Bamboo Implementation Proposal - Preview

David A. Greenbaum, University of California, Berkeley
Chad J. Kainz, University of Chicago

January 12, 2009

Topics we will cover about the Implementation Proposal

1. Context: A reminder of our major goals and our community design principles

2. Scope of the Bamboo Implementation Project and Bamboo Consortium

3. Major areas of the Phase 1 Implementation Proposal

4. How these areas are informed by work carried out so far

5. The relationship of Bamboo to other key initiatives ... an ecosystem

6. Funding, the current financial climate, and the value of working together

7. The relationship of the Implementation Proposal to the Consortial Model

   [Then A Deeper Dive Tomorrow, Day 2:](#)

8. Proposal outline

9. Early ideas on how we will develop the proposal through Fall 2009

10. A deeper dive into Phase 1 Implementation Proposal areas

projectbamboo.org

1A. Bamboo is *currently* a Planning Project

- Spans 18 months from April 2008 - September 2009

- Goal of building a consortium of universities, colleges, and other organizations who will work together to advance arts and humanities teaching and research through the development of shared technology services

- Participating institutions and organizations will help to define the final scope of Bamboo, and formulate a set of activities, processes, and projects that will guide implementation and shape the community that supports it.

- Major deliverable at the end of planning project is the submission by this consortium of a Bamboo Implementation Proposal to the Andrew W. Mellon Foundation

- If successful, implementation would begin in the beginning of 2010

projectbamboo.org

How can we advance
arts and humanities research
through the development
of shared technology services?

1B. Principles of Community Design

▸ be guided by a framework of broad goals backed by a commitment to action

▸ calibrate the planning process through community feedback

▸ create an "upward spiral of conversation"
Janet Broughton, UC Berkeley

▸ conduct a "listening tour"
Dan Cohen, George Mason University

▸ search for commonalities with respect for context and uniqueness

▸ turn to the community to define responsibilities and priorities

▸ firmly respect "we"

2. Scope of the Bamboo Project and Consortium - Really Big Picture

- Based on the interests of the community and the opportunity for the arts & humanities and higher education, the Bamboo Implementation Project may have a long-term duration: perhaps 7-10 years or longer

- Based on the "Directions" that emerged from community discussions, the Bamboo Consortium may take up a wide range of activities from building shared technology services to helping to explore new digitally-enabled research practices

- This is a big scope ... We want to make sure that we can get things done and delivered. We want to build a sustainable community and technological foundation for Bamboo as a whole in the early part of the Implementation Project

- **Thus, we propose that the Bamboo Implementation Proposal focus on a 3 year initial phase (phase 1) of Implementation with concrete deliverables: 2010-2012**

- At the same time, we think it important to paint a broad picture in the Implementation Proposal of what the Bamboo Consortium could deliver over 7 years. Thus, the Proposal includes a broad Framework for Bamboo as a whole, but focuses, in detail and in most of its effort, on what is proposed for next 3 years.

projectbamboo.org

Sidebar: Terms Introduced So Far

- **Bamboo Planning Project** = what we are doing now through Fall '09

- **Bamboo Implementation Project** = the work that happens after the planning project based on Bamboo Implementation Proposal

- **Bamboo Implementation Project - Phase 1** = the first phase of the Bamboo Implementation Project

- **Bamboo Implementation Proposal - Phase 1** = the document we submit at the end of the Bamboo Planning Project to define work, secure resources, and establish the consortium for Bamboo Implementation Phase 1

- **Bamboo Consortium** = the formally constituted group that submits the Bamboo Implementation Proposal and carries out the Implementation Project
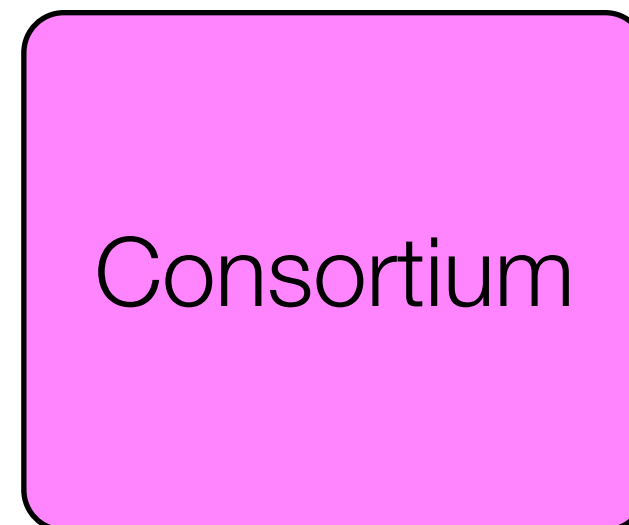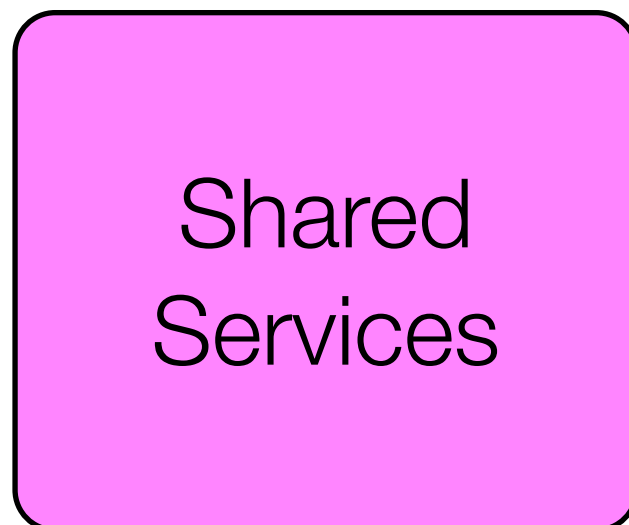
projectbamboo.org
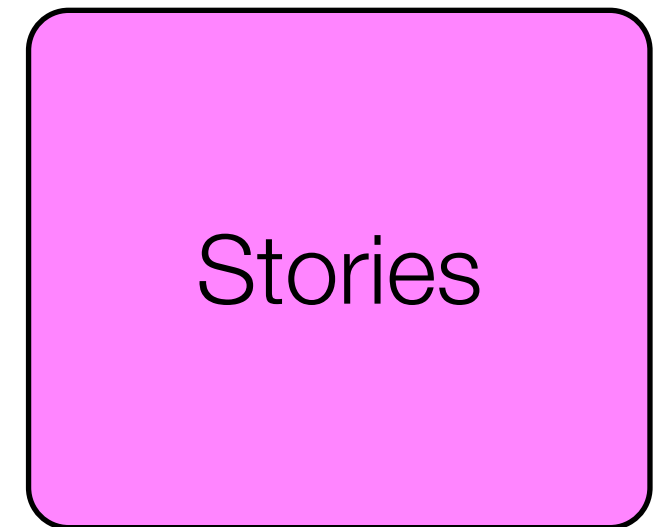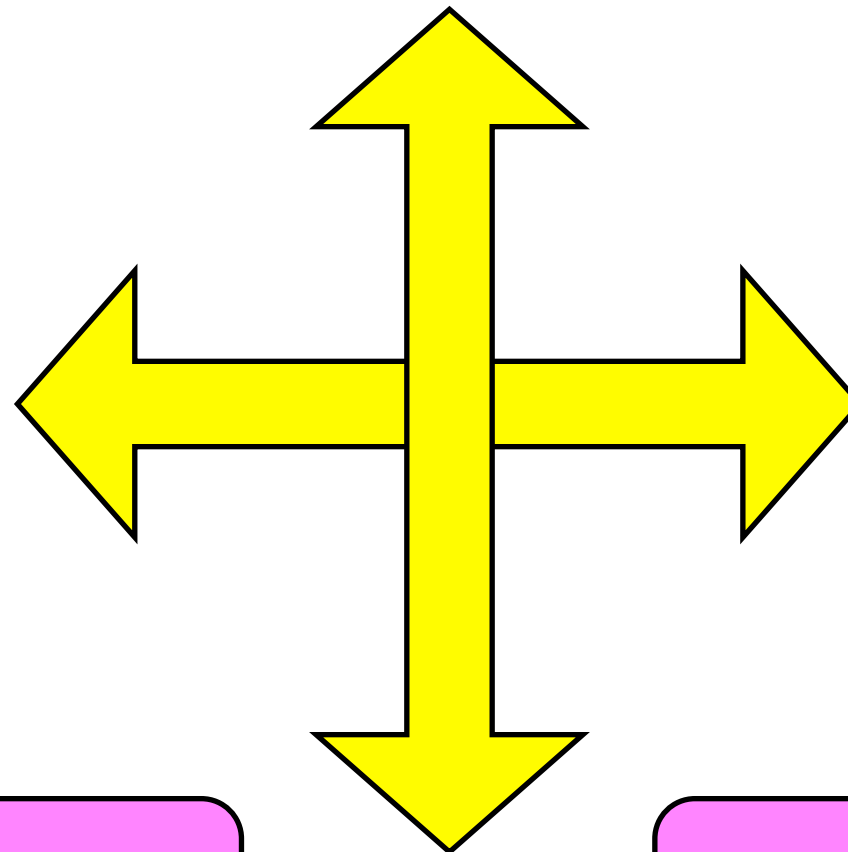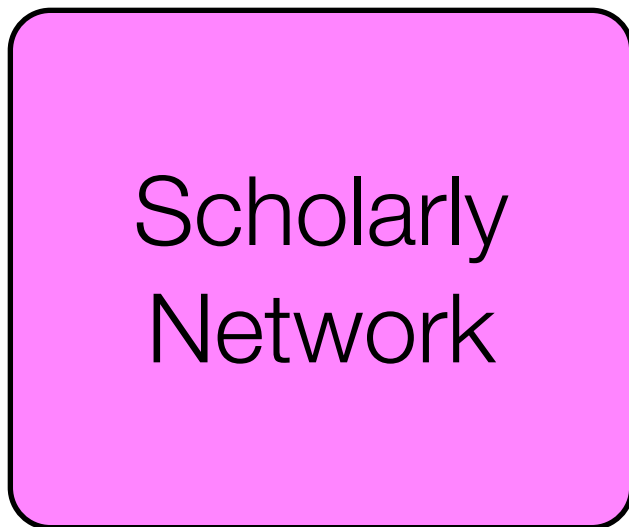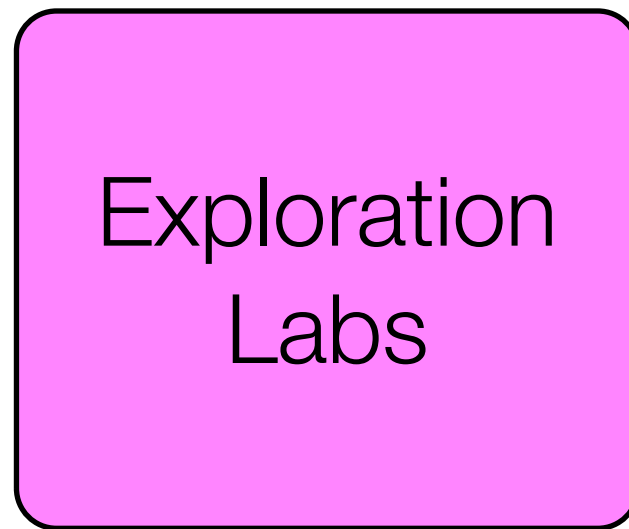
3. Major Work Areas of Implementation Proposal Phase 1: 2010 - 2012 (3 years)

1. **Infrastructure of Shared Technology Services for the Arts, Humanities, and Interpretive Social Sciences**. Build and sustain, likely in a "cloud" based model across institutions, a set of shared technology and data services that can be found, used, and enhanced across the Bamboo community.

2. **Scholarly Network for People ... and Projects, Tools, and Services**. The network of faculty, librarians, technologists, and others using this.

3. **Exploration and Demonstration Labs: Sandbox and Support**. That is, places spawned by local institutions and/or different consortia to *explore* the interplay of existing tools and infrastructure (interoperability), to build mashups of tools and data sources for faculty, to help with hands-on training, to discuss and *disseminate* the development of new scholarly practice. Places for exploration, experimentation, and learning.

projectbamboo.org

3. Major Work Areas of Implementation Proposal Phase 1: 2010 - 2012 (continued)

4. **Stories / Educational Opportunities / Best Practices Hub**: that is, a wiki, repository, etc. to share faculty stories, exemplary practices, curriculum. (This may be coupled with the Scholarly Network).

5. **Build and Sustain the Bamboo Consortium**: an ecosystem of relationships and processes that make up the Bamboo consortium at local institutions (local teams) and between institutions and organizations, including the connection to other key technology projects and scholarly affiliations.

Implementation Proposal Topics

1. ~~Context: A reminder of our major goals and our community design principles~~

2. ~~Scope of the Bamboo Implementation Project and Bamboo Consortium~~

3. ~~Major areas of the Phase 1 Implementation Proposal~~

4. How these areas are informed by work carried out so far

5. The relationship of Bamboo to other key initiatives ... an ecosystem

6. Funding, the current financial climate, and the value of working together

7. The relationship of the Implementation Proposal to the Consortial Model

   Then A Deeper Dive Tomorrow, Day 2:

8. Proposal outline

9. Early ideas on how we will develop the proposal through Fall 2009

10. A deeper dive into Phase 1 Implementation Proposal areas

projectbamboo.org

"What is Bamboo?"
from Workshop 1a (Berkeley), April 2008

BAMBOO ENABLES A SOCIAL NETWORK OF SCHOLARS & IT, REPOSTORIES & INSTITUTIONS TO SHARE TOOLS TECHNOLOGIES & PUI DIGITAL RESOURCES ACCORDING TO PROTOCOL & STANDARDS THAT REFLECT IDEALS OF OPENNESS & NEW MODELS OF PUBLICATION & SCHOLARLY OUTPUT LEVERAGE INVESTMENTS BY INSTITUTIONS & FUNDERS

4. Relationship of Working Groups to Implementation Proposal

Education

Services

Standards & Best Practices

Scholarly Networking

Tools & Content Partners

Institutional Support

Leadership & Principles
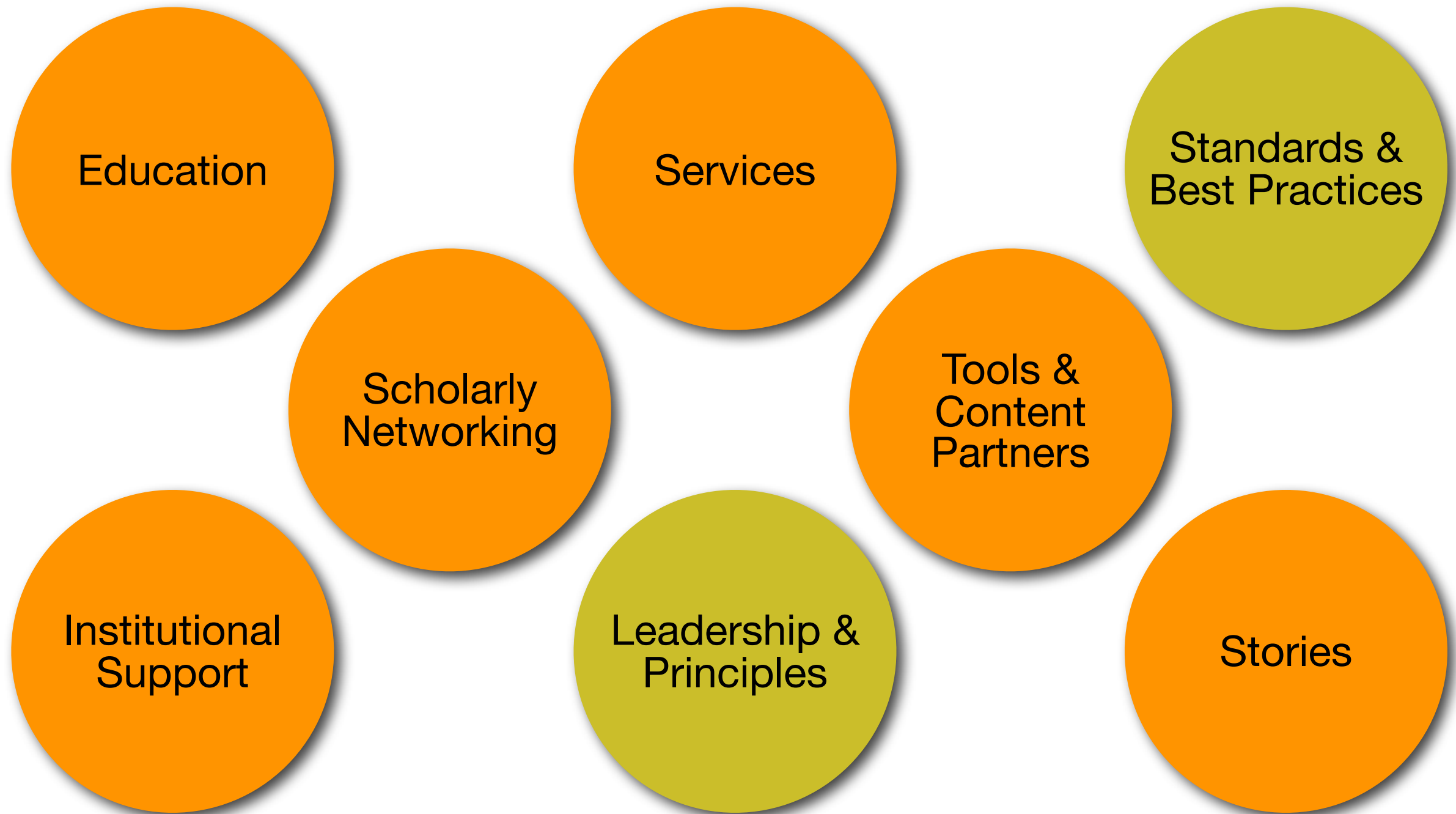
Stories

4. Relationship of Major Areas of Implementation Proposal and Current Working Groups

1. **Infrastructure of Shared Technology Services for the Arts, Humanities, and Interpretive Social Sciences** informed by:

   - Stories Working Group

   - Shared Services Working Group

   - Tools and Content Working Group

2. **Scholarly Network for People ... and Projects, Tools, and Services**:

   - Scholarly Networking Working Group

3. **Exploration and Demonstration Labs:**

   - Tools and Content Partner Working Group

   - Education Working Group

   - Institutional Support Working Group

projectbamboo.org

4. Relationship of Major Areas of Implementation Proposal and Current Working Groups (continued)

4. **Stories / Educational Opportunities / Best Practices**:

  - Stories Working Group

  - Education Working Group

  - Tool and Content Partner Working Group

5. **Build and Sustain the Bamboo Consortium**:

  - Institutional Support Working Group

projectbamboo.org

4. Relationship of Implementation Proposal to Planning Project Documents

1. Report derived from Workshops One through Three:
   Scholarly Practice in the Arts and Humanities

2. Report derived from Workshops Two through Four:
   Arts and Humanities Services Roadmap

3. Report derived from Workshops Four and Five:
   Organizational Options and Issues for Building Bamboo

4. Proposal: *Bamboo Implementation Project*

projectbamboo.org

An Ecosystem of Partnerships

- Bamboo needs to partner and align with a number of key disciplinary, content, and infrastructural / technology coalitions and initiatives to succeed and, we hope, to add value to these important efforts

- These include, but are not limited to, such initiatives and consortia as:

  - CenterNet, Humanities Centers, ACH

  - SEASR, Zotero, Sakai, Kuali

  - CLARIN, DARIAH, E-Framework from JISC and DEEWR

  - ARL, TEI

  - CNI, DLF

- *Note, it will be required of all Bamboo partners to know each of these acronyms ...*

projectbamboo.org

Funding and Current Financial Situation

- **Question**: What will the total dollar amount of the proposal be? What areas within the proposal will get more or less investment? What will participating institutions receive? What will the cost-share requirements be to participate?

- **Answer**: Right now, it is too early to answer these questions in detail. We need to know what we are doing and how we are organized in order to answer these questions even at a high level. Our plan is to drive forward the proposal so that we can have more information for Workshop 4 (April).

- **Question**: Given that in the current financial climate almost every institution has less resources, how will Bamboo proceed? Is now the time to try to build and commit to a collaborative effort across institutions?

- **Answer**: We believe the case remains as compelling as it was last spring, if not more so, about the value of collaborating across institutions and organizations internationally to increase the collective support for digital humanities. We recognize that we must take into account the new financial reality and that this only further highlights the need for a clear value proposition for Bamboo sensitive to the needs of different institutions and organizations.

projectbamboo.org

Relationship of Implementation Proposal to Consortial Model

- These areas of work are going to require partners who can and will commit to:

    - **Build** (and sustain), for example, shared services infrastructure and scholarly networking

    - **Plan** for the builds of these efforts drawing on community expertise

    - **Explore** and demonstrate tool and content interoperability with a services infrastructure, and educate others about the opportunities for scholarly practices with digital technologies

- And partners who can coordinate and leverage the efforts of other initiatives and consortia

- The Consortial Model and Partners Roles are a part of Implementation Proposal, but they are so critical to our success that we have pulled them out for more extensive discussion at this workshop

projectbamboo.org

Pause

- Tomorrow, tomorrow, tomorrow ...

Implementation Proposal Topics

1. ~~Context: A reminder of our major goals and our community design principles~~

2. ~~Scope of the Bamboo Implementation Project and Bamboo Consortium~~

3. ~~Major areas of the Phase 1 Implementation Proposal~~

4. ~~How these areas are informed by work carried out so far~~

5. ~~The relationship of Bamboo to other key initiatives … an ecosystem~~

6. ~~Funding, the current financial climate, and the value of working together~~

7. ~~The relationship of the Implementation Proposal to the Consortial Model~~

   [Then A Deeper Dive Tomorrow, Day 2:](#)

8. Proposal outline

9. Early ideas on how we will develop the proposal through Fall 2009

10. A deeper dive into Phase 1 Implementation Proposal areas

projectbamboo.org

3. Major Work Areas of Implementation Proposal Phase 1: 2010 - 2012 (3 years)

1. **Infrastructure of Shared Technology Services for the Arts, Humanities, and Interpretive Social Sciences**. Build and sustain, likely in a "cloud" based model across institutions, a set of shared technology and data services that can be found, used, and enhanced across the Bamboo community.

2. **Scholarly Network for People ... and Projects, Tools, and Services**. The network of faculty, librarians, technologists, and others using this.

3. **Exploration and Demonstration Labs: Sandbox and Support**. That is, places spawned by local institutions and/or different consortia to *explore* the interplay of existing tools and the Bamboo infrastructure (interoperability), to build mash-ups of tools and data sources for faculty, to help with hands on training, to discuss and *disseminate* the development of new scholarly practice. Places for exploration, experimentation, and learning.
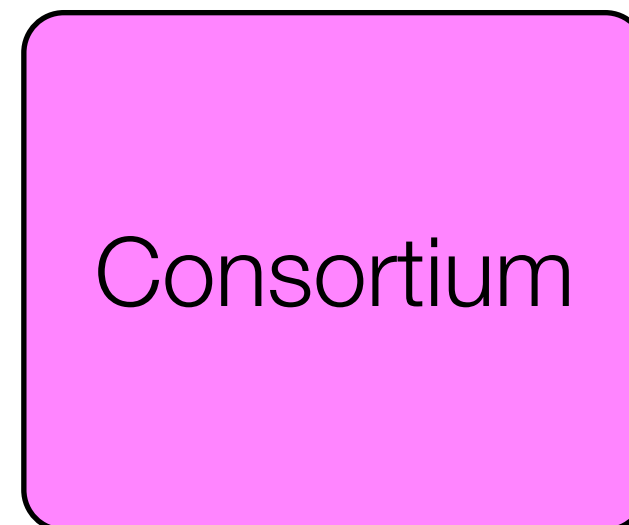
projectbamboo.org
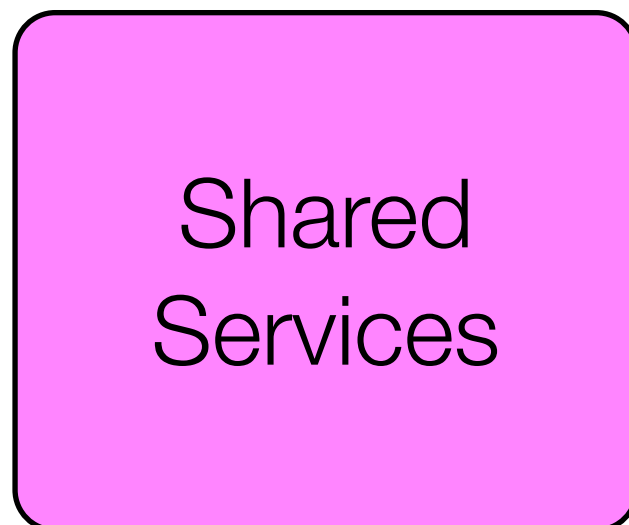
3. Major Work Areas of Implementation Proposal Phase 1: 2010 - 2012 (continued)

4. **Stories / Educational Opportunities / Best Practices Hub**: that is, a wiki, etc. to share faculty stories, exemplary practices, curriculum. (This may be coupled with the Scholarly Network).

5. **Build and Sustain the Bamboo Consortium**: an ecosystem of relationships and processes that make up the Bamboo consortium at local institutions (local teams) and between institutions and organizations, including the connection to other key technology projects and scholarly affiliations.

projectbamboo.org

Major Areas of Implementation Proposal

1. Value Proposition - Statement of Need and Opportunity (+ wiki, brochure)

2. Long Term Vision for Bamboo Over 5-7 Years

3. Major Areas of Work over 3 Years (Phase 1) - Deliverables and Approach

   3.1. Shared Services

   3.2. Scholarly Networking

   3.3. Exploration Labs

   3.4. Stories

   3.5. Consortial Model: Building, Member Roles, Sustaining

4. Bamboo Consortium: Partner Institutions and Organization and their Roles

5. Overall Work Plan

6. Budget

projectbamboo.org

Proposal Section	Related Documents	Current Working Group	Future Working Group to W4	Other Participants	Time Frame through W4
1. Value Proposition	Scholarly Practices	Institutional Support (IS)		Leadership Concil	W3 - W4
2. Long Term Vision				Engage community leaders	Early Exploration through W4
3.1 Shared Services	Services Roadmap	Shared Services (SS), Tools and Content (TC), Stories	Stories -> SS <-> TC	Experts across world	W3 - W4
3.2 Scholarly Networking	Services Roadmap?	Scholarly Network (SN)	Scholarly Networking <-> SS	Other Technology Consorita	W3 - W4
3.3 Exploration Labs		Tools and Content, Stories, Education	TC, Stories, Education, Institional Support	Centers, Libraries	W3 - W4
3.4 Stories		Stories, Education	Stories ... Even more Faculty Engaged		W3 - W4
3.5 Consortium	Consortial Model Report			Talk with institutions	W3 - W4
4 Partners and Roles					Early Exploration through W4
5. Work Plan					Post W4
6. Budget					Post W4
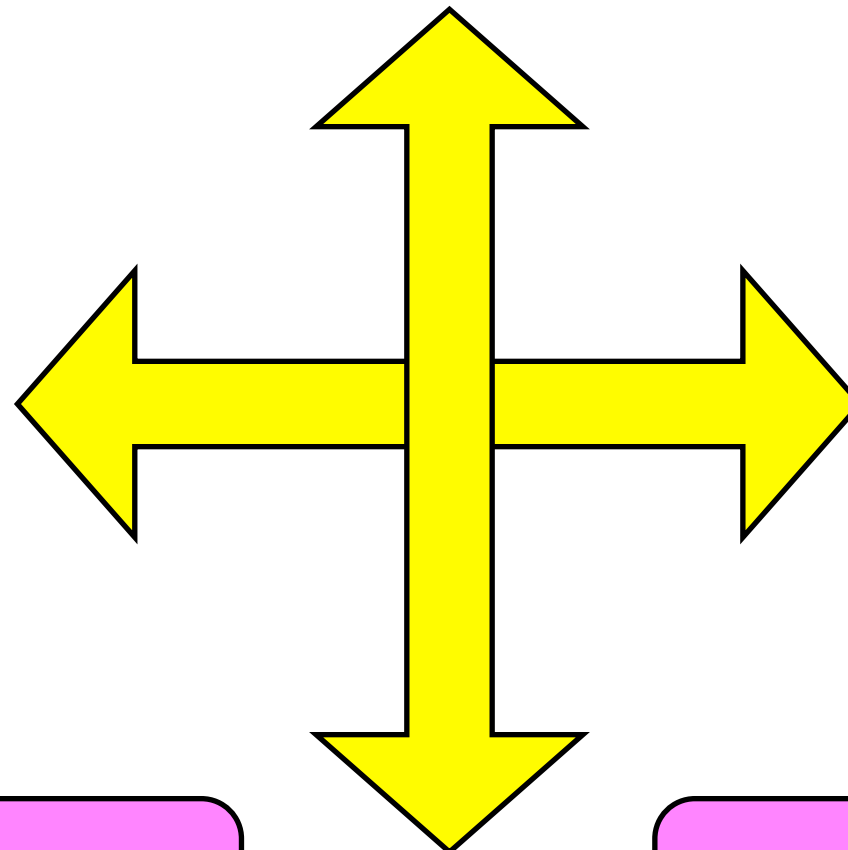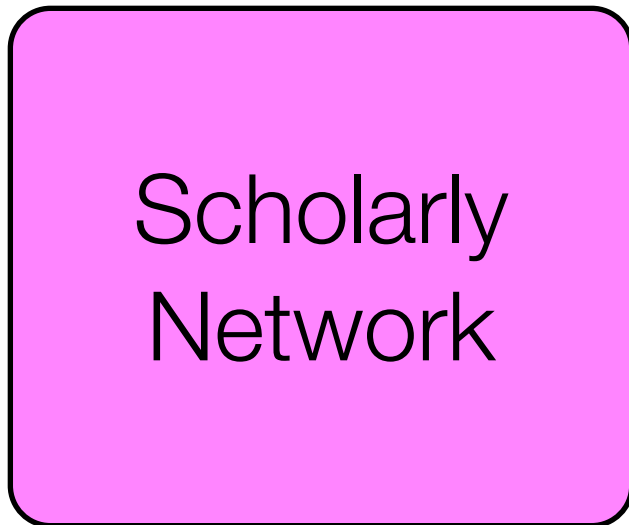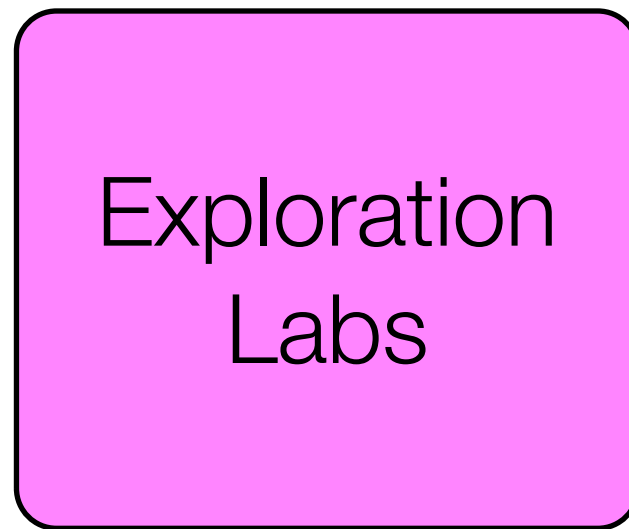
Section 3.1: Shared Services Infrastructure

- "Shared technology services" is meant to refer to more discrete, modular, re-usable web services that can be discovered and consumed by many different applications

- A "cloud" based approach, a Bamboo cloud?

- The very important interplay of tools / content and services.

projectbamboo.org

Shared Services Definition: From What *Could* Be Done to What Bamboo *Will* Do

- 4 Parallel tracks of activity that we perform in planning project:

1. Defining --- then Mining & Grouping --- Scholarly Activities

2. Explore Partnerships with Tools and Content Projects

3. Identify several key candidate "problem spaces"

4. Articulate business models for service provision & consumption

Service Direction
From What *Could* Be Done to What Bamboo *Will* Do

1. Defining - then Mining & Grouping - Scholarly Activities
    1.1. Defining: *in progress - Stories & Shared Services Work Groups*
    1.2. Mining & Grouping:
        • *engage technologists to shape service candidate from activities*
        • *engage scholars and librarians to shape value propositions*

2. Explore Partnerships with Tools and Content Projects
    2.1. *identify needed families of services*
    2.2. *articulate value propositions*
    2.3. *involves Tools and Content projects within & beyond current Bamboo Membership*

Service Direction
From What *Could* Be Done to What Bamboo *Will* Do

3. Identify several key candidate "problem spaces"
    3.1. e.g., "federated search," "building collections"
    3.2. articulate value proposition for services solution in each space
    3.3. engage scholars and technologists to articulate aspects of value proposition

4. Articulate business models for service provision & consumption
    4.1. e.g., "cloud-based," "local hosting," "regional hosting"
    4.2. identify types of costs (e.g., data center, system administration)
    4.3. consider affordability of service consumption
    4.4. articulate value propositions for each viable model candidate
    4.5. engage technologists and librarians from multiple types of institutions and organizations

3.2: Scholarly Networking

- A focus on the social network while at the same time a place to share information about projects, tools, and services

- Question about the other tools that are out there and how to build from these

- The relationship to other platforms used in higher education

- The importance for younger scholars in particular

- The connection to the general area of scholarly communications and scholarly societies

- A number of individuals who have argued strongly for the need for this investment

3.3: Exploration Labs

- Centers at local institutions and/or different consortia to:

  - *Explore* the interplay of existing tools and content and the Bamboo infrastructure (interoperability)

  - Build mash-ups of tools and data sources for faculty

  - To help with hands on training

  - To discuss and *disseminate* the development of new scholarly practice

  - To identify core tools for campus use in the digital humanities

  - Place to encourage collaboration

  - Places for exploration, experimentation, and learning

- A focus on what is provided to each campus

- A mechanism to work together to solve these experimentation and support issues

projectbamboo.org

3.4: Stories / Educational Opportunities / Best Practices

- A way to document and share faculty narratives about the use and opportunities for technology to support research, teaching, and service

- A confluence of stories that interconnect scholarly practice

- Educational materials that can benefit students and faculty

- Stories that can guide the development of services and tools ... that can help us to derive activities and use cases

- Materials that can make the case for on-going institutional support and alignment at campuses and in other organizations, such as disciplinary societies

- Materials that may help with collaboration across the humanities

Worthy Martin ...

- He does a reminder of workshop 1 data

- 120 Basic Activities ... saw come up in these discussion

- To reconnect with practices ...

- The step down to activities was a little to abstract

- So came back to Stories ....

- Definitions of activities since workshop 2 ... about 50 of the activities have been defined ... some have been deleted

- Wiki is set up to have cross-linkages between stories and activities ...

- Activities are often encapsulated in existing tools

-

projectbamboo.org

Worthy Martin cont. on Shared Services

- Gisting ... Greg Crane ... ePhilogophy and Memographies, eClassics, Research Methods, ...

- **Establish a spectrum of "services" that might be shared** ...

- {DAG note ... as we make progress put together some kind of spectrum, or roadmap of possible services ... then how do we decide where the best investment is ... BUT, we have many challenges even in defining possible services deriving these from stories and activities ... THAT IS, what is the best way to proceed with the analysis and planning}

- Shared vocabulary ...

projectbamboo.org

Scholarly Networking Group report

- John Norman ...

- They've tended to focus more on the why and the rationale ...

- Search capabilities of a machine will always have to be complemented by human insight

- Support for the isolated scholars

- Can we offer some sort of virtual interaction

- Scholarly networking may well be very valuable for early years researchers ...

- Trying to frame the social network ...

- Strong support in the room for this ... or it appears so

- John wants to call this communication and collaboration enabled profiles

1/12: Notes from Tool and Content Working Group - Tim Coles remarks

- Alot of focus on discovery

- Demonstrators as a way to get at and tease out the threads of interest

- Select content ---> deliver to tools ---> create new content

- Traceability and reference for scholars

- Just in time services

- Collaboration ... double-edge sword in humanities communities

- Shared norms for posting scholarship ... discover ... use ... enrich ....

- Discovery again ... a broader issue of for use, determining appropriateness,

- Best practice

-

Ray Larson

- People ... places ... events ... context ... and link to current context

- Take any text and build context from this

- Embedding texts ... natural language processing on text

-

Sorin Matei

- ThoughtArk

- Intellectually green technology

- Thought Ark tries to capture the things you do as a scholar and from this create metadata ... that is, capture the practices of a community of scholars

- System that mixes web of sciences and digg (that is voting up and down) with endnote/Zotero ... and a content management system

- Acts a paper writing system ... with a community around it ...

- Taking advantage of idle cycles of intellectual work

- Reversing value of a paper ... to push down ...

- Paper selected by different communities would have different value depending on who you are ...

- An ecology of research ... ecosystem ... The idea of trying to capture what people do in the metadata of your system ... AND to create a method by which various

Mark Olson

- Sequence alignment against multiple texts

- Intertextual relations that can be sited

- Very large scales ..

- Very data specific ... have teams develop the algorithim to get

- A set of aligners as a single shared resource ... based on driving town texts to the text would not exist on a particular system .. the recontextualization can be a networked resources

- Two generic services: all against all (lots of text against may other texts) or one against many ...

- Compare to biologist ... the idea is to use sequence alignment as a shared resource ... high performance computing .. deposiing shingles or ngrams ...

Kent Hooper ... Peuget Sound

- Playing all the roles ... the 95% others ... some infrastructure ... taking a text in certain forms ... consume ... spit out

- Then something that works in multiple formats ... Flash, SEASR,

- Transform ... Transform as a type of service ... and the testing and exploring of these ...

- Not good enough to just solve the one time problem, but rather think about building infrastructure from the start ... a confluence of stories .... GOOD POINTS {and point back to Mark Olson as well}

Notes from Education Working Group

- Jon McKensie ... focus on multi-media ... on broadening the sense of literacy

- Help humanists to collaborate better ... let alone collaborate at all ... a collaborative scholar , e.g., theater and film making ... less about originality and more about re-making ...

- Collaboration between faculty and IT staff ... and faculty and students ...

- 360 degree learning so that faculty are learning from students .... arrange courses so that one is learning from undergraduates and graduates ...

- Lori Emerson: Advocating ... to university administrator ... 1 to 300 ratio at U of Boulder ... rethinking curriculum ... rethinking design and function of classrooms ...

- Pedagogy ...

- Artificiality of dossier form ... almost ... an uncomfortable channelling of digital humanities into existing humanities channels ..

projectbamboo.org

Education working group - Media Ecology

- Mark Williams ... focus on content ... film ... WGBH ... film archives ...

- Soliciting demonstrator project ideas regarding to Media Ecology project

- Help faculty to imagine how they might teach ... faculty who are isolated ... courses at a very degrees

- VUE .... using Tufts tools as a way to teach class ... nice transformation ...

Duffy Gilman

- Collect narratives and or illustrative examples ...

- To try to help this community to stay together and to have a common vocabulary ...

- Start to create a methodology that will help this conversation alive among a very diverse group of people

- Creation story repository

- Analyze the stories to search out for the commonalities

- 33 Stories ... but they want more ... please keep them coming

- Connecting the working groups together ... Stories as a hub for this

- The dialouge going both ways ... to architects ... to scholars

- How to deal with the messiness ...

- How do we empower self-selected specilists to find and define {Good}

- How do we foster the exploration of innovation ...

Duffy Gillman

- Drive needs from the stories ... try this as a different angle

- 20 different submissions of Needs

- Tell the story in front of the camera ... do and hopes ...

- How do we engage better with other working groups ...

- {Great Presentation on Duffy's part}

- Working groups get in touch with Duffy ...

- A better tool for capturing stories ... A demonstrator to better capture stories

- You don't build until you have things that are very clearly defined ... {tension that comes up again} ... perhaps this is better ... {Important}

- To try to record in a step wise manner the things one does ... not a goal but a stepwise process ...

projectbamboo.org

Notes on Institutional Support

- Lee Conrad ...

- Spend alot of time thinking about what will support look like coming from Bamboo ... group thinks it will be positioned better after this meeting

- Arguments to institutional leadership

- Did look at a number of consortial models

- ACLS Report ... why one would be engaged ...

- Developing the elevator pitch ...

- Questions

    - Longer term clarity around value proposition ...

    - There hope as a subgroup to really evaluate material from Stories group, eg., that will resonate with faculty and with administrators

projectbamboo.org

Institutional Support

- A commitment roadmap ... many administrators will need that ...

- Possibly have PIs from team contact Provosts and Chancellors ... a little more direct connection this way ...

- This group really begin this work ...

projectbamboo.org