

An evaluation of the JORUM Set Up and Launch Project

Executive Summary

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Background

JORUM (<http://www.jorum.ac.uk/>) will be a free online repository service for teaching and support staff in UK Further and Higher Education Institutions, helping to build a community for sharing, reuse and repurposing of learning and teaching materials. The JORUM Set Up and Launch project was funded to develop and launch the JORUM service to the higher education and further education community in the UK.

The evaluation was conducted by evidence base research and evaluation at the University of Central England during August and September 2005. It reported on the JORUM Set Up and Launch project as it reached the end of its duration. Four factors were assessed as part of the evaluation:

- the progress of the project
- the extent to which end-user needs were being met
- whether the JORUM service is likely to be taken up by institutions
- whether projects and institutions are interested in depositing in JORUM.

Initially the JORUM Team provided a list of possible stakeholders to contact. This was supplemented with suggestions from other participants in the evaluation and the evaluation team themselves. The methods employed consisted of:

- detailed document analysis
- a visit to the JORUM team
- face to face interviews with JORUM team members
- telephone interviews with a range of stakeholders (using an open ended set of themes relevant to each particular stakeholder).

Main findings

The evaluation found that the objectives of the JORUM project had been clear although the work underlying some of these objectives involved a fair degree of complexity and although work had progressed well on all the objectives, the overall aim of the project has not been met. The main reason for this centred around delays in the delivery of systems and software. Overall, the project seems to have been managed extremely well. It must be remembered that this the work undertaken by the JORUM team is cutting edge and the scale and complexity of this project have been extremely challenging; all work to date needs to be considered within the context of this. At this point it seems there is little impact of missing the stated launch date, however, this is something which obviously needs to be addressed as a priority.

The delayed launch of the JORUM service has made it more difficult than was originally envisaged to provide clear answers to the other three factors to consider as part of this evaluation and it should be noted that the main findings in these areas are based on a small sample of pre-launch users, supported by general knowledge of the community and feedback through JORUM promotional events and supplemented through opinions of other stakeholders.

It would appear that the JORUM team is engaging with its pre-launch end users well and taking on board comments to ensure that end user needs are being met; the majority of end users interviewed were happy with the level of support they had received and extremely positive about the future possibilities of JORUM. Some feedback on stakeholders' opinions on possible barriers to use of JORUM were provided, for example, institutional attitudes towards licensing; the importance of

effective promotion; and ensuring enough good quality materials are in JORUM to encourage its use.

Achievements

The project has been well managed; the climate within the JORUM team is one of openness, clarity, professionalism and flexibility. The project has been well documented; communication has generally been good; and any unforeseen developments quickly adapted to. Despite being spread between two data centres, the project team appears to work extremely well together.

One of the key achievements of the JORUM Set-up and Launch Project has been the development of a suitable licence for JORUM in light of the emerging constraints and the external environment. Despite being less ambitious than was originally envisaged, it is still a major achievement to have developed a single licensing agreement which can provide the basis for the launch of a large scale repository which is full-text and includes content, including third party content. Obtaining a number of signed licences from HE and FE institutions has been an achievement.

The collaborative partnerships which have been developed between the JORUM team and other bodies in the sector are significant achievements which can be built on in the future. Securing the backing of the HEA is an important achievement, but this relationship needs to be carefully handled, as there are some areas of doubt over JORUM's applicability in the longer term with regard to open access.

The development of a suitable metadata workflow model to suit the needs of the project at this point is another achievement. This is important not only in its own right but also in that it has led to the development of a good working relationship with the RDN.

A less tangible achievement of the project has been in awareness-raising and stimulating debate about the issues surrounding repositories, for example, copyright and licensing.

Lessons learnt

The JORUM team has learned a lot about working with third parties, in particular in relation to the software development, and dealing with a small vendor in a different capacity has meant some learning with regard to negotiating vendor-client relationships.

JORUM has generated significant learning about complex area of repositories which will be beneficial for the whole community.

There has been learning with regard to some aspects of project management, in particular, the value of a steering group for this type of project and perhaps the need to build in more contingency time in a project of this complexity and scale.

Recommendations

The recommendations emerging from this evaluation relate to specific issues for the JORUM team in future development of the JORUM Service, and JISC. It is acknowledged that as the JORUM develops further, some of these points may already be being addressed by the JORUM Service-in Development Project and the JORUM Research and Development Project.

Recommendations for JORUM

Recommendation 1

The JORUM team should aim to launch the contributor and the user JORUM Service as soon as possible. However a robust and well tested system for the service needs to be in place prior to launch and immediate efforts should be devoted to this. It is important that stakeholders' interest and perceptions continue to be well managed and that when a date for launch is announced it is adhered to. Information about a proposed launch date should be clearly communicated to all stakeholders as soon as possible to enable this to build it into their planning cycles.

Recommendation 2

The promotional strategy for JORUM should be developed further and will be a vital part of the next stages of development post launch of the service. Efforts should be made to draw on the expertise and background of the Steering Group members in developing the strategy. The full responsibility for this should not rest with the JORUM team alone; dissemination and promotion should be conducted in the most effective way possible, for example, drawing on the existing networks of the HEA and RSCs and other areas of JISC. Whilst the development of a 'critical mass' of material is an important long term aspiration for JORUM this may take some time to build. JORUM may wish to consider developing a targeted strategy in the first instance and possibly offering incentives to contribute for a limited period.

Recommendation 3

The JORUM team should take steps to ensure that the expectations of both the JORUM team, the vendor and JISC are spelt out clearly at all stages and adequately understood by all parties. Clear understanding is needed between all parties on the criteria for, and responsibility for, testing of each system release. Before further development is undertaken the vendor and the JORUM Managers should meet to review the contract and ensure that the working arrangements are formalised and the client /vendor relationship and expectations are made clear and understood.

Recommendation 4

The JORUM team, in conjunction with JISC, should ensure that relationships with key stakeholders who could be valuable in the promotion and take-up of JORUM, such as the HEA and the RSCs, continue to be carefully managed. A regular dialogue needs to be maintained in order to regularly provide clarity on current constraints and where possible explore new optional features.

Recommendation 5

The JORUM team should continue to develop the relationship with the Steering Group and draw on their expertise and contacts as the JORUM service develops.

Recommendation 6

As a unique developing service, the JORUM team should ensure after the launch that feedback from users is effectively captured. Similarly the JORUM Team need to constantly review the effectiveness of the metadata service model developed with the RDN and support requirements for users and contributors as demand for the service is known.

Recommendation 7

The sharing of roles between the two data centres offers some flexibility to deal with changing circumstances. The JORUM Team should make clear to relevant stakeholders how the roles between the two data centres are allocated over time.

Recommendation 8

The JORUM Team should seek to capture the lesson learned over the Set Up and Launch year and share them for the benefit of the wider community. This might be achieved through a summative research paper or through a more comprehensive approach (see Recommendation 13)

Recommendation 9

Through links with the JORUM Research and Development project, the JORUM team should keep up to date with developments which may result in gradual revisions to the JORUM service. The JORUM Team, however, must be mindful to keep a clear distinction between the service delivery and the related research and development activities.

Recommendations for JISC

Recommendation 10

As far as is possible, JISC needs to consider how links might be developed between JORUM and other repositories at a local' subject, regional or international level. Information on this should be clearly communicated to stakeholders including potential users.

Recommendation 11

Dissemination and promotion of JORUM requires a dual approach: bottom up and 'top-down'. JISC should ensure that it continues to be engaged in persuading institutions to buy into the service and consider whether It could be a compulsory requirement of funding for JISC funded projects which produce suitable resources to deposit their material in JORUM. JORUM needs to be firmly placed on the wider JISC agenda to ensure it reaches as many people as possible.

Recommendation 12

JISC should consider providing guidance for JISC funded projects in the procurement of software and contracts with external vendors. This could include standard clauses and best practice guidelines.

Recommendation 13

For many, including JISC, working with a third party vendor in the way the JORUM Set Up and Launch project has done, has been a new experience and one in which has entailed considerable learning. Drawing on the experience to date, building an element of contingency timing in future project plans for the development of the JORUM system where activities are complex and involve third party vendors should be considered.

Recommendation 14

JISC should, as soon as possible, aim to make explicit and clear the longer term aspirations for JORUM. Although it is acknowledged that this is difficult to do, some areas of ambiguity still exist around whether JORUM will be a free or fee-paying service in the long term; the current uncertainty has potential to be off-putting for some potential depositors and stakeholders.

Recommendation 15

The JORUM Set-up and Launch project has generated a great deal of learning that could be of use outside the core work of the project. Although this should not detract from the focus on the tasks in hand in launching and supporting the JORUM service, work should be undertaken to capture and present this knowledge in a way that is accessible to the wider community. In this respect JISC may consider providing additional funding to support this element.

Recommendation 16

One of the perceived barriers to sharing learning resources is that the culture of sharing in particular in HE is not well developed. JISC, in collaboration with other organisations such as the HEA, needs to continue to be a strong advocate to promote a culture of sharing. JISC should consider funding a study to explore some of the cultural barriers to the sharing of resources and use the results of this work to inform the JORUM promotion strategy over the medium and longer term.

Recommendation 17

JISC should work to implement a system of digital signatures which can be applied to the signing of the JORUM licence to facilitate ease of signing.