

Project Charter for E-Content Delivery Platform Review

Project Name	E-Content Delivery Platform Review Project		
Project Lead	Mike Giarlo (technical)	Organization	Digital Library Technologies
Project Lead	Patricia Hswe (services)	Organization	University Libraries (Scholarly Communications)
Sponsor	e-Content Stewardship Council	Organization	University Libraries
Customer	University Libraries and Digital Library Technologies		

Term, Abbreviation or Acronym	Definition
Cdm	CONTENTdm

Project Scope	
Business Need	The Penn State University Libraries have been using a variety of platforms for ingest and delivery of digitized content (books, journals, newspapers, exhibits, images, multimedia materials, maps, conference proceedings, and theses and dissertations). Specifically, these platforms are CONTENTdm, Olive, DPubS, and the ETD system, recently adapted for the Schreyer Honors College. This project will review these content delivery platforms currently in use as an initial step toward planning for e-content stewardship services, a key goal of PSU's e-Content Stewardship Program. Assessing the performance of these platforms will help us understand better the needs and expectations of the stakeholders involved, including (but not limited to) users of these tools and staff who must deliver content via these tools. This review will also orient Mike Giarlo and Patricia Hswe in their new roles and the environment. In addition, the review can serve as a basis for recommendations on next steps to take regarding the use of these platforms.
Project Goals	Through meetings/interviews with a range of stakeholders, the project will analyze e-content delivery platforms by exploring usage (i.e., what is actually happening with these applications in terms of use?), systems administration, local development, software community, software evolution, interoperability, and organization of information – all of which can also serve as the elements around which to structure the process of our review. (Related to this activity is a scan of what other institutions are doing with Cdm, Olive, and DPubS.)
In Scope/Out of Scope	<p>IN SCOPE: Review of Cdm, Olive, DPubS, and the ETD system from three perspectives:</p> <p>External user perspective: From the perspective of the general user (e.g., faculty and students), how does the tool best serve users? What should we do to take better advantage of delivery tools? How does the tool get in the way of users? Can this problem be overcome?</p> <p>Internal user perspective: From the perspective of staff users, what is easy and hard about using the platform? What does it do well? What should it do? What skills does it require? What functionalities do we need to take advantage of? How well do we understand its potential uses?</p> <p>Industry perspective: What are the competitors to the product? What is the support model for the tool? Does it meet evolving expectations for digital content management? Does it offer standard ways of moving data into and out of the system? Is it interoperable with other systems?</p> <p>System support/integration perspective: How do we reconcile enthusiastic support for use of a platform with challenges surrounding its integration/interoperability with other existing applications?</p> <p>OUT OF SCOPE: Review of projects or platforms not currently used to deliver digital collections, e.g., XAM, DayCMS, Oliver, ILS, or other systems. It is likely, however, that integration with, or conversion to/from, these platforms may come up and need to be addressed in some ways.</p>
Project Assumptions	Though the “industry perspective” will naturally bring other platform options to light, this review is not designed to select, or specify, new platforms for content delivery.
Project Constraints	Because of scheduling challenges, it will not be feasible within any reasonable timeline to engage every user, administrator, and developer about in-scope e-content delivery platforms. As a result, stakeholders will need to be selected from:

	<ol style="list-style-type: none"> 1. Staff in DLT, I-Tech, Digitization and Preservation, Cataloging and Metadata Services, Scholarly Communication Services. 2. Librarians who have sponsored or continue to sponsor content digitization projects. 3. Penn State University Press (largely from the perspective of a content provider, as well as a user of DPubS). 4. Non-library users, including students, faculty, and members of the Visual Resources Center. <p>An additional constraint is that in the absence of any needs requirements, assessment of these platforms will likely be limited.</p>
Project Deliverables	A summary report on the in-scope e-content delivery platforms in use by the University Libraries. The report will include a set of findings, based on our review and analysis, which will address strengths, weaknesses, and gaps in these applications. The review will be carried out in accordance with the recommended Portfolio Management Process, and all parts of the review process will be documented. A public presentation based on this report is expected.

Requirements
<ol style="list-style-type: none"> 1. Identification of stakeholders. 2. Scheduling sessions with stakeholders 3. Informal, high-level demonstrations of these platforms as they're currently used will be helpful in this review. (These demos do not have to take place prior to review but may happen in parallel with the assessment process.)

High-Level Milestones and Timeline
<ul style="list-style-type: none"> ▪ January 2010: Initial charter drafted. ▪ January-February 2010: Draft/submission of project plan. Orientation with, and overview of, the tools. Begin interviews with stakeholders. ▪ End of February 2010: Check in with Mike and Mairéad on progress of review (including re-evaluation of project scope). ▪ March-May 2010: Continue interviewing stakeholders (also finish demos/overviews of platforms, if necessary). ▪ May 2010 (end of spring semester): Submission of summary report.

Communications Strategy

Project Charter Approval Signatures

Project Sponsor

(Signature)
Name

(Date)

Project Sponsor

(Signature)
Name

(Date)

Project Lead

	(Signature)	(Date)
Name		
Project Lead		
	_____	_____
	(Signature)	(Date)
Name		
Project Manager		
	_____	_____
	(Signature)	(Date)
Name		