

Collaboration to Clarify the Cost of Curation



T2.2—Maintain register of stakeholders and stakeholder initiatives (M6-M24)

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Digital Preservation Coalition Limited by Guarantee	DPC	UK
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Executive Summary

One of the main objectives of work package 2 where this task was allocated was the engagement with stakeholders and stakeholder initiatives in the field of digital curation or that show an interest in this field. For that purpose a comprehensive network of contacts is an essential condition. The starting point for building this network was the initial stakeholder consultation in the beginning of the project (T2.1)¹. Throughout the lifetime of the 4C project this network was increased by the work of this workgroup and supported by all project partners; contacts were collated and added to the registry and used to expand the impact of the project work. As part of the sustainability plan these valuable contacts will be maintained beyond the project end to ensure the discourse goes on.

¹ D2.1 Baseline Study of Stakeholders & Stakeholder Initiatives: http://4cproject.eu/component/docman/doc_download/54-d2-1-baseline-study-of-initiatives-rev1?Itemid=

1 Introduction

The deliverable for this task is defined in the Description of Work (DOW) as follows:

“D2.2) Maintain Register of Stakeholders and Stakeholder Initiatives: Register of Stakeholders and relevant work (likely to be a spreadsheet or wiki page where 4C organises the identified stakeholders, including individuals that work on curation costings and other individuals and groups who might be interested or convinced by the work 4C is doing).²”

The project participants chose to utilise a web based Customer Relationship Management (CRM) tool to fulfil the requirements of the task and deliverable. Obviously, to remain in line with legislation relating to data protection, it would not be legal or appropriate to make this public (users agreed to be contacted by the project, not to have their details broadcast) or pass it onto people outside the project. However, we have taken steps to ensure that the registry continues to be a useful resource for the community and continues to be maintained and developed (see Section 3).

This report is intended to be a proxy for the deliverable, hence the title “T2.2—Maintain register of stakeholders and stakeholder initiatives (M6-M24)” as opposed to “D2.2—Stakeholder registry”.

1.1 The CRM

The 4C project used CRMery, <http://crmery.com/>, to record contact details for its stakeholders as well as notes of interactions with them. The database now holds 486 contacts from over 35 countries around the world.

This report describes briefly how CRMery helped the project, what data was collected and what impact it had and could continue to have in the field of costing digital curation.

Key DOW Quotes

“The register of stakeholders and stakeholder initiatives that has resulted from T2.1 will be maintained and updated by this task during the lifetime of the project. It will enable and support the selection of representative contacts for interviews, focus groups, workshops, to be delivered in T2.3 and T2.4. A mechanism will be devised to associate individuals, groups and institutions with the 4C project and an information exchange will be established with groups that do similar work (e.g. regular mutual status-updates; a joint news service). Stakeholder groups from the private sector will be paid special attention. Consideration will be given in T1.6 (sustainability and benefits realisation) how this resource might be maintained beyond the duration of the project.”

² 4C - Description of Work, page 9

2 How CRMery served 4C

2.1 Why CRMery

A Customer Relationship Management (CRM) system is an easier way to keep track of stakeholders (customers) and your interactions with them. It was particularly useful for sharing information within the 4C project and its 13 partners, at various locations in Europe.

The project used CRMery, <http://crmery.com/>, an open-source CRM system that works well with Joomla, the content management system that is used to manage the online presence of the 4C project, <http://www.4cproject.eu/>.

CRMery has a user-friendly interface, which was easily grasped by the project team. The team were provided with a user guide. In addition to simple instructions for how to use the program, the guide included ground rules for what data to record. The two main principles for were:

- be selective, enter key contacts only;
- a CRM system is as good as the data in it therefore contact details must be periodically reviewed and updated.

A communications facility, acyMailing, <https://www.acyba.com/>, was used alongside CRMery. This permitted electronic communications (e-newsletters, emails), which in turn helped identify outdated contact details from automatic responses ('user unknown' for example).

2.2 Data

The CRM database contains a total of 486 of contacts, representing all stakeholder groups the project had set out to reach, which were:

- **Commerce**—digital preservation vendors, publishers and content producers, small and medium enterprises, cost model experts (for example Preservica, Arkivum, Ex Libris, Artefactual, European Central Bank, Lloyds Banking Group, Figsare);
- **Culture**—memory institutions and content holders (Historical Archives Macau - China, Danish National Archives, National Library of Estonia, National Library of France, Deutsche Bahn Museum, Australian National Data Service);
- **Education**—universities (Fraunhofer Institute for Photonic Microsystems, TUWIEN—Viena University of Technology, University of Botswana, Federal University of Goi—Brazil, University of British Columbia—Canada, Kaunas University of Technology—Lithuania, Nanyang Technological University—Singapore);
- **Science**—research funders, big data science (CERN, European Space Agency, Wellcome Trust, Engineering and Physical Sciences Research Council, National Research Foundation of South Africa);
- **Government**—government agencies (Innovate Scotland, NASA, Saudi Fund for Development, National Records of Scotland, Danish Maritime Authority).

Commercial companies and universities showed most interest in the project, each category comprising a third of contacts, followed by cultural institutions with just under a quarter, see Figure 1.

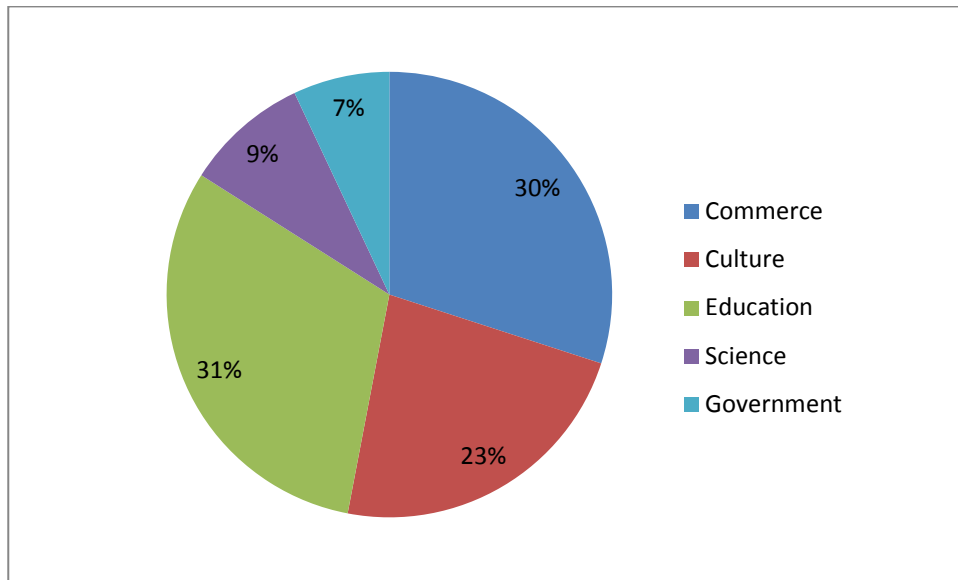


Figure 1—Number of 4C project contacts by key stakeholder group

2.3 Impact

The project attracted international interest with people coming from over 35 countries from Europe and beyond. Samples countries from outside Europe: USA, Canada, China, Saudi Arabia, Israel, New Zealand, Australia, Iran, South Africa, Botswana, Brazil, Singapore.

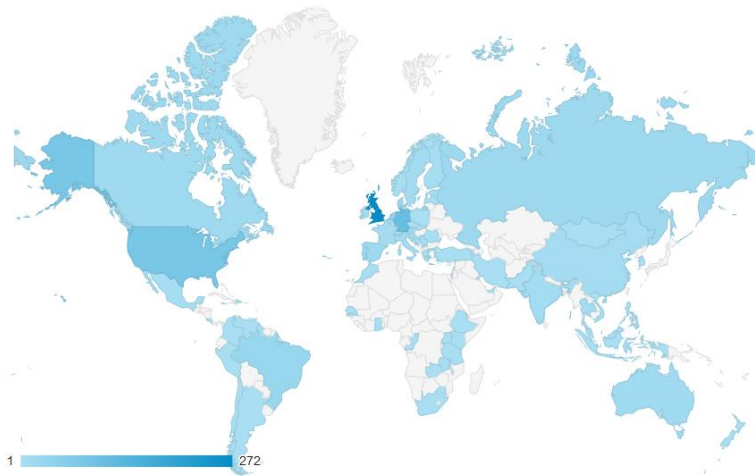


Figure 2—Plotting 4C stakeholders on the world map. Countries in dark blue generated the highest number of stakeholders.

Our discussions on costs attracted interest from industry, those who, through dialogue with consumers (those who produce and need to access data) should come with cost-effective solutions for data storage, curation and access. The project conference, ‘Investing in Opportunity: Policy Practice and Planning for a Sustainable Digital Future’, held on 17th–18th November 2014 attracted 154 delegates.³

³ See D2.3 and D2.4 for details on stakeholder groups and engagement

Communications by email also demonstrated interest in 4C and its actions. The ‘good bye’ message, for example, was sent to all contacts one week before the closing of the project and was opened by over 33%⁴ of total recipients, which is a typical opening rate for mass mailings.

The register helped compile lists for invitations to particular engagement activities, such as focus groups, workshops and also to gather feedback on the Curation Costs Exchange⁵ and the Roadmap⁶.

2.4 Lessons Learned

Choosing an appropriate CRM system, with a built in communications facility which permits email marketing, is crucial in building a community.

A functioning contact register is essential for good engagement work and ideally would be implemented at the very beginning of a project (if not before) to ensure familiarisation with a register and have it integrated in the daily business of all partners involved in the project.

The projects CRM user guide should have impressed upon the team members that they *must* record their key contacts as soon as possible after a meeting or discussion. Catching up will always be difficult, particularly since most of the people selected for recording in the CRM are in senior positions, highly specialised and therefore highly mobile.

Contact details for stakeholders in a community are a precious resource and the data must be periodically reviewed. A bi-annual newsletter helps identify invalid email addresses.

Sustainability is an issue for a finite project. One of the project partners, the DPC, has undertaken to look after the data for another year beyond the end of the project. Steps are being taken⁷ to allow a follow-up project to make use of this resource.

⁴ Latest numbers from 28th January 2015

⁵ The Curation Costs Exchange: <http://www.curationexchange.org/>

⁶ The 4C Roadmap: <http://4cproject.eu/roadmap>

⁷ Primarily gaining permission from the contact for their data to be transferred and/o allowing them to, opt out

3 Conclusion

The 4C project has brought together a community, representing all key sectors interested in the costs of data curation—commerce, education, culture, science and government. Many key contacts are now saved within an easy to use database, with an electronics communication facility attached to it. The challenge now is to maintain dialogue with this important community.

The CRM and contact data will be maintained for a period of 12 months beyond the life of the project by the 4C Consortium as part of their sustainability plan. During this time, it will be determined the longer term stewardship of the CRM and contact data and, in consultation with the contacts, how this community list should be passed over to another group (which could include the European Commission) to be taken forward in related new work to maintain momentum and to avoid duplication of effort.

References

4C Project, Description of Work (DoW)

D2.1- Baseline Study of Stakeholders & Stakeholder Initiatives:

http://4cproject.eu/component/docman/doc_download/54-d2-1-baseline-study-of-initiatives-rev1?Itemid=

D2.3—Final Stakeholder Report

D2.4—Final Report on Outreach Events

The Curation Costs Exchange: <http://www.curationexchange.org/>

The 4C Roadmap: <http://4cproject.eu/roadmap>