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ENUMERATE

Thematic Survey Schedule

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1 Introduction and overview

The work of ENUMERATE is centred on three surveys, which will be rolled out during the three years of the project. In the first year (early 2012), the focus was on a high level survey (Core Survey 1), as recommended by the Numeric Study Report, on which ENUMERATE builds its activities.

In the second year of the project a Thematic Survey will take place, dedicated to the four main topics that ENUMERATE addresses:

- Size of digital heritage collections;
- Costs of digitisation of cultural heritage;
- Use of digital heritage;
- Digital preservation.

While the Core Survey is of a quantitative nature, the Thematic Survey will focus on qualitative assessments and methodology development, especially for Core Survey 2, since in the third year the Core Survey will be repeated, in order to create a reliable baseline of intelligence about digitisation of cultural heritage in Europe.

This deliverable describes the overall Thematic Survey schedule, i.e. the interrelated activities, scheduled in time, that are necessary to collect the information as indicated in the Description of Work. It must ensure that the Thematic Survey rollout is completed effectively.

The Thematic Survey will run from November 2012 to February 2013. After that a report summarising the sub-studies will be prepared, the deadline for this is the end of March 2013. Data collected in the Thematic Survey will be published on the ENUMERATE Website. This is scheduled for April 2013. The schedule for earlier activities is based on these deadlines.

The main parties involved in running the Thematic Survey are: heritage institutions; National Coordinators; Panteia (the contracted partner); the ENUMERATE Team (in particular the Core Group: CT, DEN, Digibis, and SPK); and the ENUMERATE Thematic Network as a whole

2 Schedule

2.1 Overall activities (October–November 2012)

The Thematic Survey will not be a single questionnaire distributed among a large group of cultural heritage institutions simultaneously. For each theme and sub-study specific heritage organisations will be selected and approached to collaborate with the ENUMERATE team and national coordinators in the various EU member states. To make it easier to collect information, and to build up a reliable database of heritage organisations, in every part of the Thematic Survey equally structured information will be collected, preferably with the direct involvement of the National Coordinators. In essence the data collected will be the ‘scene setting’ data that were also collected in the NUMERIC and ENUMERATE Core Surveys (e.g. name of institution, and contact person).

In the Thematic Survey, much will depend on the commitment of the National Coordinators. The ENUMERATE Team will make efforts to create an environment of involvement through consulting the National Coordinators about the themes they think can best be studied in their respective countries and about institutions in their countries that can be invited to participate in the Thematic Survey.

Schedule of activities

Activity	Start date	Due date	Actor
Contact database design and construction	01/09/2012	01/11/2012	DEN, Digibis, Panteia
Involving the National Coordinators (Nat Coords)	15/10/2012	15/11/2012	DEN, Panteia
Selecting and proposing institutions	15/11/2012	15/12/2012	Nat Coords
Processing input from the Nat Coords	01/11/2012	31/12/2012	Panteia

2.2 Theme 1: Size of digital collections (September 2012–February 2013)

The purpose of this part of the Thematic Survey is both to check and review data collected in Core Survey 1 and to further develop the methodology of quantifying the size and growth of digital collections in sufficient detail. This survey module will take on board the recommendations from the specialist meeting, held in The Hague on 30 January 2012. The focus will be on improving the problematic ‘optional table’ in Core Survey 1. We will do this by applying three research methods. Approximately 7 countries will be involved in this part of the survey. In each country about 10-15 heritage institutions will be approached that will be asked to compare three ways of measuring the size of collections:

- a. Measuring collection size and composition based on the records in collection management systems;
- b. Detailed measuring in the three most important digital sub-collections of institutions;
- c. High level, estimate-based measuring, using an improved version of the questions in the ENUMERATE Core Survey.

Schedule of activities

Activity	Start date	Due date	Actor
Theme 1A (digital collections) methodology	01/09/2012	30/11/2012	DEN, Panteia
Theme 1B (3 primary collections full data) methodology	15/10/2012	30/11/2012	DEN, Panteia
Theme 1C (Core Survey &) methodology	15/10/2012	30/11/2012	DEN, Panteia
Theme 1 desk research: check Core Survey data	29/10/2012	30/11/2012	DEN
Theme 1 guidance materials	16/11/2012	07/12/2012	DEN
Theme 1 translations	26/11/2012	07/12/2012	Nat Coords
Theme 1 selecting institutions	26/11/2012	14/12/2012	Nat Coords
Theme 1A-C online survey construction	17/12/2012	04/01/2013	Panteia, Digibis
Theme 1A-C survey announcing	31/12/2012	11/01/2013	Nat Coords
Theme 1A-C survey	07/01/2013	01/02/2013	Panteia
Theme 1 urging non-responders to respond	28/01/2013	01/02/2013	Nat Coords
Theme 1 cleaning/analysing questionnaires	28/01/2013	08/02/2013	Panteia
Theme 1 data analysis	04/02/2013	01/03/2013	Panteia
Theme 1 interim report	25/02/2013	01/03/2013	Panteia, Digibis

2.3 Theme 2: Cost of digitisation (October 2012–February 2013)

In this part of the Thematic Survey a method will be developed in order to get more detailed information on the cost of digitisation than could be collected through the questions in Core Survey 1 (refer to question 27 of the Core Survey questionnaire). In the specialist meeting devoted to the cost of digitisation (London, 30 March 2012) it was suggested that a workflow approach, *Activity Based Costing*, should be the basis for the Thematic Survey. The steps consist broadly speaking of:

1. Designing a workflow on paper;
2. Testing it on a small group of heritage institutions;
3. Making improvements to the initial design;
4. Test among a larger sample of institutions.

Schedule of activities

Activity	Start date	Due date	Actor
Theme 2 workflow methodology development	08/10/2012	30/11/2012	DEN
Theme 2 selecting test case inst.	19/11/2012	30/11/2012	Nat Coords
Theme 2 workflow test cases	3/12/2012	28/12/2012	Panteia, Nat Coords
Theme 2 urging non-responders	21/12/2012	28/12/2012	Nat Coords
Theme 2 workflow synthesis	17/12/2012	04/01/2013	DEN
Theme 2 workflow survey	07/01/2013	01/02/2013	Panteia, Nat Coords
Theme 2 urging non-responders	28/01/2013	01/02/2013	Nat Coords
Theme 2 cleaning & analysing	04/02/2013	15/02/2013	Panteia
Theme 2 data analysis	11/02/2013	01/03/2013	Panteia
Theme 2 interim report	25/02/2013	01/03/2013	Panteia, Digibis

2.4 Theme 3: Use of digital heritage (September 2012–February 2013)

Here the purpose is to improve and specify the questions related to accessing digital collections in the Core Survey. After the specialist meeting in Madrid (6th June 2012) essentially two approaches to monitoring access, use and impact of digital collections stand out. In one approach monitoring access is realised using a more or less extensive questionnaire, to be distributed among a sample of institutions. A drawback of this way of monitoring is that institutions are expected to have the data at hand, which is often not the case, and are willing to fill in an extensive questionnaire. The other approach is doing some sort of action research, i.e. working together with an institution in order to improve internal evaluation procedures. The activities scheduled in the Thematic Survey aim at a combination of both approaches.

In the first part, the questionnaire approach, the ENUMERATE team will select 30 institutions from a restricted number of EU member states (3 to 5), representative of the different institution types identified in the previous ENUMERATE and NUMERIC surveys. These institutions will be asked to participate in a thorough review of the Core Survey and other access related questions (based on work done by other surveys), with special attention to the usefulness of the questions and the feasibility of answering them.

In the action research approach either the same institutions or another sample (to be determined) will be asked to monitor a particular stream of digital collection information, viz. web traffic. Institutions will be asked to install web analytics software (probably Google Analytics) and monitor during a fixed period of time a small number of standard indicators. The museum sector has seen web analytics initiatives in recent years. ENUMERATE will especially do research on cross-sector monitoring. In this part of the Thematic Survey ENUMERATE seeks collaboration with partners in existing web analytics projects, such as *Museum Analytics* or *Culture24*.

Schedule of activities

Activity	Start date	Due date	Actor
Theme 3 (digital collections) methodology	01/09/2012	30/11/2012	DEN, Panteia
Theme 3 desk research: core survey data check	05/11/2012	30/11/2012	DEN
Theme 3 guidance materials	16/11/2012	07/12/2012	DEN
Theme 3 translations	26/11/2012	07/12/2012	Nat Coords
Theme 3 selecting institutions	26/11/2012	14/12/2012	Nat Coords
Theme 3 online survey construction	17/12/2012	04/01/2013	Panteia, Digibis
Theme 3 survey announcing	31/12/2012	11/01/2013	Nat Coords
Theme 3 survey	07/01/2013	01/02/2013	Panteia
Theme 3 urging non-responders	28/01/2013	01/02/2013	Nat Coords
Theme 3 cleaning & analysing	28/01/2013	08/02/2013	Panteia
Theme 3 data analysis	04/02/2013	01/03/2013	Panteia
Theme 3 data analytics feasibility/ methodology	03/12/2012	25/01/2013	DEN, [partner]
Theme 3 analysis analytics data	28/01/2013	01/03/2013	DEN, [partner]
Theme 3 interim report	25/02/2013	01/03/2013	Panteia

2.5 Theme 4: Digital Preservation (September 2012–February 2013)

Monitoring digital preservation policies and practice is an activity that is still relatively new to the cultural heritage field. Therefore the ENUMERATE team has decided, in consultation with a group of specialists that met in The Hague on 5 October 2012 to focus on the development of a small but balanced set of survey questions.

The approach will be a combination of desk research, the consultation of a focus group on the topic, and a synthesis of outcomes. The ENUMERATE team has experienced that the need to monitor digital preservation in the domain of cultural heritage is emerging in several places. Realising synergy with other plans and projects will be part of the activities. The main activity, the focus group session, is scheduled in the month of January 2013.

Schedule of activities

Activity	Start date	Due date	Actor
Theme 4 desk research	01/09/2012	30/11/2012	DEN
Theme 4 methodology development	15/09/2012	30/11/2012	DEN, Panteia
Theme 4 brainstorm session topics	05/10/2012	05/10/2012	DEN, Panteia
Theme 4 selecting participants	29/10/2012	16/11/2012	DEN
Theme 4 preparation focus group	10/12/2012	04/01/2013	DEN, Panteia
Theme 4 focus group	-	18/01/2013	DEN, Panteia
Theme 4 focus group report	21/01/2013	01/02/2013	Panteia

2.6 Final report and publication of survey data (March 2012–July 2013)

The Thematic Survey report must be compiled on the basis of the four sub reports discussed above. It is the second report in a series of ENUMERATE publications: Statistical Monitoring of Digitization of Cultural Heritage in Europe, and it will be published on the ENUMERATE website. The report presents the results of the Thematic Survey and it will contain where possible references to Numeric Final Report, in order to show developments since the Numeric project. The report must be announced through all digital channels that ENUMERATE can employ.

The data collected in the Thematic Survey events will be made anonymous and published on the ENUMERATE Data Platform. Depending on the available project budget, tools to assess and report on the statistical data can be part of the services offered by the Data Platform. The ENUMERATE Team will make efforts to search for additional funding to support the development of a sustainable solution.

Designing the Data Platform is an activity of Work Package 3 leader Digibis in coordination with Panteia. Panteia will work closely together with Digibis in preparing the data to be published on the Data Platform. Implementing the platform will take place in the month of April 2013. The actual launch of the platform is foreseen no earlier than the summer of 2013.

Schedule of activities

Activity	Start date	Due date	Actor
Final Report Thematic Survey	15/03/2013	31/03/2013	Digibis, Panteia
Implementing ENUMERATE Data Platform	01/04/2013	30/04/2013	Digibis, Panteia
Data available on ENUMERATE Data Platform	-	01/07/2013	Digibis, Panteia

3 Annex: ENUMERATE Thematic Survey time schedule

