



Strategy 2012–2015

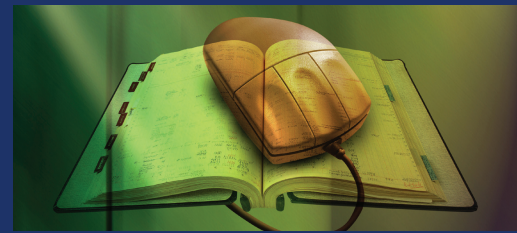


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Introduction

This Strategy provides justification for the trust and investment placed in EDINA as a national academic data centre by the UK funding bodies for education and research; by universities, colleges and schools; and by a wide range of national bodies.

The University of Edinburgh, our parent body, offers a critical mass of expertise and resource to the academic community, from which it is able to gain leverage.

EDINA continues to develop close and effective partnerships with funding bodies, institutions, and national and international groups - governmental, educational, and commercial - that support research and education.

We recognise the imperative in the light of current economic conditions to tell our 'success stories', demonstrate our impact, and be pro-active in taking forward the benefits of innovation to enhance productivity and quality in research and education.

Stakeholder analysis has indicated that, in addition to our role in developing and delivering key online services, EDINA is regarded as:

- A centre of expertise in shared services and infrastructure for research and education in the UK
- An international centre of expertise for Geospatial services and infrastructure
- An international centre of expertise for Access Management infrastructure
- An international centre of expertise for continuity of access to scholarly resources

Vision

To be integral to increasing the quality and productivity of research and education in the UK and beyond.

Mission Statement

We develop and deliver shared services and infrastructure for research and education that are innovative, high quality and cost-effective, based upon knowledge and expertise gained through research and development

Values

- **Innovation** for the benefit of research, education and the wider society
- **Engagement** with stakeholders, users and partners, nationally and internationally
- **Expertise** and **Understanding** gained from the deployment of staff and technology in one of the world's leading research and teaching Universities
- **Trust** deriving from a record of honest performance, being of and for the research and education sector which we serve
- **Excellence** in our work and the work of others

Context

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 is based at the University of Edinburgh, with offices there and in Cheshire.

The most significant change in the external landscape for EDINA since the publication of its last Strategy has been the Wilson Review of JISC, coinciding with Government response to public debt, renewed focus upon the impact of funded research, and changed institutional financing.

Our shared services are based upon the knowledge and understanding of the application of ICT to the requirements of our community. They are enablers for cost cutting and efficiency, with continued focus on quality and productivity. As a trusted provider of shared content and infrastructure services, EDINA will deliver on the strategic purposes of JISC in supporting the sector, providing shared services 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.

JISC is in the process of changing to a simplified structure for the activities for which it is responsible. It is reshaping its governance and processes in order to have effective policy control over “its own staff, its companies and the activities of JISC-funded services in institutions” (Professor David Baker, Chair of JISC’s Transition Group). EDINA will continue to align itself with the strategic objectives of its two principal stakeholders, JISC and the University of Edinburgh, but must also reflect on how it remains relevant and viable in these new circumstances. Through greater engagement with clients and institutional stakeholders, EDINA must ensure appropriate partnerships and relationships in and around the new JISC, and widen its funding base to provide for sustainability.

Strategic Aims and Objectives

1. Activity and Value Proposition

To develop and deliver shared services and infrastructure that are essential to the functions of the research and education sectors on behalf of JISC, the University of Edinburgh, UK Higher and Further Education Institutions, and related bodies such as the UK Research Councils

- 1.1 Shaping the future through the uptake of valued services based on innovative research and development
- 1.2 Ensuring ease and continuity of access to the resources needed in research and education
- 1.3 Reaching out actively to listen to our clients, customers and consumers
- 1.4 Contributing to the transfer of knowledge, ideas and expertise towards influencing and realising societal benefits, both economic and cultural
- 1.5 Gaining leverage through national and international engagement

Outcomes

- 1A Improved understanding, materialised as innovative tools, facilities and research reports
- 1B Sustainable quality assured, cost effective services and development as an integral part of the academic infrastructure in the UK and internationally

- 1C Improved engagement and continued high quality outreach and support services for institutions, end users and support staff
- 1D National and international recognition as a world-class national academic data centre, working with a network of partners, under policy control of JISC and its stakeholders

2. Resources and Context

To enhance our resource base through talent, technology and effective management

- 2.1 Building business capability in order to deploy and share our expertise, including the recruitment of talented, skilled and motivated staff
- 2.2 Understanding and deploying new technological developments to develop and maintain outstanding IT capability
- 2.3 Operating a cost-effective, efficient and supportive organisation that prioritises quality and value for the knowledge and services that we produce

Outcomes

- 2A Flexible complement of able, skilled and well-motivated staff sharing expertise with each other, the University, key partners and the outside world
- 2B Delivery of relevant services which are scalable, robust and reliable
- 2C Valued and respected by JISC, the University and key stakeholders as an effective and efficient national data centre

3. Finance and Sustainability

To ensure our sustainability into the long-term

- 3.1 Capitalising on the excellent reputation of our staff and their product
- 3.2 Facilitating understanding and healthy growth by strategic partnerships
- 3.3 Securing resources and finance for activity, including succession planning
- 3.4 Prioritising diversification of income streams over the next 3 years
- 3.5 Determining our “2020 Vision”

Outcomes

- 3A Greater national and international recognition of the expertise of our staff and ongoing business generation
- 3B Sustainable data centre based on strategic partnerships, with income derived from a range of activities and funders
- 3C A robust medium to long-term strategy to shape our future, gaining leverage from:
 - 1) Changes in UK research and education community, including the “new JISC”
 - 2) Changes in the political and economic landscape
 - 3) The strategic objectives of the University of Edinburgh
 - 4) National and international roles and responsibilities
 - 5) Opportunities from changing information technologies

Priority Activity Areas

The following are priority areas for activity in line with JISC strategic objectives:

- Ensuring ease and continuity of access to the resources needed for scholarly activity, including:
 - Mobile internet
 - Contributing to UK Discovery
 - Long-term preservation
- Initiating and managing infrastructure for research outcomes, including:
 - UK RepositoryNet+ for research literature and related materials
 - Leadership in the creation and improvement of the UK Spatial Data Infrastructure (SDI), with the UK Location Council, and towards an academic SDI in Europe
 - ‘Geo-enabling’ services across the JISC Information Environment
 - Assisting UK universities to understand their obligations and opportunities under the EU INSPIRE regulations
 - Support for the UK Access Management Federation for Education and Research, with authoritative middleware, providing technical support and tools for members, including schools
- Consolidating and improving upon existing collaborations, and building new partnerships

Appendix: Alignment with strategies of parent organisations

1: Activity and Value Proposition

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.”

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.”

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.”

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 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”.

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”.

2: Resources and Context

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”.

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”.

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”.

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.”

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.”

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”.

3: Finance and Sustainability

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”.

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”.

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”.

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.”

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