job title

- Organisation

- Uploaded avatar

42. User registration will include the usual functionality including password reminders and online updating of password and preferences.

43. As previously stated, the Content Management System will be expected to support a number of 'layers' of nested authorities. The final list of these will be agreed with the supplier, but it will be expected to include:

- General user (read permissions, no back-end access)

- Contributor (read/write access)

- Editor (read/write/edit/delete)

- Administrator (all, plus user administration)

- Super-admin (all, plus site structure, db management etc)

Statistics

44. The WP2 leader will require the provision of detailed statistics relating to usage of the site. These will include:

- Page impressions

- Unique visitors

- Returning visitors

- Visitor path

- Visit duration

- IP address

- Country of origin

45. Monitoring of statistics will be by:

- Cookie-based session tracking

- Other session tracking (eg. URL string)

- Embedded 3rd party tracking service

- Log file analysis

46. Log file analysis will be conducted using Google Analytics. This software will be licensed to the WP2 leader, the AHRC.

RSS and content syndication

47. The WP2 leader, the AHRC requires the disclosure of site/service content through RSS syndication.

48. Where a syndicated service is provided, compliance with the relevant technical specification will be ensured.