Providing resources for staff and students in higher and further education in the UK and beyond

Strategy
2011–2014
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1. Director’s introduction

This is EDINA’s Strategy for future activity, to guide and motivate our business planning and to help us enhance our efficiency and effectiveness in the interests of the communities we serve.

Our mission can be simply stated: to enhance the productivity, quality and cost-effectiveness of research and education in the UK and beyond. This has successfully guided our development to date as a national academic data centre, helping us judge what we should and should not try to do. We view the current economic circumstances as an urgent opportunity to assess and re-assess areas in which we can add value, focusing anew on the assistance we can provide to institutions as they manage the difficult years ahead. As the Government aims to drive down public debt, and universities and colleges work within reduced budgets, EDINA offers clear benefits and solutions for the sector and the wider economy by providing shared services and infrastructure that save institutions money.

Our Strategy provides justification for the trust and investment placed in EDINA as a national academic data centre by the Joint Information Systems Committee (JISC) on behalf of the UK funding bodies for education and research and the wider UK academic community; by a wide range of national bodies (e.g. research councils such as the Economic and Social Research Council (ESRC) and the National Environment Research Council (NERC)); and by UK universities and colleges. Proper note has been taken of their strategic aims and objectives, and those of the University of Edinburgh, our parent body, from whose critical mass of expertise and resource the UK academic community is able to gain leverage, with its proven record on energy efficiency, providing opportunity to help shape national and international developments.

This Strategy prepares us for working with JISC, helping to support the ‘open agenda’ for research data, publications and educational resources, and to assist institutions in their relationships with business and the civil community. It is also a springboard for outreach and engagement as EDINA continues to develop close and effective partnerships, especially with those in the ‘JISC family’ and with national and international groups – governmental, educational, commercial – that support research and education. It prompts us to continue to work ever closer and more effectively with the academic support staff within institutions that subscribe to our services in the higher and further education sectors. It also gives us confidence to rise to the challenge of online service provision to the schools sector in ways that are relevant to their curricula and prepare them for work and further learning.

The purpose of this Strategy, therefore, is to prompt us to secure agreement to do the right things, and to help us with our responsibility to ‘do things right’, recognising the imperative in the light of current economic conditions to tell our success ‘stories’, demonstrate our impact and also to be pro-active in taking forward the benefits of innovation from the application of information communication technologies.

On behalf of all at EDINA, I welcome feedback on our Strategy and on how we can collaborate to implement our goals in what we do. The best way to appreciate what we do currently is to visit our website, edina.ac.uk, to browse good quality case studies and documentation, including our Community Report. Tell us what more we can do for you.

Peter Burnhill, Director of EDINA
2. Mission

EDINA seeks to enhance the productivity, quality and cost-effectiveness of research and education in the UK and beyond.

EDINA is a UK national academic data centre, designated by JISC on behalf of UK funding bodies to support the activity of universities, colleges and research institutes in the UK, by delivering access to a range of online data services through a UK academic infrastructure, as well as supporting knowledge exchange and ICT capacity building, nationally and internationally.

EDINA innovates, generating knowledge, expertise and trust, through a focus on ease and continuity of access to scholarly resources and tools.

3. Values

EDINA values:

- **Excellence** in its work and the work of others
- **Knowledge, expertise and understanding** in service delivery and research work
- **Engagement** with stakeholders, users and partners, nationally and internationally
- **Innovation and enhancement** gained from talent and technology
- **Efficiency and effectiveness** in using resources and time well
- **Enthusiasm** in working for the benefit of those it serves
- **Trust** in its value-added and cost-effective shared services
4. Context

4.1 The University of Edinburgh and EDINA

The University of Edinburgh provides some of the most advanced academic computing and e-science infrastructure facilities in Europe, including services that facilitate world-leading research.

Information Services at the University plays a leading role in knowledge management, with one of the largest university libraries in the UK and international and national engagement through EDINA and the Digital Curation Centre (DCC), the UK’s leading centre of expertise in digital data curation. This supports and forms part of the leadership role the University has in the development of e-research infrastructure management and performance.

Based at the University of Edinburgh, and with a satellite office in Warrington, England, EDINA provides online data services, working closely with its sister data centre Mimas (based at the University of Manchester), with JISC, and with JISC Collections. EDINA is a centre of excellence that creates and develops cost-effective shared services, mostly within the JISC Information Environment (IE), which are essential for research and education – especially those not readily provided by commercial suppliers. Free at the point of use, some services are specialist in nature and some require institutional subscription. Others are on open access.

EDINA is an established part of the academic information landscape in the UK, drawing upon the acknowledged expertise of its staff, with synergy derived from being both the University of Edinburgh’s data library and a national digital library. EDINA generates knowledge, provides services and carries out innovative projects to help shape the future and improve understanding.

EDINA has a special role to enhance the productivity and quality of research through ‘geo-enabling’ resources and participating in the development of the academic spatial data infrastructure (SDI), as Government and public bodies, including universities, make data more available and respond to the EU INSPIRE Directive. EDINA does this for the university and research community through activity with the UK Location, the research councils, European equivalents, the DCC and through working with DISC(UK), the national grouping of data libraries.

EDINA participates in national and international activities to ensure both ease and continuity of access to scholarly resources, e-journal content, data and multimedia, including born-digital material that originates within research and university organisations. It offers leadership in developing and implementing ‘middleware’ to support interoperability and effective arrangements for identity and access management. It has specific collaborative work with Mimas to provide sustainable infrastructure for the collection and presentation of educational resources produced by the academic community.

4.2 Responding to change

Public finances

The most significant change in the external landscape for EDINA since publication of its last Strategy has been the Government response to public debt and its impact upon public expenditure. There will be tight funding restrictions in the public sector over the next few years. EDINA will add to its focus on quality and productivity with a concentration on the shared services it provides that enable institutions to save money, as well as on managing any reductions in core funding. This includes recognising areas where it no longer needs to act or cannot secure revenue, but also involves building capacity where it can for the long-term.

1 www.dcc.ac.uk
2 Tagging internet resources with geographic terms e.g. placenames.
3 See Appendix Two.
4 See Appendix Two.
5 www.disc-uk.org
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**Shared services**

Shared services are seen as enablers of cost cutting and efficiencies whilst keeping the focus on quality and productivity. As a national academic data centre, EDINA has a good reputation as a provider of innovative shared content and infrastructure services.

With Mimas, EDINA supports the UK Open Educational Resources (UKOER) programme, which seeks to embed the sharing and reuse of high quality educational resources created by the academic community. EDINA backs the shared services models envisaged by the HEFCE-SCONUL Shared Services Business Case in the Scholarly Communication area and will play its part in any framework that results from this and/or from the Resource Discovery Task Force Vision. EDINA is seen as a leading partner with the Ordnance Survey and other national agencies in the creation of the academic SDI in the UK, providing key elements including a geospatial portal and key geographic datasets. It is also seen as an essential partner in Europe, where it is working with others to develop a best practice network and evaluate the theory of integrating national SDIs.

**Proving impact and value for money**

As a provider of shared content and infrastructure services, EDINA is delivering efficiencies to the HE and FE sectors, and is providing the necessary qualitative and quantitative information required by JISC to enable it to prove impact to Government and the community. It is also important that EDINA tell its success ‘stories’ clearly, demonstrating its impact in the academic community. One key area in which EDINA will act is to provide an integrated multimedia service, replacing its former services in this business area, and offering economies of scale and value for money to the community.

**Universities and enterprise**

Education, research, innovation and enterprise are key drivers to enable the UK economy and society to compete and flourish. EDINA will investigate how to provide better support for business and community engagement by institutions, where there is synergy with its mission to enhance the productivity, quality and cost-effectiveness of research and education. EDINA’s commitment to open access means that some of its services are already available to all sectors, and it will do more to explore and sustain non-grant-funded revenue streams.

**e-Research**

The RCUK Review of E-science took place in December 2009 and the University of Edinburgh was a contributor to the review. The international panel viewed the e-Science Programme in the UK as ‘world-leading’ and as having made significant economic impact. EDINA has strong links with the DCC and the e-Science institutes at the University of Edinburgh and elsewhere, and over the period covered by this Strategy will be making a significant contribution to the security aspects of providing web services.

**Geo-enabling**

Geographic data are strategic: this is why they feature in the ‘Free our Data’ movements, in Government and commercial thinking, and why attention is needed to serve the special interests of UK research and education. With the go-ahead to build the UK SDI, investment of attention and funding is needed to ensure that Internet-accessible resources (text, numeric and audio-visual) are tagged with geographic terms (geo-enabled) in order to reap rich rewards for scholarship and enhance the UK’s reputation. EDINA provides a set of web services intended to help researchers, developers and online service providers realise the potential currently hidden within geospatial digital resources.

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6 SCONUL (2009) HEFCE Shared Services Study: Business Case [helibtech.com/Shared+Services](http://helibtech.com/Shared+Services)
7 rdtf.jiscinvolve.org/wp/
8 [www.epsrc.ac.uk/research/intrevs/escience/Pages/default.aspx](http://www.epsrc.ac.uk/research/intrevs/escience/Pages/default.aspx)
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Open sharing and open data
EDINA supports the UK research and education sector in its move to ‘open’ sharing and licensing of resources. The ‘open’ and ‘free’ agendas in software, content and data provision are major drivers in the external context, including the proposal to open up Government data in the Making Public Data Public initiative and the Smarter Government White Paper in 2009, and the subsequent establishment in 2010 of the Cabinet Office’s Public Sector Transparency Board. Academics and institutions, too, seem increasingly willing to make content available, provided that the right support and reassurance about reuse and representation are available.

A major development for EDINA was the open release from April 2010 of some Ordnance Survey (OS) datasets. EDINA is now involved in R&D to develop open web services, taking the OS data, processing it and releasing it as maps delivered via web services. EDINA also plans to develop open machine-to-machine (M2M) services, which will empower others to geo-enable their services.

Linked Data
UK and US Government agencies, including UK Location, are promoting the use of ‘Linked Data’ as a practical way of maximising the reuse of data and enabling effective cross-organisational sharing. Linked Data offers another way to provide M2M interoperability across EDINA’s services in its various business areas. EDINA will undertake a technology watch in this area and act where this is sensible. Establishing provenance and trust will be essential.

Specialist support
Increasing demands on institutional finances are leading to a reduction of specialist support staff at a time when there is growth in awareness and use of complex data, such as geospatial data; and students, as fee-payers, are demanding more support and richer user experiences. EDINA will participate in Research Council and community endeavours to provide support for the use of geospatial and other complex research data by staff and students.

Energy efficiency
The University of Edinburgh has been very successful in cutting carbon emissions. Edinburgh has cut its energy use by 31% since 1990, even though it has trebled in size during that time. EDINA’s computing hardware is hosted externally to EDINA in the University’s machine rooms and EDINA benefits from University level initiatives. EDINA will also continue to make staff aware of their responsibilities regarding energy consumption in the office and in travel. It will continue to provide online training and events, and support initiatives making use of virtual facilities by others.

Mobile Internet
The growth of GPS (Global Positioning Systems) mobile devices and of location based services continues to be very important for education. Techniques, e.g. for geo-coding speech, will enable students visiting particular locations to find educational resources about those locations. Virtual reality will be important, e.g. for enriching experiences for remote students. Augmented reality applications will allow 3D models to be superimposed on camera views e.g. to ‘see’ inside a building façade. EDINA has been undertaking technical and user research and development in various mobile applications and is planning for delivery of mobile-based services.

Ensuring continuing access to resources
The central task of stewardship is to ensure that researchers, students and their teachers have continuity of access to the resources they need. Online access to digital content brings many benefits but the

10 data.gov.uk
12 www.guardian.co.uk/education/2009/dec/08/green-revolution-edinburgh-university
community needs to plan and to act in order to achieve the assurance that this access will persist. EDINA is playing a leading part, not only with regard to digital content but also seeking out ways in which it can contribute through cooperative national and international activity with others.

**Schools and colleges**

EDINA has been prompted by JISC Collections and the Ordnance Survey to provide Mapping and Multimedia services to the schools sector, and in part this is an opportunity to become more self-sustaining. Measures will be taken to ensure that the work will not impact on the core work of providing services to HE and FE. The challenge over the period of time covered by this Strategy is to understand more about this sector. It is not entirely new to EDINA, as it has for some years provided service into schools, but much remains to be learned.

Ministerial statements from the new Government have indicated that more HE will be delivered in FE colleges. More structured curricula can be expected and employability is a key issue. It is important for EDINA to understand better the needs of the sectors that are curriculum-driven and find ways to support them more effectively.

**4.3 External factors affecting EDINA’s strategic business areas**

Activities within EDINA’s strategic business areas are undertaken to fulfil its mission to enhance productivity, quality and cost-effectiveness in research and education in the UK, drawing upon over twenty-five years of experience and technical expertise in data and online services.

The business areas correspond to the presentation and thematic areas projected on the EDINA website: Reading & Reference (within the broad field of scholarly communication), Maps & Data (especially that which is geospatial), Multimedia & Education (the latter including specific attention to Learning and Teaching [L&T]), and Middleware & Infrastructure (including both a focus on Access Management and on interoperability and registries).

Much of the strength of EDINA lies in how expertise in one area can be leveraged for the purpose of achieving successful outcomes in another area, e.g. geo-enabling bibliographic and multimedia services.

Important external factors for each business area in the period covered by this Strategy are:

**Reading & Reference**

- Large commercial and not-for-profit players already working in this area, prompting EDINA to identify its added value for the community, to fill the gaps between what institutions need and what the commercial sector offers

- The report from the RLUK-JISC Resource Discovery Taskforce, describing a vision statement for the provision of a shared UK infrastructure to support education and research

- The models envisaged in the (HEFCE) SCONUL Shared Services Business Case, which could enable institutions to save much recurrent expenditure

- The ‘Open Access’ (OA) agenda, spurred on by price and copyright issues, mandates for deposit into repositories, and the variety of ‘informal’ links between author and reader

- Global and national action to counter threats to continuity of access through digital preservation.

- The Research Excellence Framework and what the new Government’s approach to impact measurement will be, following the postponement to 2011 and further review

- Requirements to link data to outputs, and the infrastructural work required to enable scholars to obtain full text

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13 nds.col.gov.uk/content/Detail.aspx?ReleaseID=414467&NewsAreaID=2
14 www.guardian.co.uk/education/2010/jun/10/david-willetts-student-degrees-fe
15 nds.col.gov.uk/content/Detail.aspx?ReleaseID=414522&NewsAreaID=2
• Google Scholar, which sets a standard for resource discovery to full text sources and influences discovery to delivery activities

**Maps & Data**

• The need to geo-enable services in the JISC IE, with increasing recognition of the importance of ‘place’ as a means for searching for many different kinds of resources

• The UK Location Programme, a response to EU INSPIRE Directive, which is central to the establishment of the UK SDI and implementation of Geographic Information (GI) strategies by regional and national Governments

• The growth of location based services and location aware devices, and advances in augmented reality

• The availability of open geospatial datasets from OS and the ‘Free Data’ movements, and open philosophies and approaches in data, software and services

• The aspiration of the Public Sector Transparency Board to publish the bulk of UK Government data as Linked Data

• Google Earth’s business model and apparent simplicity, which profoundly influences all other geospatial services, because it alters how people perceive and access geospatial data

• ‘Crowd sourcing’, e.g. where individuals participate in the capture and upload of spatial data, and ‘ground based data capture’, through laser scanning and ‘point clouds’

• The ‘Semantic Web’, connecting data across the internet by their semantics, or meanings - a major challenge for geospatial web services over the coming years

• The need for interoperability between different datasets and the enabling of mashups

• Restrictions on the reuse of data by IPR considerations, and recourse to Digital Rights Management mechanisms

**Multimedia & Education**

• Global multimedia services, such as YouTube and Flickr, and how EDINA's services can be distinctive and cost-effective for the academic community in relation to them

• Developments in on-demand media

• Major cultural content projects, such as the BBC, National Archive, British Library and Europeana

• The speed of change in web technologies

• Digitisation programmes that create digital surrogates of physical objects

• Widespread production and issue of ‘born digital’ multimedia, especially within universities and colleges

**Learning & Teaching**

• Other academic OER repositories e.g. Open Learn from OU, and repositories offered by commercial organisations e.g. Apple iTunesU

• Usage of mobile devices by the educational community

• Increasing expectations that students will be involved in creating their own learning resources and uploading them to repositories

• Portfolios, e-assessment and personalised learning

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**Middleware and Infrastructure:**

**Machine-to-machine (M2M)**

- The INSPIRE Directive, the aim of which is to establish the necessary infrastructure for the exchange of, and access to, spatial information in Europe
- Increasing volumes of data, partly as a consequence of INSPIRE, and the need to integrate them for new data publishers
- Data publisher models changing eg the move by Census agencies to deliver data via machine Application Programming Interfaces (APIs)
- Increasing costs – leading to a ‘collect once, publish many times, in many formats’ model by external agencies eg Office for National Statistics (ONS)\(^7\)
- The popularity of federated searching by libraries and the success of the router provided by EDINA for resolving Open URL links
- Technology trends in hardware prices, leading to consumption of third party data rather than central hosting eg OS OpenSpace model\(^8\)
- Open source and open data agenda leading to greater transparency (via machine interfaces) and profusion of sources
- ‘Cloud services’ for spatial data, decoupling of data from applications
- Maturation of Linked Data and the provision of machine-readable versions in parallel with human-readable resources
- A trend towards ‘Unix tools philosophy’ in web services - small services that do one simple thing well, and can be chained together to create more complex results\(^9\)
- Streams of resources (machine-readable data) with annotation and linking and formal publication, done by other services
- Advances in named entity recognition to do more ‘structure mining’ from text documents, resulting in linkable data
- The expectation that personalisation and social features will be viewed increasingly as requirements for services

**Access Management**

- JISC’s policy initiative in the UK to deploy Shibboleth as the next generation access management technology for authentication and authorisation across the science and education sectors
- The UK Shibboleth federation is the largest in the world The technology is of key strategic importance for UK education and research and is leading-edge
- Given the substantial level of commitment to the technology in the UK, it is essential to maintain the expertise necessary to sustain service provision
- EDINA piloted the Shibboleth technology in the UK and has an interest in its continued success through ongoing provision of support to the sector

\(^7\) [www.statistics.gov.uk/default.asp](http://www.statistics.gov.uk/default.asp)

\(^8\) [openspace.ordonancesurvey.co.uk/openspace/](http://openspace.ordonancesurvey.co.uk/openspace/)

\(^9\) A simple example is [packrati.us](http://packrati.us) which follows a Twitter feed and re-posts links and tags to delicious

5.1 Strategic fit

As a university-based national data centre and a national provider of services, EDINA’s strategy is closely aligned with those of the University of Edinburgh and JISC. There is also a wider set of stakeholders whose strategies and policy statements have importance for EDINA. They are listed in Appendix One.

With a designated role provided by JISC, EDINA looks to JISC to assist it with its sustainability as a national academic data centre, accepting the responsibility to develop its own strategic sustainability imperatives.

5.2 Strategy overview

EDINA seeks world-class effectiveness and sustainability through:

- **Activity and Value Proposition**, providing added-value, cost-effective services that users want, often in strategic partnership with other organisations

- **Resources and Context**, maximising the return on the tangible and intangible assets of the data centre, especially the reputation and ‘know-how’ of staff

- **Finance and Liabilities**, securing sufficient resources to meet EDINA’s goals over the medium- to long-term, and taking into account liabilities incurred

EDINA has three main strategic goals, and within each of them, three key strategic themes. They can be summarised as follows:

<table>
<thead>
<tr>
<th>Mission</th>
<th>To enhance the productivity, quality and cost-effectiveness of research and education in the UK and beyond ... by delivering access to a range of online data services and supporting knowledge exchange and ICT capacity building, nationally and internationally</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic goals</strong></td>
<td><strong>1. To provide added value, high quality, cost-effective services, leveraged by R&amp;D, enhancement activity and engagement with others</strong></td>
</tr>
<tr>
<td><strong>Strategic themes</strong></td>
<td><strong>1a. Providing a managed portfolio of added value, high quality services</strong></td>
</tr>
</tbody>
</table>
5.3 Strategic goals and themes

This section describes the goals of the Strategy, along with the aims and objectives of the themes in more detail.

**Strategic goal 1:**

**To provide added value, high quality, cost-effective services, leveraged by research, enhancement activity and engagement with others**

This goal drives EDINA's activity locally, nationally and internationally; and its value proposition to its stakeholders and users.

Within this overall goal, EDINA has identified three key strategic themes.

**Strategic theme 1a:**

**Providing a managed portfolio of added value, high quality, cost-effective services**

**Aim**

To support EDINA’s end-user and contributor communities in research, education and knowledge exchange by the provision of quality assured, cost-effective services and support.

**Objectives**

*Support research, education and knowledge exchange by providing added value, high quality, cost-effective online services and infrastructure*

- Work with JISC and JISC Collections to deliver value-added centrally procured e-resources and infrastructure to the academic community that save money for individual institutions and for the sector as a whole
- Work to keep service costs as low as possible, to ensure that the academic community receives value for money
- Prove impact by sharing success ‘stories’, contributing to JISC’s impact targets through collecting qualitative and quantitative information about services, and meeting targets for services laid down in the Service Level Agreement
- Develop new services and additional collections where applicable, in line with user requirements and availability of funding
- Manage successfully the transition of projects to services, where funding allows

*Support the development of the academic infrastructure in the UK and internationally*

- Participate in the development of the JISC IE and international e-Framework for Education and Research
- Consolidate and mature the academic SDI in the UK and in Europe
- Participate in developments towards a shared UK infrastructure for scholarly communication

*Reach out to new communities of users*

- Support educational sectors outside EDINA’s usual constituency, where this fits with strategic objectives, including the Schools sector and Research Councils
- Continue and expand engagement with the public sector eg central and devolved Government, where it is of demonstrable value to EDINA’s core constituency
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- Consider the provision of ‘third sector’ services i.e. services to non-Governmental organisations in the voluntary and community sectors
- Develop and deploy open datasets e.g. include rights-free international data in geospatial middleware

Seek opportunities to join up services

- Externally, e.g. working with Mimas to create better value for the academic community
- Internally, e.g. the provision of an integrated Multimedia service, and the geo-enabling of services in other business areas

Provide high quality outreach and support services for contributors, end users and support staff

- Continue to provide high quality, cost-effective helpdesk, training, promotional and support services, and maintain EDINA’s excellent reputation for user support
- Value user feedback to make service enhancements and ensure relevance to users
- Collaborate with other support and advisory organisations, especially JISC Advance
- Provide appropriate virtual assistance to users to reflect evolving technologies

Enhance content, presentation and delivery of services in response to community requirements

- Implement improvements in services, as funding permits, to enhance their content, performance, speed, resilience, usability and/or accessibility
- Deploy services based on mobile technologies

Future-proof access for researchers of tomorrow

- Provide added value services and shared infrastructure to support continuing access to service data

Strategic theme 1b:
Shaping the future and gaining understanding by undertaking innovative Research and Development (R&D) projects

Aim
To innovate and maintain EDINA’s position as a leading edge data centre, providing services that users want and need, and to foresee and respond to future requirements from the community.

Objectives
Build capacity and gain understanding in EDINA, including strategic capabilities, in each business area

- Play EDINA’s part in enhancing the national infrastructure for the benefit of the academic community, and share ‘best practice’

Influence national and international agendas

- Participate in key R&D work with partners
Manage the transition of appropriate R&D projects into services

- Identify appropriate projects early and manage them appropriately

Respond to opportunities to undertake R&D projects

- Ensure that sources are monitored and opportunities taken as appropriate

Identify and create opportunities to undertake innovative work that fits within strategic goals

- Work within appropriate business development procedures

**Strategic theme 1c:**
**Gaining leverage through national and international engagement**

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**Aim**

To consolidate and improve inter-working relationships at local, national and international level to more effectively deliver services to users; and to be nationally and internationally recognised for activities undertaken.

**Objectives**

*Develop and consolidate EDINA's presence nationally and internationally as a world-class national academic data centre, working with a network of partners*

- Identify key partners and enter into partnership agreements to reach agreed strategic targets

*Attain a sustainable balance between activities EDINA undertakes for itself, and JISC's priorities, on both a regional and a sectoral basis:*

- Identify ‘spearhead’ activities into new regions and/or sectors

*Consolidate and improve existing collaborations*

- Continue to work closely with Mimas, with JISC-funded and other UK centres and initiatives, and with international partners

*Build new partnerships and collaborations*

- Continue to develop local, national and international engagement and partnerships in all strategic business areas, with Governmental, educational, standards development, research data, commercial, web services and grid development organisations
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Strategic goal 2:

To enhance EDINA’s resource base through staff talent, technology and effective management of resources

This goal summarises the second strategic area in which EDINA seeks sustainability, namely Resources and Context, the aim of which is to maximise the return on the tangible and intangible assets of the data centre, especially the reputation and ‘know-how’ of staff.

Strategic theme 2a:

Recruiting, retaining and developing a flexible complement of skilled staff, capitalising on reputation, ‘know-how’ and partnerships

Aim

To recruit, retain and develop a flexible complement of able, skilled and well-motivated staff and to capitalise on ‘know-how’ to deliver EDINA’s mission.

Objectives

Provide staff with equitable opportunities for their development, in line with University guidelines and within staff development resources available

- Ensure that staff members receive equal treatment in terms of accessing development opportunities

Empower staff to perform and succeed in their roles and recognise their success

- Recognise and reward staff through the University’s Contribution Reward scheme

Build capability by sharing and exchanging ‘know-how’ across the data centre, within Information Services and the University, with key partners such as Mimas and other JISC services, and with the outside world

- Continue to improve the internal sharing of information and foster engagement with partners and potential partners around the world
- Agree Memoranda of Understanding where appropriate

Continue to bring in and retain able, committed staff

- Keep under review recruitment methods and practices, promoting equality and diversity in the workplace and flexibility in working practices
Strategic theme 2b:
Developing and maintaining outstanding IT capability

Aim
To maintain and develop exceptional IT capability as a respected and reliable national data centre, to provide effective services that are flexible, up-to-date and functionally rich.

Objectives
Maintain and continue to effect a rolling plan of hardware upgrade and replacement to fulfil current and future service requirements and ensure scalability and robustness

- Maintain three-year rolling hardware strategies and update them annually, purchasing new or upgrade hardware as required and as funding permits

Improve service resilience and ensure business continuity

- Review annually the IT components of the detailed risk register and test selected components of the IT disaster recovery plan

Maintain a coherent and effective software strategy

- Undertake regular reviews of the software systems and methodologies in use across EDINA and regular technology horizon scanning to identify technologies and methodologies that may be applicable to current and future EDINA services

Strategic theme 2c:
Providing effective governance and management of resources

Aim
To be able to pursue EDINA’s mission as an effective and efficient national data centre

Objectives
Achieve a sustainable staffing profile

- Continue to undertake succession planning and execution to ensure that EDINA is able to function when key people leave/retire

Work within the governance structure to demonstrate effective management of resources to key stakeholders

- Planning and reporting as appropriate to Information Services, the JISC and the EDINA Management Board
- Consider, with Mimas, the establishment of a joint Stakeholder Group

Ensure that any funding opportunities that arise are considered in line with strategic goals, and resources made available to undertake the work

- Continue to use EDINA’s Business Development framework to make it easier to react quickly to opportunities

Ensure better informed business decisions

- Continue to improve management accounting systems
Monitor accommodation requirements in the light of changing staff levels and funding availability

- Re-model and adapt to suit changing circumstances

**Strategic goal 3:**

To sustain and develop a well-founded UK national academic data centre, offering value for money to the community

This goal summarises the third area in which EDINA seeks sustainability; namely, Finances and Liabilities, the aim of which is to sustain and develop a well-founded UK national academic data centre.

**Strategic theme 3a:**
Generating sufficient funding to meet strategic goals in the medium- to long-term

<table>
<thead>
<tr>
<th>Aim</th>
</tr>
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<tbody>
<tr>
<td>To obtain the funding that allows EDINA to work and meet its goals for the immediate future and for a three-to-five year timeframe.</td>
</tr>
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<table>
<thead>
<tr>
<th>Objectives</th>
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<tbody>
<tr>
<td>Maintain and diversify the funding base of the data centre to reduce risk</td>
</tr>
<tr>
<td>- Ensure that EDINA’s income is derived from a range of activities and is not reliant on any one business area</td>
</tr>
<tr>
<td>- Seek and take opportunities to apply for funding outside usual funding streams</td>
</tr>
<tr>
<td>Involve staff across the data centre in business generation, partnership and ‘watch’ activities</td>
</tr>
<tr>
<td>Seek out and take opportunities to bid for funding from a range of sources if the activity potentially funded is in line with strategic goals</td>
</tr>
<tr>
<td>- Increase income in each strategic business area and actively seek new sources of funding</td>
</tr>
<tr>
<td>Ensure that activity that crosses service boundaries is funded and resourced</td>
</tr>
<tr>
<td>- Calculate the resource required to contribute to cross-service activities and include it in budget calculations</td>
</tr>
<tr>
<td>If possible, recover Full Economic Costs from funders</td>
</tr>
<tr>
<td>- Include FEC calculations in budgets wherever possible</td>
</tr>
</tbody>
</table>
Strategic theme 3b:
Managing appropriately financial and legal liabilities

Aim
To ensure that EDINA manages its financial and legal liabilities with appropriate care.

Objectives
Meet legal and financial obligations for the staffing complement
- Ensure that EDINA has funding to meet ongoing staff payroll requirements, including pay increases and employer responsibilities
- Promote equality and diversity in recruitment processes and offer support for staff with disabilities or ill health

Meet external compliance requirements, including legal, financial and Health and Safety
- Maintain a regularly updated Risk Register, with quarterly exception reporting to JISC and annual exception reporting to the EDINA Management Board

Strategic theme 3c:
Ensuring long-term sustainability of activity, resource and finance

Aim
To provide foundations for the long-term sustainability of the data centre.

Objectives
Develop and maintain a widely-based portfolio of service and project activity that sustains EDINA into the long-term as a national academic data centre

Facilitate growth by strategic partnerships
- Agree Memoranda of Understanding where applicable
- Ensure that information arising from EDINA’s broad network of contacts is effectively exploited for business development purposes

Examine new and innovative models, including funding models, for strategic growth
- Consider how others build capacity and whether the models they use, including funding models, are appropriate for EDINA
- Explore and sustain non-grant-funded revenue streams
5.4 Main areas of activity planned

This section suggests examples of activity in EDINA’s business areas that would take the Strategy forward, given availability of funding. More detail will be defined later in EDINA’s Business Development Plan for 2011-2014.

Reading & Reference

- Cooperative work to improve ‘discovery to delivery’, to achieve greater consensus and coherence, including geo-enabling work that links the location of the ‘reader’ with convenient location of the resource
- Playing a part in any developments arising from the frameworks envisaged in the Resource Discovery Taskforce Vision & Implementation, where appropriate also with the SCONUL Shared Services Business Case
- Providing added value services on content eg shared infrastructure, providing repositories of open and community-contributed data to support the JISC IE and integration of geospatial services
- Continuing personalisation work, embedding bookmarking, commenting and resource sharing into services, implemented by providing the functionality via M2M services
- Extending options for users to obtain journal content by implementing further M2M communication with Tables of Content (ToC) services
- Embedding information facilities that ensure long-term continuing access and digital preservation

Maps & Data

- Geo-enabling services across disciplines in the JISC IE and in other business areas in EDINA
- Consolidating and maturing the academic SDI in the UK and Europe
- Providing new collections, where funding permits
- Extending services to other sectors, including Digimap for Schools
- Adapting the business model to changed circumstances, eg open and free data, and using open datasets to complement paid-for services
- Delivering services via geo-spatial mobile technologies
- Using open interoperability standards to underpin work with national and international colleagues
- Providing specialist support services

Multimedia and Education

- Providing an integrated, geo-enabled Multimedia service, offering economies of scale and value for money
- Working out how to add value to JISC-funded subscription services in a largely open market
- Investigating how to publish these services, make them meaningful, put on an editorial layer/context and demonstrate their academic utility and value
- Working out how to deal with the evidential value and provenance of materials
- Providing context by interacting with other services, text and media and engaging with major cultural content projects
EDINA Strategy 2011–2014

- Providing tools for discovery and use of content, including geospatial tools
- Reflecting third party holdings in portals
- Using innovative ways to present service content and service-related learning resources
- Building and supporting communities of practice

Learning & Teaching
- Continuing to provide, with Mimas, the national infrastructure for the sharing of educational resources
- Being regarded as a key place for communities to disseminate educational resources, and providing them with evidence that this is so
- Interoperating with other services and related resources
- Providing services that will help achieve sustainability eg resource tracking and reports of detailed usage

Middleware and Infrastructure:

M2M
- Assisting JISC in awareness raising and community building for INSPIRE and building services to exploit emerging APIs via standards awareness and tracking
- Investigating resiliency and upscaling eg via cloud computing paradigms
- Developing open web mapping services based on the open data provided by OS
- Developing the geodata portal service to have more machine interfaces for data discovery
- Develop a proxy for M2M services, so that a single target may be used for multiple service components and protocols, leading to far less configuration work for users eg library staff
- Maintaining the partnership with the Language Technology Group at the University of Edinburgh, to access the latest research developments in text mining for structured data
- Working with JANET20 on cloud services for academia, with EDINA serving as data providers, maintainers and testers
- Supporting collaboration across institutions and developing solutions for M2M interworking between service providers
- Data mining logs and databases to unearth usage patterns and adapt services to better meet real user workflows

Access Management
- Continuing to provide technical leadership in the Shibboleth development community, developing M2M authentication to ‘Shibbolised’ services
- Making a significant contribution to the security aspects of providing web services, including geospatial
- Investigating and progressing the parallels between inter-federation and inter-SDI interoperability
- Investigating the use of web interfaces that support Shibboleth authentication to issue credentials suitable for M2M interfaces

20 www.janet
• Contributing to the development of core design and Shibboleth software, including the geospatial aspects

• Ensuring the integrity of federation metadata

• Continuing to provide support for the UK federation

• Investigating user requirements to be able to offer access management support for institutions in their engagement with business and the community

For all business areas, there is an imperative to keep an active watching brief on emerging technology and functionality, continue to participate in national and international engagement, and work on keeping costs to a minimum to provide value for money to the academic community.
Appendix One: Strategic fit and stakeholders

Fit to strategies of parent organisations

EDINA’s strategy is directly aligned with the following strategic statements of its parent organisations. Appendix Two gives details of how EDINA’s strategic goals and themes are aligned with the strategic plans of its parent bodies.

The University of Edinburgh Strategic Plan 2008 – 2012

EDINA’s goals and operational priorities are aligned with the University of Edinburgh’s core strategic goals: ‘Excellence in education; Excellence in research; and Excellence in commercialisation and knowledge exchange’. These goals are underpinned by three cross-cutting supporting goals: ‘Quality people; Quality services; and Quality infrastructure.’ In addition, a number of operational priorities have been identified that shape the University’s approach to the achievement of goals. Of particular importance to EDINA are: ‘Building strategic partnerships and collaborations’ and ‘Promoting equality, diversity, sustainability and social responsibility’.

Edinburgh Global, the University of Edinburgh Internationalisation Strategy

The overarching priority of the University of Edinburgh’s Internationalisation Strategy is stated by the Principal to be, ‘... to further enhance our global presence. ... based in Scotland’s capital, ... our reach and aspirations are international and it is in that context we must be measured’. EDINA, too, works at both national and international levels and will play its part in Key Actions 4 – 6 of the Internationalisation Strategy.

JISC Strategy, 2010-2012

EDINA’s Strategy is aligned with JISC’s Strategy, which in turn is aligned with the priorities and strategies of its Funding Partners.

The main Priority Investment Area in which EDINA works is: ‘Cost-Effective Shared National Services - JISC will continue to invest in the development and updating of its current service provision in order to increase its efficiency and effectiveness and further develop its processes to ensure that services remain relevant to JISC’s strategic aims, can maximise impact and value to its users, have an appropriate degree of innovation and deliver exceptional value for money at an affordable cost. - Ongoing investment in JISC’s infrastructure (or Information Environment) will continue and innovation programmes will help to establish the priorities for a large-scale, national infrastructure with multiple content and service providers.’

EDINA works in many of the investments proposed under this, and the other, Priority Investment Areas. In the ‘How JISC Invests’ section, their Strategy states that: ‘JISC works through a small number of key organisations to deliver infrastructure and resources. Its major delivery partners are JANET UK, JISC Collections, JISC Advance, the British Universities Film and Video Council (BUFVC), the Regional Support Centres and the two national JISC data centres, EDINA and Mimas at the universities of Edinburgh and Manchester.’

21 [www.planning.ed.ac.uk/strategic_planning/SP2008-12/index.htm](http://www.planning.ed.ac.uk/strategic_planning/SP2008-12/index.htm)
22 [www.ed.ac.uk/staff-students/staffglobal](http://www.ed.ac.uk/staff-students/staffglobal)
23 [www.jisc.ac.uk/aboutus/strategy/strategy1012.aspx](http://www.jisc.ac.uk/aboutus/strategy/strategy1012.aspx)
24 [www.jisc.ac.uk/aboutus/whoweare.aspx](http://www.jisc.ac.uk/aboutus/whoweare.aspx)
Knowledge Exchange

Knowledge Exchange is a co-operative effort that supports the use and development of Information and Communications Technologies (ICT) infrastructure for higher education and research. Partners in the Knowledge Exchange are:

- JISC
- Danish Electronic Research Library (DEFF)
- German Research Foundation (DFG)
- SURF Foundation, Netherlands.

Knowledge Exchange was originally set up in 2005 for three years. Its goal was to make a layer of scholarly and scientific content openly available on the internet. Its vision statement had four priorities: to build an integrated repository infrastructure; to explore new developments in the future of publishing; to facilitate integrated management services within educational and research institutions; and to support the European digital libraries agenda.

It has been decided to continue the partnership into a period of new tasks that would focus on areas such as Virtual Research Environments, Primary Research Data and the relationship between national and European IT-infrastructure policies. EDINA is working in all three areas.

The E-Framework for Education and Research

The E-Framework for Education and Research is an international initiative that provides information to institutions on investing in and using information technology infrastructure. It advocates service-oriented approaches to facilitate technical interoperability of core infrastructure as well as effective use of available funding. The e-Framework was initially established by JISC and Australia’s Department of Education, Employment and Workplace Relations (DEEWR), formerly the Department of Education, Science and Training (DEST). The New Zealand Ministry of Education (NZMoE) and the Netherlands SURF Foundation (SURF) joined in 2007. EDINA is participating in a number of e-Framework activities and has been invited by JISC to undertake the mapping of geospatial standards to the E-Framework for Education and Research, work that has commenced with JISC’s Australian and New Zealand partners.

JISC Services Strategy

EDINA's strategic goals are also aligned with key JISC policies, such as the JISC Services Strategy.

Paragraph 21: ‘The JISC will establish monitoring and reporting mechanisms for its Services and service providers which are proportionate to the scale of operations, with the appropriate balance between the obligation of the service provider to fulfil JISC aspirations and the need for the service provider to have a degree of autonomy and flexibility in the way it manages its operations’.

JISC Collections Corporate Plan 2010-2011

JISC Collections is a membership organisation, established by the UK HE and FE funding councils, to support the procurement of digital content for education and research in the UK. It is a mutual trading company and a JISC service overseen by a Board of Management.

EDINA works closely with JISC Collections and the two organisations have signed a Memorandum of Understanding. EDINA’s Strategy is aligned with JISC Collections’ Corporate Plan, in which the data centres are mentioned twice:

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25 www.knowledge-exchange.info/  
26 www.e-framework.org/  
28 www.jisc-collections.ac.uk/Publications/Corporate-Plan/
Strategic Aim 4, page 6: To deliver value-added digital content to our members. Critical success factor; ‘Developing new partnership models with JISC and the national data centres to ensure effective delivery of centrally procured e-resources.’

Partnership Working, page 2: ‘We also need to develop new ways of working with the organisations that are closest to us, including JISC and the national data centres, and in doing so seek to understand their expectations and consider their views when developing and implementing our own strategies.’

Stakeholders’ strategies

There is a wider set of stakeholders whose strategies have some importance for EDINA. Two, the Economic and Social Research Council (ESRC) and the European Union, provide grant funding for some activities. Others have impact on EDINA’s parent bodies and therefore indirectly on EDINA. The main points of their strategic statements that have relevance to EDINA are given below.

UK Location

UK Location is a UK pan-government initiative to improve the sharing and re-use of public sector location information. It was established after the publication of the UK Location Strategy and brings together the implementation of the Strategy with the EU’s INSPIRE Directive (see below). The UK Location Programme is a multi-year programme of work, led by the Location Council with DEFRA as the lead Government Department.

Place Matters: The Location Strategy for the United Kingdom

The objective of the Location Strategy for the United Kingdom is to maximise the value to the public, government, UK business and industry of geographic information. It will provide a consistent framework to assist national, regional and local initiatives and service delivery.

The UK Location Strategy is very important to EDINA for its Geospatial business area. ‘Public Sector/Government information suppliers will be expected to produce location information that is consistent and compliant with accepted standards, allowing the seamless joining up of information … Information will be collected once and shared and used many times.’ Each public sector body will be expected ‘… to ensure that its IS/IT strategy and work programme describe clearly its policies and implementation plans for location data systems’.

Re-mapping the future for Ordnance Survey – making public data public

On 17 November 2009, the Prime Minister and Communities Secretary announced that the OS would open up its data relating to electoral and local authority boundaries, postcode areas and mid-scale mapping from April 2010. A public consultation exercise, ending in March 2010, was also announced. EDINA made a submission to the consultation. The plans for ‘OS Free’ are of great importance to EDINA.

European Union: Europe 2020 and the INSPIRE Directive

1. The European Commission launched the Europe 2020 Strategy on 3 March 2010, to boost the economies of Europe and prepare for the coming decade. It identifies ‘… three key drivers for growth, to be implemented through concrete actions at EU and national levels: smart growth (fostering knowledge, innovation, education and digital society), sustainable growth (making our production more resource efficient while boosting our competitiveness) and inclusive growth (raising participation in the labour market, the acquisition of skills and the fight against poverty).’ One of the key targets is that 3% of the EU’s GDP will be invested in research and development by 2020.
3. Directive 2007/2/EC of the European Parliament and of the Council, establishing an Infrastructure for Spatial Information in the European Community (INSPIRE), is significant for EDINA's geo-spatial services. Paragraph (3) of the preamble states that, 'The problems relating to the availability, quality, organisation, accessibility and sharing of spatial information are common to a large number of policy and information themes and are experienced across the various levels of public authority. Solving these problems requires measures that address exchange, sharing, access and use of interoperable spatial data and spatial data services ... An infrastructure for spatial information in the Community should be established'.

Public authority is defined as, 'Any government or any other public administration, including public advisory bodies, at national, regional or local level'. Public authorities include universities working in the area of geo-spatial provision and therefore INSPIRE has relevance for EDINA.

One Scotland – One Geography: A Geographic Information Strategy for Scotland

This strategy ‘... sets out a proposed approach to the more systematic and effective use of geographic information in the development and delivery of policy and services to the benefit of the people of Scotland’. This strategy is of significance for EDINA's geo-spatial services and our staff participate in the Scottish Executive’s Geography Technical working group.

Research Councils UK (RCUK) Synthesis of Strategies

RCUK published a synthesis of the strategies of the UK Research Councils in November 2003, with a view to ‘... developing an overarching vision for the direction of the Councils' research over the next 10 to 20 years'. This document states that, ‘Increasingly, the driver for determining priorities is more a cross-Council collaborative analysis of the research panorama and less the specific viewpoint of a single Council’. Among other RCUK priorities are the following: promotion of the value of discovery as a spur to understanding and new thinking; the effective dissemination of research results; increasing the effectiveness and productivity of UK research in the delivery and exploitation of ‘grid’ technologies; and building national capability in data collection and management.

Research Councils UK (RCUK) Delivery Plan 2008/09 – 2010/11

The plan has been updated for 2009-2010 and among its objectives are to coordinate the delivery of multidisciplinary research in six areas, including the ‘Digital economy’ and ‘Living with environmental change’. In the former, funding will be concentrated upon areas in which ‘... the management and presentation of information can have maximum impact: healthcare, transport and the creative industries'; and in the latter, RCUK aims to provide ‘... the best information to enable sustainable management and protection of vital ecosystem services’. The RCUK also aims to provide access to world class research facilities, promote the sustainability of the UK research base and encourage international collaboration.

ESRC Strategic Plan 2009 - 2014

One of the new Plan's Strategic Objectives is ‘Impact through Infrastructure' and the ESRC states that a major priority is to, ‘... ensure that our data strategy is underpinned by a commitment to provide safe and secure access not only to all of our data resources but also those provided by other organisations'. Another is 'Impact through Skilled People' and the ESRC states that a priority is to ‘... reduce supply side skill and research capacity deficits'.

Research Information Network Business Plan 2008 - 2011

The plan notes (page 2) that the pace of change is quickening and that, ‘New services and behaviours, including those commonly referred to under the heading of Web 2.0, will have profound implications for researchers, institutions and funders, as well as current service providers’. The core aims of the plan are to develop the evidence base, provide authoritative advice and guidance, and promote change.

34 www.scotland.gov.uk/Publications/2005/08/31114408/44098
35 www.rcuk.ac.uk/aboutrcuk/publications/corporate/synthstrategies.htm
36 www.rcuk.ac.uk/aboutrcuk/deliveryplan.htm
37 www.esrcsocietytoday.ac.uk/ESRCInfoCentre/Images/Strategic32oPlan32oFINAL_tcm6-32704.pdf
38 www.rin.ac.uk/about/business-plan

RLUK, formerly CURL, is a membership organisation of the UK’s biggest research libraries, including Edinburgh University Library. EDINA participates directly in one of RLUK’s key strategic themes, ‘Resource discovery and delivery’, partnering with Mimas in work to provide discovery to delivery of Scholarly Communication resources.

UK Research Data Service (UKRDS)

UKRDS is a joint project between RLUK and RUGIT (the Russell Group IT Directors Group). It is funded by HEFCE (the Higher Education Funding Council for England) under its Shared Services programme, with support from JISC. The Interim Project has recommended (June 2010):

I. developing a process for embedding the skills and infrastructure for data management within the operational structure of HEIs, to be trialled at the Pathfinder Universities of Bristol, Leicester and Oxford;

II. extending the capability of the DCC to provide support and advice nationally by the provision of tools, training materials, best practice guidance, advocacy and physical infrastructure capacity planning;

III. developing a data management plan registration process within institutions to support continuing curation and discovery of data resulting from research.

Higher Education Academy (HEA) Strategic Plan 2008-2013

The HEA plan has five strategic aims: ‘Identify, develop and disseminate evidence-informed approaches; Broker and encourage the sharing of effective practice; Support universities and colleges in bringing about strategic change; Inform, influence and interpret policy; and Raise the status of teaching.’

EDINA works with the HE Academy and Mimas in the repository service provided to collect and present educational materials created by the community.

39 www.rluk.ac.uk/node/480
40 www.ukrds.ac.uk/
41 www.heacademy.ac.uk/assets/York/documents/aboutus/Academy_2008-13_Strategic_Plan.pdf
Appendix Two: Alignment with strategies of parent organisations

Strategic Goal 1: To provide added value, high quality services, leveraged by R&D, enhancement activity and engagement with others

Strategic Theme 1a: Providing a managed portfolio of added value, high quality services

JISC Strategy 2010-2012:

Objective One: ‘Provide cost-effective and sustainable shared national services and resources’; Objective Two: ‘Help institutions to improve the efficiency and effectiveness of corporate and business systems in universities and colleges’; Objective Three: ‘Help institutions to improve the quality of learning and teaching and the student experience’; Objective Four: ‘Help institutions to improve the quality, impact and productivity of academic research’.

How JISC Invests – Content delivery and expertise (page 25): ‘JISC will use its three main content delivery providers, EDINA, Mimas and BUFVC, to maintain a range of services that acquire, add value and improve access to specialist or new types of content... The service providers will deliver content and offer advice... They will promote innovative types of research or teaching... The providers will seek opportunities to join up individual services... They will each develop mechanisms to create and maintain links with teachers, learners and researchers, through stakeholder groups and user forums... They will continuously develop their software applications through better location tools, customer-focused and innovative interfaces and effective support and training.’

Impact: Measuring Success (page 33): ‘JISC will measure success using a mixture of qualitative and quantitative methodologies... [it] will adopt an approach to describing its impact and progress through narrative... rather than by trying to quantify the collective impact of its activities. None the less, where certain activities have substantial impact, this will be reported for these activities.’

JISC Collections Corporate Plan 2010-2011:

Strategic Aim 4, page 6: ‘To deliver value-added digital content to our members.’

Critical success factor: ‘Developing new partnership models with JISC and the national data centres to ensure effective delivery of centrally procured e-resources.’

University of Edinburgh Strategic Plan 2008-2012:

Enabler: Quality Services. Aim: ‘To deliver efficient and timely services that are customer-focused and of world-class quality’.

Enabler: Quality Infrastructure. Objectives include: ‘Acquire, create, preserve and curate information to support learning, teaching, research and management’.

Strategic Theme 1b: Shaping the future and gaining understanding by undertaking innovative R&D projects

JISC Strategy 2010-2012:

Innovation Programmes (page 27): ‘Together these activities deliver the following: i. Continual enhancement of national infrastructure to support the activities of institutions; ii. Enhanced capacity, knowledge and skills in the sector to enable positive and informed change; iii. Guidance to the sector on...’
‘best practice’ models for using technology at departmental, institutional, regional or national levels; iv. Strategic leadership to the sector and others bodies in specialist areas and the influencing of national and international agendas.’

University of Edinburgh Strategic Plan 2008-2012:

*Strategic goal:* Excellence in research.  *Aim:* ‘To build on our standing as one of the world’s leading research-intensive institutions; to be a vibrant research community that stimulates new ideas and discoveries; and to contribute to the economic, social, cultural and environmental development of Scotland and the world’.

**Strategic Theme 1c: Gaining leverage through national and international engagement**

JISC Strategy 2010-2012:

Partners (page 30): ‘JISC maximises its investment by working through partnership and collaboration ... JISC will prioritise those partnerships that: i. Leverage JISC influence over important issues such as standards and policy at national, international and global levels; ii. Support effective delivery of the JISC Strategy; iii. Join up activities of the multiple organisations and agencies working towards world-class effectiveness of UK education and research; iv. Promote good practice and understanding across all of education and research.’

University of Edinburgh Strategic Plan 2008-2012:

*Enabler:* Quality People.  *Objectives include:* ‘Develop a strong international focus and awareness in all of our staff’.

*Strategic theme:* Building strategic partnerships and collaborations.  *Aim:* ‘To generate added value from strategic partnerships and collaborations’.

Edinburgh Global, University of Edinburgh Internationalisation Strategy 2008-2012:

*Key Actions:* ‘4 – We will focus on building strategic partnerships in a focused number of countries or regions; 5 - We will secure a greater volume of resources from international research partnerships and increase the use of our intellectual property worldwide; 6 – We will continue to develop a strong international focus and awareness in all our staff and in all that we do’.

**Strategic Goal 2: To enhance our resource base through staff talent, technology and effective management of resources**

**Strategic Theme 2a: Recruiting, retaining and developing a flexible complement of skilled staff, capitalising on reputation, ‘know-how’ and partnerships**

University of Edinburgh Strategic Plan 2008-2012:

*Enabler:* Quality People.  *Aim:* ‘To equip staff to realise their full potential as direct contributors to the success of the University’.  *Objectives include:* ‘Recruit, reward, develop and retain high-performing staff; embed a positive performance culture which encourages and recognises success; support staff in ways that promote and sustain positive, productive and safe work environments’.

*Strategic theme:* Promoting equality, diversity, sustainability and social responsibility.  *Aim:* ‘To embed equality, diversity, sustainability and social responsibility as fundamental principles, and assist all staff and students to realise their full potential’.
Strategic Theme 2b: Developing and maintaining outstanding IT capability

JISC Strategy 2010-2012:

How JISC Invests – Content delivery and expertise (page 25): ‘The [JISC content delivery] providers will configure the underlying infrastructure delivering ... services to ensure scalability, robustness and resilience.’

University of Edinburgh Strategic Plan 2008-2012:

Enabler: Quality Infrastructure.  
Aim: ‘To provide a modern, efficient and stimulating working and learning environment to sustain world-class academic and support activities’.  
Objectives include: ‘Ensure that our equipment and IT infrastructure is modern, well maintained and put to good use; have the resource capability to invest in our infrastructure in sustainable ways’.

Strategic Theme 2c: Providing effective governance and management of resources

JISC Strategy 2010-2012:

How JISC Invests – Governance (page 23): ‘JISC will ensure that appropriate and effective governance arrangements are in place for all service providers and will review these from time to time to assure itself that its funding is being managed efficiently and with appropriate levels of scrutiny. All service providers will be required to have an effective Board structure, financial management systems and suitable channels for acquiring user input to inform strategic and operational planning, normally through a Stakeholder Group.’

JISC Services Strategy:

Paragraph 21: ‘The JISC will establish monitoring and reporting mechanisms for its Services and service providers which are proportionate to the scale of operations, with the appropriate balance between the obligation of the service provider to fulfil JISC aspirations and the need for the service provider to have a degree of autonomy and flexibility in the way it manages its operations’.

University of Edinburgh Strategic Plan 2008-2012:

Enabler: Quality People.  
Objectives include: ‘Support and cultivate an ethos of high-quality leadership and management; achieve a sustainable and diverse staffing profile which meets the University’s needs’.

Enabler: Quality Services.  
Objectives include: ‘Promote professional development and responsible resource management; utilise our professional expertise; streamline and standardise processes wherever possible’.

Enabler: Quality Infrastructure.  
Objectives include: ‘Have the resource capability to invest in our infrastructure in sustainable ways’.

Strategic Goal 3: To sustain and develop a well-founded UK national academic data centre

Strategic Theme 3a: Generating sufficient funding to meet strategic goals in the medium-long term

University of Edinburgh Strategic Plan 2008-2012:

Enabler: Quality Infrastructure.  
Objective: ‘Have the resource capability to invest in our infrastructure in sustainable ways’.  
Strategies to achieve objectives: ‘Generating surpluses for reinvestment; securing investment from external sponsors’.
Strategic Theme 3b: Managing appropriately financial and legal liabilities

JISC Strategy 2010-2012:

How JISC Invests – Governance (page 23): ‘JISC will ensure that appropriate and effective governance arrangements are in place for all service providers and will review these from time to time to assure itself that its funding is being managed efficiently and with appropriate levels of scrutiny.’

University of Edinburgh Strategic Plan 2008-2012:

Enabler: Quality Infrastructure. Objectives include: ‘To be responsive to technological, legal and regulatory change’.

Strategic theme: Promoting equality, diversity, sustainability and social responsibility. Objectives include: ‘Comply with and, where possible, exceed the requirements of relevant legislation’.

Strategic Theme 3c: Ensuring long-term sustainability, of activity, resource and finance

University of Edinburgh Strategic Plan 2008-2012:

Enabler: Quality Infrastructure. ‘We are playing a leading role in knowledge management in the UK ... by hosting the EDINA national data centre to deliver and develop online services for UK universities, research institutions and further education colleges.’

Strategic theme: Promoting equality, diversity, sustainability and social responsibility. Objectives include: ‘Incorporate equality, diversity, sustainability and social responsibility perspectives into all our activities’.