

INTERIM REPORT FOR THE

ECONOMIC AND SOCIAL DATA SERVICE

JANUARY – JULY 2003

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1) INTRODUCTION AND SUMMARY

The Economic and Social Data Service (ESDS) was established by the ESRC and came into service on 1 January 2003, initially contracted for a period of 57 months. The ESDS is a new national data archiving and dissemination service which has initially been funded for 57 months, jointly by the Economic and Social Research Council (ESRC) and the Joint Information Systems Committee (JISC).

The ESDS has been established as a distributed service, based on a collaboration between four key centres of expertise: the UK Data Archive (UKDA), the Institute for Social and Economic Research (ISER), both based at the University of Essex; Manchester Information and Associated Services (MIMAS) and the Cathie Marsh Centre for Census and Survey Research (CCSR), both located at the University of Manchester.

The ESDS comprises six distinct yet inter-related functions.

- *ESDS Management* - The overall direction and management for the ESDS is the responsibility of the UKDA. Through this function, the UKDA provides consistency and standards across the service. It performs a broad strategic role, relating to a variety of stakeholders concerned with the supply, funding and use of social science data, and seeks to create a coherent publicity, promotion and outreach strategy for the whole service.
- *ESDS Access and Preservation* – Also hosted by the UKDA, this function represents the core of the ESDS, focusing on the central activities of data acquisition, processing, preservation and dissemination.
- *ESDS Government* - This function provides a support and training programme designed to generate a significant increase in the use of large-scale government datasets among both potential novice users and more sophisticated data analysts. The service is led by the CCSR at Manchester, with support from the UKDA.
- *ESDS International* - This function provides access to, and support for, a range of international datasets – both macro and micro sources. The central aims of the function are to promote and facilitate increased and more effective use of international datasets in research, learning and teaching across a range of disciplines. The function is led by MIMAS at Manchester, with support from the UKDA.
- *ESDS Longitudinal* - The work of ESDS Longitudinal is undertaken jointly by the UKDA and the UK Longitudinal Studies Centre (ULSC), based at the Institute for Social and Economic Research (ISER). The function supports a range of longitudinal data collections, providing user support, training, promoting the increased use of longitudinal data and creating data enhancements.
- *ESDS Qualidata* - This specialist function provides access to, and support for, a range of qualitative datasets, and is hosted by the UKDA. The function is responsible for generating a number of data enhancements for major qualitative data collections, and for providing information and training resources that focus on strategies for re-analysing qualitative data.

The reporting year for ESDS runs from 1 August to 31 July, therefore the first full Annual Report will cover the period 1 August to 31 July. This interim report covers only the first seven months of ESDS, namely the period 1 January to 31 July 2003.

2) AIMS AND OBJECTIVES OF ESDS

As stated in the previous section, ESDS is organized into six structural functions, two core and four enhanced data services. The stated aims and objectives for each of these are as follows.

ESDS Management

This function, hosted by the UK Data Archive, exercises overall direction and management of ESDS. It is responsible for bringing together and providing coherence across the service through integrating the activities of the ESDS Access and Preservation function and four value added functions. ESDS Management also provides a broad strategic role, relating to a variety of stakeholders concerned with the supply, funding and use of social science data. Specific aims and objectives of ESDS Management include:

- *Universal Portal:* The development of a 'Universal Data Portal' to provide an initial point of entry to all ESRC-funded data services and link to other social science data services and resources.
- *One-stop registration:* A central registration across the ESDS to be provided, which will include the Athens authentication system.
- *General User Support:* A central 'first stop' help desk service to be established to answer all general procedural enquiries.
- *Branding, Marketing and Promotion:* The creation of a homogenous, well-integrated view of the ESDS, supported by web pages a newsletter, other promotional materials and literature, as well as other 'out-reach' activities.
- *Acquisitions:* A Collections Development Policy will be implemented in line with the ESRC's data acquisitions policy. Potential acquisitions will be reviewed to ensure a coherent policy and collection. Procedures for potential depositors will be produced for use across ESDS.
- *Contents Management:* The function will report on user and usage statistics in accordance with an agreed memorandum of understanding. Internally the service will conduct an analysis of activity-based time-use to instruct and inform the development of strategies across ESDS.
- *Standards and Systems Management:* The function will provide procedures for data preparation, preservation, processing and documentation, cataloguing and conditions of use, with the aim to develop and maintain common standards across ESDS.
- *Liaison with Stakeholders:* The service will convene an Advisory Committee of stakeholders to help strategic planning. A User Forum will also be established and maintained.

ESDS Access and Preservation

This function, hosted by the UK Data Archive, provides access to all the datasets for ESDS except the macro International datasets supported by MIMAS at Manchester. It also undertakes initial ingest activities on all in-coming datasets (except macro International datasets) and offers technical support and development for the whole of ESDS. The function provides a preservation service for ESDS as a whole. Specific aims and objectives of ESDS Access and Preservation include:

- *Data acquisition:* The function works to identify and acquire a range of data from across the social sciences and related disciplinary areas, both qualitative and quantitative. This work of data acquisition is undertaken within the broad framework of the ESRC's stated datasets policy and under the strategic direction for acquisitions set by ESDS Management. A target number of 95 new data collections will be acquired per annum.

- *Resource validation and conversion:* The function undertakes primary ingest activities for all those data collections acquired by ESDS (except macro international datasets). Data and documentation processing adhere to an agreed set of standards and procedures, and include validation, consistency and cross-comparison checking, together with the checking of licensing arrangements, copyright and access conditions. Data are then converted to differing formats appropriate for preservation and dissemination.
- *Metadata creation:* Paper documentation is scanned and together with any machine-readable documentation is converted to Portable Document Format (PDF) and book-marked for easy navigation. All documentation files are placed on-line for instant access and download. A catalogue record is created according to international standard conventions and index terms are assigned to the study from a controlled vocabulary.
- *Preservation and collections management:* The function preserves all datasets acquired across ESDS. Data and documentation are converted to, and held in, stable formats, which are considered to be as software and as hardware independent as possible.
- *Data delivery:* The function provides an on-line data ordering system to cover all datasets within ESDS. For newly-acquired data the function provides an on-line download service by which whole studies can be downloaded in a variety of formats and the writing of bespoke CD-ROM/DVDs. In addition, key datasets are mounted in the Nesstar system which provides on-line browsing and visualisation of the data, including tabulation and graphing.
- *Advice and user support:* Supplementing the central ‘first stop’ help desk service, user support is also provided for users of low-to-medium use ‘core’ data.

ESDS Government

This function, hosted at the Cathie Marsh Centre for Census and Survey Research, Manchester (CCSR) with support from the UK Data Archive, aims to promote and facilitate increased and more effective use of large-scale government survey datasets in research, learning and teaching across a range of disciplines. The function works closely with ONS and other data producers to ensure that the complementarity of interest between producers, commissioning government departments and academic users is maximised. Specific aims and objectives of ESDS Government include:

- *Value added data enhancement:* The function provides easy routes through the complex documentation on the government surveys that recognise the range of user requirements and the different levels of user sophistication. These include methodological guides that highlight key strengths of these surveys (e.g. the time dimension and the hierarchical household information). It also provides support for two main statistical packages – SPSS and STATA. Databases will be developed that hold key contextual information for the historical time periods relevant to the surveys. CCSR will also promote the use of geographic visualisation tools (Common GIS) developed at MIMAS to ensure that the geographical strength of the government datasets is fully exploited.
- *Specialist advice:* This is made available through a help desk service, a moderated discussion list, web-based FAQ site, advice on data management and statistical advice on analysis, model building and interpretation of results for SPSS and STATA.
- *Training:* The service runs: courses to raise awareness of government datasets and their research potential; courses to provide training in some of the unique aspects of the datasets; topic based courses; courses on specific statistical packages, SPSS and STATA and, via the CCSR short-course programme, methods of statistical analysis, covering a range of levels. All ESDS course materials are made available on-line.
- *Teaching datasets:* A range of teaching datasets are being developed and updated in consultation with methods teachers. A new dataset will be developed each year.

- *Dissemination activities:* The function has responsibility to: raise awareness of the research potential of the government datasets; engage new user groups (graduate students will be a particular focus); exchange information between users and producers; and promote interchange with government departments and academia. This includes an annual research conference held in collaboration with ONS and a twice-yearly newsletter.
Themes: The production of material and new courses is topic based. In year 1 the function will focus on 'Employment and the labour market'. User consultation has resulted in the year 2 theme being health.
- *Data acquisition:* The UKDA works to identify and acquire a range of data from UK Government departments. This work of data acquisition will be undertaken within the broad framework of the ESRC's stated policy, with input from the CCSR.
- *Resource validation & conversion and Metadata creation:* The UKDA undertakes primary ingest activities for all Government data collections acquired by ESDS in line with the procedures listed under ESDS Access and Preservation, above. Equally, PDF versions of documentation are created and placed on-line for instant access and download, and a catalogue record is created with index terms assigned.
- *Data delivery:* The UKDA provides resource discovery tools and an on-line data ordering system for all enhanced Government datasets within ESDS together with data dissemination via an on-line download system, Nesstar for on-line tabulation and data browsing, and the writing of bespoke CD-ROM/DVDs.

ESDS International

The ESDS International function provides access to and/or support for a range of international datasets (macro and micro) and the NS Time Series Databank. The central aims of the function are to promote and facilitate increased and more effective use of international datasets in research, learning and teaching across a range of disciplines. The service is hosted by MIMAS at the University of Manchester, with support from the UKDA for international micro datasets.

- *Data acquisition:* MIMAS works closely with ESDS Management to develop a responsive acquisitions strategy and takes prime responsibility for the negotiation to key international macro datasets for the UK academic community. MIMAS also works to build upon the existing network of contacts to develop productive relationships with key data providers and international social science data archives. The UKDA identifies and acquires a range of international microdata from across the social sciences and related disciplinary areas, including the Eurobarometer and ISSP collections. The UKDA also acquires data from ICPSR and the CESSDA organisations, according to user needs and requests.
- *Value added services:* Key time series are developed for alternative classifications of countries, such as highly indebted countries. The CommonGIS software is used to build a highly interactive web based data exploration and visualisation interface to a set of key international statistics (e.g. population dynamics or economic development indicators). Shareable collection level descriptions for the key international datasets are created and maintained. A searchable web-based guide to international datasets is being developed as a resource discovery tool.
- *Training:* Subject to user consultation the following courses are provided: introductory courses to raise awareness of international datasets and their research potential; introductory and advanced courses on data analysis.
- *User support:* Specialist support is provided on international datasets via a dedicated telephone and email helpdesk. A web-based FAQ is provided containing many of the common questions sent to the helpdesk.

- *Support materials:* A range of support materials are made available via the web. Introductory guides provide an overview of the structure and content of the international statistical databanks and survey datasets. More advanced user guides are being developed covering key methodological issues and concepts, such as harmonisation and cross-country comparability.
- *Dissemination and outreach:* A range of dissemination and outreach activities are conducted to increase awareness about the research and teaching potential of international datasets. These include information sent to general and service specific mailing lists; attendance and presentations at workshops and conferences; promotional articles for newsletters/bulletins; articles in academic journals; and the distribution of publicity materials. An annual one-day conference will be held. A series of web-based case studies/exemplars are being produced to demonstrate good practice in the use of international datasets in research and teaching.
- *Resource validation & conversion and Metadata creation:* MIMAS undertakes quality assurance and re-formatting of macro datasets prior to mounting on the Beyond 20/20 server. The UKDA undertakes primary ingest activities for all micro international data acquired (except data from ICPSR or CESSDA member organisations) in line with the procedures listed under ESDS Access and Preservation, above. Equally, PDF versions of documentation are created and placed on-line for instant access and download, and a catalogue record is created with index terms assigned.
- *Data delivery:* MIMAS provides a web-based access to regularly updated macro economic time series datasets, such as OECD's Main Economic Indicators and IMF's International Financial Statistics using Beyond 20/20 Web Data Server. The UKDA provides resource discovery tools and an on-line data ordering system for all international microdata within ESDS together with data dissemination via an on-line download system and the writing of bespoke CD-ROM/DVDs.

ESDS Longitudinal

This function provides general support for a range of longitudinal data collections and value-added support for the British Cohort Study (BCS70); the British Household Panel Survey (BHPS); the Millennium Cohort Study (MCS); and the National Child Development Survey (NCDS). It works closely with the ESRC national longitudinal strategy, managed by the ULSC, in conjunction with the ESRC National Strategy Committee. With reference to these existing bodies, the function also seeks to identify new longitudinal data collections suitable for inclusion under this function. Specific aims and objectives of ESDS Longitudinal include:

- *Data enhancements:* These are essentially aimed at aiding usability of available data sets. Data enhancements include the harmonisation of data standards across waves or sweeps in order to make data usage simpler and more transparent, improvement of weighting, the presentation of missing data and other statistical adjustments, and additional derived variables. Additionally, the service will develop a means of allowing researchers to make use of confidential data, especially geo-coded data about members of longitudinal studies, without prejudicing the confidentiality of those respondents.
- *Data delivery:* A three-fold strategy for data dissemination will be developed comprising: instant downloadable data files; the creation of on-line sampler files providing preliminary investigation and evaluation of the data for the BHPS, BCS70 and NCDS; a data management tool to work in conjunction with BCS70 and the NCDS.
- *Specialist advice:* A help desk provides advice on a variety of technical and non-technical aspects of data analysis aimed primarily at the more advanced user. This service integrates with further user support provided at the IoE.

- *Specialist user group activities and dissemination strategy:* In addition to the help desk facility, in order to promote the exploitation of longitudinal data in new and emerging user communities, a series of meetings and workshops aimed towards novice users will be held. More advanced users will be supported by a number of focused workshops, training and ‘data confrontation’ sessions. User support information will also be made available via newsletters, mailbase lists, email discussion groups and the service website.

ESDS Qualidata

This function provides access to and/or support for a range of qualitative datasets. The function is housed within the UK Archive and builds on Qualidata’s expertise and international reputation in this area, developed over the past seven years. Specific aims and objectives of ESDS Qualidata include:

- *Data enhancements:* The function undertakes a series of data enhancement comprising: creation of web-based samplers; creation of thematic resources; web delivery of marked-up texts; enhancement of collections held elsewhere, and data enhancement through value-added processing, for example, providing extended user guides. Enhanced data processing work includes ensuring that data are fully anonymised, and are in the appropriate digital format; that all speakers are assigned in interview texts; that a detailed data listing is provided as an enhanced finding aid to the collection; and that dedicated user guides and webpages are in place. Any paper-based documentation will be scanned, converted to PDF and book-marked. The projects for data enhancement are identified in consultation with the Qualidata Advisory Committee.
- *Data delivery:* Initial priority is placed on direct download and off-line dissemination, web-based delivery of interviews and on-line analysis tools. The publishing of enhanced qualitative data resources within web-based systems is supplemented by mounting all newly acquired core qualitative data on the ESDS Access and Preservation download service. Work is also underway in developing using XML as a potential method for the standard representation and dissemination of a broad class of qualitative data. The function will also explore extending the functionality of web exploration of data to online data annotation, such as coding.
- *Specialist advice:* The function operates a help desk facility for users supported by a website with Users Guides and an FAQ. Training days are organised in line with identified user needs and tailored User Guides produced.
- *Specialist user group activities and dissemination strategies:* User group activities and dissemination strategies for this function focus on the following key areas: virtual user groups supported by email discussion lists and bulletin boards; workshops and open days; data confrontation workshops; teaching and training materials; webpages, publications, and discussion lists; proactive strategies. Workshops include generalist introductory sessions and more focused meetings concentrating on detailed areas of research interest and methodology. These are supplemented by ‘data confrontation’ workshops that aim to enhance the methodological and substantive understanding, and secondary analytic potential, of archived qualitative data sources. Advice and training is also provided in best practice in data creation and data management, particularly to support ESRC award holders.
- *Liaison with data suppliers:* Support for depositors is undertaken to ensure that data are received in appropriate formats, are complete, fully supported by adequate documentation, and that confidentiality, data protection and copyright issues have been addressed.

3) MAIN ACHIEVEMENTS OF THE REPORTING PERIOD AND PROGRESS TOWARDS THE ESDS'S OBJECTIVES

During the first seven months of the ESDS, the period covered by this interim report, emphasis has been on establishing the new service. Within this context, three key objectives over the initial period of ESDS have been to establish effective communication between the separate units of the distributed service; to establish an identity for the new service within the social scientific community; and at the same time to continue service to the user community. We believe that we have addressed all of these successfully.

In relation to the first, an ESDS 'get together' was held in Essex in early January in which all ESDS staff took part. Two days of meetings were held at which working groups were formed to discuss and map out future plans and working arrangements. This not only proved successful in providing an opportunity for the dispersed staff to meet one another, but also allowed lines of communication to be quickly established. Subsequent to this, specific teams have established and maintained email contact with internal 'group' lists and a monthly video-conference between the senior members of the Essex and Manchester teams has taken place. Communication has been further facilitated by a secure server site being established which can be accessed by all ESDS staff and on which internal documents, procedures and working papers can be placed for reference across the service. The new distributed help desks are now operational and a test for the collection of statistics under the developing SLD was undertaken across the service during May.

In order to promote and raise user awareness about the new service a lot of effort has been placed on organising and contributing to a number of meetings, training events; seminars and workshops, in addition to those stated in the agreed milestones. These include both general meetings covering the entire ESDS as well as more focused workshops held by the individual ESDS units. (For a list of these see outreach activities see Appendix II.) The new service was formally launched on 30 June at an event held at Regent's College, London, at which various new products were demonstrated and Ian Diamond and Len Cook (the National Statistician) gave addresses. This meeting also provided the opportunity for the first meeting of the ESDS Advisory Committee to take place, under the chairmanship of John Pullinger of ONS. (A list of the members of this Advisory Committee is provided in Appendix III.)

An early achievement for the ESDS was the undertaking of a user survey across all functions of the service in March 2003. The survey not only raised awareness of the new service but also gathered feedback from current and potential users of social and economic data on the relevance of the data and support services planned by each of the four ESDS specialist data functions. The results of the surveys were much welcomed by the ESDS teams. Not only have they helped confirm and consolidate the deliverables already drafted for the separate functions they have helped pinpoint more precisely priorities for both data enhancement work and for planning support activities and resources. The full report, *Assessing and Analysing Social and Economic Data: Users' Needs Uncovered* is available at: <http://www.esds.ac.uk/news/UserSurveyRep.pdf>

A new logo for ESDS has been produced together with a comprehensive set of promotional leaflets and posters. The first generic ESDS newsletter was produced and circulated in February, and the first newsletter of ESDS Government was produced in July, being distributed in August. An initial outline ESDS website was established in February. This formally went live on Friday 18 July (see <http://www.esds.ac.uk>) and is continuously being populated with new content.

Despite the pressures to launch and establish the new service, services to users have continued with minimal disruption between the new and old services. User services are being enhanced and augmented to reflect the new service. New help desks and query tracking systems have been put in place and a major user survey was conducted in March across all of the value-added ESDS functions.

The new service has also been successful in implementing a number of technical developments. ESDS International launched the first version of the online data delivery system using Beyond 20/20 in April populated with OECD Main Economic Indicators data. A new registration service, developed by ESDS Management for ESDS International, was launched in June in order to augment the web-based Beyond 20/20 delivery system and the NS Times Series Databank. Likewise, a new version of the online Nesstar data browser was launched in June. This includes many improvements over the previous version, especially in terms of navigation. In this period over 60 key government datasets were released in the new system.

Each of the four specialist ‘value-added’ ESDS units have been active in developing a profile in the user community, promoting the new service and generating materials to support research and teaching. For example, ESDS Government have been successful in establishing a number of topic-specific user groups – in response to a consultation with data producers – with annual meetings, the first of which on the Health Surveys, attracted about 100 participants. Workshops have been held in Oxford, Newcastle and Manchester, seminars given in Leeds and Bristol together with a number of conference presentations and posters. An online introductory guide to *Employment and the labour market* has been completed which, through web links, has been able to capitalise on the large number of relevant documents available on the ONS web-site, and a bespoke teaching dataset has been created in collaboration with both the data producers and teachers. Similar examples could also be given for the other specialist ESDS units. Full details being provided in section 5 of this report.

ESDS International has successfully negotiated access agreement licences for a range of macro international data with the IMF, UNIDO and OECD (see <http://www.mimas.ac.uk/news/press/imf-apr03.html>). The ESRC has provided additional funding to enhance the collection of international macro databanks available through the ESDS International Data Service based at MIMAS. The bulk of the award is to fund five-year UK-wide academic redistribution licences for the United Nations Common Database, the World Bank World Development Indicators and Global Development Finance databanks, the International Labour Organization (ILO) Key Indicators of the Labour Market (KILM) and eight extra OECD datasets (including International Migration Statistics and Measuring Globalisation Statistics). The additional datasets extend the coverage of the ESDS International portfolio to include a more diverse range of topics such as human development, globalisation, migration, labour markets, social expenditure, demography, environment, education, science and technology. It is estimated that by the end of 2003, ESDS International will have secured access to over £5 million pounds worth of data for a five year period for approximately £500,000 thus delivering significant savings to the whole academic community and removing a significant barrier to use of international data in research and teaching.

It is also worth mentioning that in the first seven months of the new service ESDS has worked hard to involve itself at a strategic level with related stakeholder developments. This has included input to a number of ESRC and JISC consultations, the MRC data archiving and data dissemination initiative, and discussions to explore cross-working with a number of partners including ONS, the National Archives and CASS Q-bank.

In addition to these more visible developments, over the reporting period the largely ‘hidden’ elements of the service, ESDS Access and Preservation and ESDS Management, undertook a large amount of work on internal systems development, building the ESDS administrative back-end. This is largely invisible to the outside world and isn’t necessarily reflected in the agreed milestones, yet is critical to the smooth functioning of the service. An overview of these developments is summarised as follows:

- Work on a complete re-vamping of the process by which users register, order data, and are charged is underway, together with a complete restructuring of the central user and order database. New system to be launched 1 May 2004.
- New procedures regarding the acquisition process are well advanced, with new interactive deposit forms, new depositor licence, new back-end database for depositors and acquisitions negotiations.
- A new suite of input programs for the new catalogue have been implemented and new cataloguing QA procedures have been put in place. These will greatly speed and improve quality of cataloguing.
- Specification work to implement a new data processing tracking database, which will directly feed the UKDA-produced metadata (catalogue metadata, read files, citation and title page information).
- Automation work undertaken to speed, smooth, and standardise the preparation of datasets in multiple software formats for http download.
- Work on access control will allow more users to access more datasets via http download (i.e. “depositor permission” datasets will be able to be mounted, non-academic users will be able to use download if access conditions permit, etc).
- Work on Athens implementation, and on becoming an Athens issuing agent for users outside UK HE/FE who can’t obtain Athens IDs through their home institution, and on implementing Athens in Nesstar access control.

4) MAIN ISSUES IDENTIFIED DURING THE REPORTING PERIOD, AND ACTION TAKEN.

Despite the general success of the first phase of the new service there have also been a small number of issues.

First, ESDS Qualidata unfortunately experienced problems in recruiting a new member of staff to undertake data enhancement work and specialist user support. After an initial disappointing response the post had to be re-advertised. Eventually the service was successful in appointing a candidate from the USA, but since the person is not from the EU this has resulted in further delays. The post did not start until after this reporting period. This situation has been further exacerbated by the prolonged illness of one of the ESDS Qualidata processing staff. These problems necessitated the juggling of priorities and the employment of temporary staff and will inevitably result in a re-scheduling of some data enhancement tasks for ESDS Qualidata. ESDS Government (CCSR) was not able to get its full complement of 1.8 staff in place during this time period and was, therefore, functioning at an average of 1.5 FTEs

Second, problems arose with the licensing arrangements for the IMF data series at Manchester. These were primarily related to the issue of indemnity in the (unlikely) event of a breach of the terms of contract with the IMF. The problem was discussed with the ESRC and eventually in July. Additionally, problems at Eurostat impacted on the timing of the negotiations for a license to disseminate the New Cronos data series.

Third, although awareness sessions for new users of longitudinal data have taken place, in order to provide a more comprehensive set of training for new users, it was decided to delay further training events and awareness days to take advantage of the BHPS samplers and new releases of data (especially MCS) becoming available. Moving the timing of these milestones out of this reporting period to fit in with the programme of data enhancements and new data releases will undoubtedly benefit the potential user community.

Forth, the original timings for the design and development of the Universal Portal needed reconsideration in the light of other related developments concerning the ESRC's Information Strategy. It was agreed with the ESRC that these developments be held back until the Council's plans for its Information Centre are further advanced.

5) PROGRESS AGAINST STATED MILESTONES

In addition to annual reporting, the ESDS is required to make Quarterly Reports to the ESRC and JISC. These include a report on progress against stated milestones. This section is reproduced from existing Quarterly Reports. It is also important to note that the contractual milestones for ESDS are organised by quarter from January 2003 and therefore do not overlap entirely with the period for this interim report. This problem has been addressed and will not occur in the case of future reports.

ESDS Management

January – March, 2003

Basic infrastructure in place: central helpdesk, email lists, discussions lists; queries database; Advisory Committee and reporting structure.

Achieved. All of the basic infrastructure of ESD was in place by mid-February. An Advisory Committee chaired by John Pullinger of ONS has been established and will hold its first meeting in June.

First service newsletter produced; promotion of new service.

Achieved. A newsletter was produced and distributed in February (for pragmatic reasons this was the last of the old *UKDAbytes*, a second newsletter with ESDS branding will be available in June). Promotional leaflets and posters for ESDS have been produced and made available at a number of promotional events attended by ESDS staff.

April – June, 2003

Design for Universal Portal completed.

This milestone has not been achieved. Development work on the Universal Portal will need to be rescheduled in the light of the ESRC's decision to undertake a reassessment of its Information Strategy. ESDS would welcome clarification of the ESRC plans and a new timetable needs to be discussed and agreed.

Implement Activity-Based Costings (ABC) collection procedures.

Achieved. A procedure for collecting ABCs on a sampling basis has been devised and put in place. All Essex staff have been monitored since 1 June. However, advice is needed over whether MIMAS and CCSR staff should be included in this exercise.

Complete guidelines on data preparation; preservation; data processing and cataloguing for use across service.

Guidelines on preservation, data processing and cataloguing all available as internal documents. A summary set of guidelines on data preparation has been produced, printed and circulated to new ESRC award holders. A fuller set of guidelines on data preparation (integrating existing information for quantitative and qualitative data producers) is currently being revised and will be made available on the ESDS website during the next quarter. A separate set of procedures for data loading and checking OECD MEI and NS Databanks has been produced by the MIMAS team.

Complete depositor licence agreements; depositor forms and user access agreement for use across service.

A new deposit licence agreement and associated forms have been produced. A proto-type version of an on-line version of the new deposit forms was presented at the ESDS Launch on 30 June. These will be implemented over the next quarter. A new access agreement form (the End User Licence) has been drafted but cannot be finalised until agreement is reached between ONS, HMSO and the ESRC's solicitors.

Report to ESRC Research Board (RRB) on development of ESDS strategy.

No request to present a report to RRB was made by the ESRC. However, the first Quarterly Report of ESDS was provided for information, but it is unclear if this was circulated to RRB members. Advice is requested on how ESDS should interact with RRB meetings in the future.

Hold first ESDS Advisory Committee meeting.

Achieved. First meeting held on 30 June under the chairmanship of John Pullinger (ONS).

Organise and hold event to 'launch' new service.

Achieved. ESDS formally launched on 30 June at Regent's College, London. Similar presentations also given at the MIMAS Open Forum in Manchester on 2 July.

Produced first set of user and usage statistics for ESDS

Achieved. In collaboration with the JISC MU, an initial set of statistics in line with a draft SLD was collected retrospectively during May, and the process has been on going since. However, the details of the SLD still need to be agreed and finalised.

ESDS Access and Preservation

January – March, 2003

Basic infrastructure in place: ingest work in incoming datasets; preparation of data for preservation; dissemination and ordering procedures; advise for data producers and award holders and applicants in place.

Achieved. All ingest, data preparation, dissemination and ordering procedures in place. Advise to award holders and applicants is given verbally and by email. Supporting webpages also exist on the UKDA site, and will be moved to the main ESDS site in June.

Produce web-based FAQs.

Achieved. These are available on the UKDA website and will be moved over to the main ESDS site in June.

April – June, 2003

Complete the co-ordination of help desk, user support procedures and queries database with management/co-ordination function and with value-added functions

Achieved. Help desk and user support functions now integrated.

Continue to acquire, undertake ingest processing; preservation and dissemination of datasets

This is an on-going process.

ESDS Government

January – March, 2003 (CCSR)

User survey to inform priorities in terms of topics and datasets.

Achieved. A user survey was conducted in March, which provided 191 responses relating to Government datasets.

Operational help desk and email lists.

Achieved. Government data help desk at Manchester co-ordinated with main help desk at Essex.

Establish web site integrated with seamless link to UKDA.

An initial outline ESDS website was established in February covering all ESDS specialist functions, and linked to the existing UKDA site. Further integration of the website is underway.

Initial FAQ and advice on data management and statistical analysis.

Achieved.

Establish virtual user group and discussion list.

A Government data discussion list has been set up and is in use.

Produce and distribute initial promotional material.

Achieved. General ESDS posters and leaflets have been produced, together with a specific poster/handout for ESDS Government. Specific leaflets for ESDS Government are in the process of being produced. Promotional materials have been distributed at appropriate events.

Introductory web-based guides to SPSS and STATA.

A detailed draft of each is available and a final version will be ready by the end of June (this work is being done by Yaojun Li, who did not start work until 1 March).

January – March, 2003 (UKDA)

Basic infrastructure in place: ingest work in incoming datasets; preparation of data for preservation; dissemination and ordering procedures

Achieved. All ingest, data preparation, dissemination and ordering procedures in place.

April – June, 2003 (CCSR)

Production of first theme-based introductory guide.

Achieved. Materials ready to go live on new ESDS website.

Introductory course on large-scale government datasets.

Course held in Oxford on 12 June – another course to be held in Manchester, 21 July.

One-day course on analysis using SPSS/STATA.

SPSS courses ran on 22 and 24 January. Introduction to STATA course held on 30-31 January. Data management course held on 12 March. Course on Statistical modelling with STATA held on 16 April.

Production of first newsletter.

Achieved. In process of being mounted on new ESDS website and hard copies being posted to users.

April – June, 2003 (UKDA)

Complete the co-ordination of help desk, user support procedures and queries database with management/coordination function and with value-added functions

Achieved. Integrated help desk and user support facilities functioning.

Continue to acquire, undertake ingest processing; preservation and dissemination of datasets

This is an on-going requirement and is undertaken routinely as required.

ESDS International

January – March (MIMAS)

Successful negotiation of academic redistribution licences and delivery of data.

The UNIDO Industrial Statistics Database 2002, Industrial Statistics Databases 2002 and the Industrial Demand-Supply Balance Database were acquired in January. OECD MEI data continue to be supplied and updated monthly. Following a series of approaches to Daniel Byk (Head of Data Dissemination), Eurostat have agreed to supply the New Cronos databank on a quarterly basis. This significantly reduces the cost of the data. ESDS International are still awaiting feedback from Eurostat about proposed modifications to the UK academic data licence agreement for New Cronos. A formal response has been promised for the week commencing 7 April. The NS Time Series Databank was updated on 9 January and 10 February.

The March release of the IMF Databanks (IFS, BOPS, DOTS and GFS) has been received. However, problems have arisen regarding the licensing of the data. These have been to the ESRC for resolution. It is urgent that these be resolved to enable the service to be launched in June.

A bid was submitted to the ESRC for funding to acquire a number of additional international macro datasets to complement and extend the current portfolio. The additional datasets requested include

data from the United Nations, the ILO and OECD. This bid went to the ESRC RRB in March and was successful.

Set up communication channels with data providers.

Achieved. See above.

Establish international data web site accessible via the ESDS universal portal.

An initial outline ESDS website was established in February covering all ESDS specialist functions, and linked to the existing UKDA site. Further integration of the website is underway.

Access to shareable collection level descriptions via ESDS universal portal.

Collection level metadata are available via the MIMAS site which is linked to the main ESDS web site. These will be fully integrated at the ESDS universal portal is developed.

Set up operational help desk and email lists.

Achieved. International data help desk at MIMAS co-ordinated with main help desk at Essex.

Beyond 20/20 workbook (OECD version).

Achieved. The March release of the OECD MEI was loaded into Beyond 20/20, with an Athens authentication front-end.. Emails have been sent to MIMAS representatives and users to test the interface and gain feedback.

Initial FAQ and service overview.

Achieved.

User consultation exercise on training and teaching requirements (phase 1).

Achieved. A user survey was conducted in March, which provided 52 responses relating to International datasets. Specific questions were asked in the survey on training and teaching requirements.

Establish virtual user group.

An International data discussion list has been set up and is in use.

Produce and distribute initial promotional material.

Achieved. General ESDS posters and leaflets have been produced, together with a specific poster/handout for ESDS Government. Specific leaflets for ESDS International are in the process of being produced. Promotional materials have been distributed at appropriate events.

Set up procedures for production of performance monitoring statistics.

Discussions with MU concerning the SLDs are underway. A test collection period will take place in May-July with the complete SLD becoming operational in August (the same is true across all ESDS functions)..

January – March (UKDA)

Acquire international micro-data from sister archives internationally in accordance with user requests.

Mechanism is place, but only one such request during this period. (This is in part due to the fact that there have been not new releases of Eurobarometer or ISSP data during this period.)

Catalogue regular repeating international micro-data series to agreed international standards.

Mechanism in place, but not required as no new series released.

Index catalogue entries in accordance with HASSET.

See above.

Proof-read and quality check all catalogue entries.

See above.

Write bespoke CD-ROMs/DVDs or provide ftp/download services for ordered data on request.

Mechanism is place, but only one such request during this period.

April – June, 2003 (MIMAS)

Provide web-based access to all datasets comprising initial portfolio.

Web-based access to OECD data using Beyond 20/20 implement in April. Athens-based registration system based on and interoperable with CSR extended successfully to ESDS International in June. Availability of IMF data delayed due to protracted negotiations over licensing arrangements. Licence negotiations with World Bank and ILO underway. Awaiting feedback from Eurostat over proposed license arrangements for New Cronos.

IMF Dots trial version available. Feedback awaited.

New releases of the OECD Main Economic Indicators were received and subsequently loaded in April, May and June, as were new releases of the NS Time Series Databank.

Develop pilot data exploration and visualisation interfaces.

The CommonGIS application has been loaded onto the ESDS development server. Next stage to identify themed dataset for first application.

Searchable web-based guide to international data sources.

Updating the ESDS website with information on international data resources is an ongoing activity. In addition, User Guides specific to each dataset are in the process of being produced. An OECD MEI User Guide is currently being created, together with a standard format/template for further user guides.

The online Beyond 20/20 help system has been re-written and revised to include an updated version of the OECD MEI workbook. Both made available in April.

Develop introductory course on international macro datasets.

Two courses are being developed: (i) an introduction to time-series data analysis for Social Sciences which will include univariate modelling and use STATA 8 - to be available January 2004; (ii) an advanced course in Panel time series - to be available Autumn 2004. In addition a general Introductory course is being developed, the methods of delivery for which need to be investigated further.

April – June, 2003 (UKDA)

Complete the co-ordination of help desk, user support procedures and queries database with management/coordination function and with value-added functions.

Achieved. Integrated help desk and user support facilities functioning.

Log and monitor all user queries received, and refer users to custodial archive for support, where appropriate.

Achieved. As above, integrated help desk and user support facilities functioning satisfactorily.

Continue to acquire, and disseminate datasets on request.

This is an on-going requirement and is undertaken routinely as required.

Continue to catalogue and index repeated series.

This is an on-going requirement and is undertaken routinely as required.

ESDS Longitudinal

January – March, 2003

Basic infrastructure in place: help desk; email lists, discussion lists.

Achieved.

Consult with the user community on priorities for enhanced products and data samplers.

Achieved. A user service including questions on enhanced products and longitudinal data samplers was conducted in March. This resulted in 51 responses relating to longitudinal data.

Agree user support strategy for longitudinal data between IoE, ULSC and UKDA.

Achieved. A meeting between all parties was held in London in February and a user support strategy mapped out and agreed.

Operational helpdesk and email lists established.
Achieved.

April – June, 2003

Release first version of sampler dataset for BHPS.

Delayed. Design and spec. for sampler completed but will not go live until new version of Nesstar Light browser is implemented. Expected over course of next quarter. (Note: this was released October. The file contains wave one respondents only, and follows them for eleven waves, selecting broadly the same variables at each wave. There are some (fixed) variables which are only included at wave one, and there are a few variables which only appear intermittently, or are introduced later in the panel. The dataset contains a mix of original variables and derived variables. Substantively the dataset is broadly in the area of work, family and health, and can also be used to examine social mobility and income mobility. It contains a number of background variables indicating parental social class, and some opinion variables relating to the work and family theme, see nesstar.esds.ac.uk/nesstarlight/.)

Production of FAQ webpages on longitudinal data.

Achieved. Ready for release on new ESDS web site.

Produce web-based database of existing longitudinal data collections

This is an extension of the ULSC/ONS 'Keeping Track' project and has been linked to new ESDS web site.

Production and distributed initial promotional material.

Achieved.

Scoping of priorities for other data enhancements.

Following the undertaking of the User Survey (previous quarter) various developments have taken place. A meeting is scheduled to discuss requirements, possibilities and potential for data enhancements to the ELAS. In addition, the UKDA is working on a funding proposal to the MRC to provide data enhancements and improve user access to the ALSPAC and the 1946 Birth Cohort.

Hold awareness day for new users of longitudinal data.

An introductory session was given at the BHPS Conference in June, however, it was decided to hold over the organisation of a more general awareness day until samplers for the BHPS and data from the MCS are available. An awareness day covering all longitudinal data will now be held in the autumn.

ESDS Qualidata

January – March, 2003

Undertake initial consultation exercise on data acquisition priorities.

Achieved. A user service including questions on acquisition priorities was conducted in March. This resulted in 73 responses relating to qualitative data.

Initial user survey undertaken to inform priorities in terms of themes and datasets selected for enhancement.

Achieved. A user service including questions on data enhancements was conducted in March. This resulted in 73 responses relating to qualitative data.

Basic infrastructure in place: help desk; email lists web pages on re-use of data.

Achieved. Web pages on the re-use of data are currently available on the Qualidata site and will be linked to the main ESDS site in June.

Establish virtual user group and discussion list.

Achieved.

Usability testing of online web search-and-retrieve facilities (Edwardians Online).

Achieved. New functionality to the Edwardians Online site will be launched in June.

Downloadable web-based guide to using the Edwardians Online resource.

Achieved.

April – June, 2003

Production of dedicated web pages and FAQ on enhanced data collections

Achieved. Ready for release on new ESDS web site.

Hands-on workshop on using the Edwardians Online resource

Achieved. Held at Essex in June (20 delegates attending). Workshop on Edwardians Online also given at the 2003 IASSIST conference (Ottawa, May).

Introductory workshop on qualitative data resources

See above. Both these workshops and training events contained Introductory sessions on the use of qualitative data.

Transfer of Qualicat online catalogue records to UKDA DDI compliant catalogue

Delayed. The transfer of the catalogue records has been planned and mapped out. Records to be migrated across over the next quarter.

Conference sessions on documenting qualitative data and qualitative data training resources

Workshop sessions on data preparation and data documentation given at Essex (June) and at the 2003 IASSIST conference (Ottawa, May). In addition demonstrations given at JISC FE Regional Support Centre's Conference (March).

Production and distribution of initial promotional material

Achieved.

6) FINANCIAL STATEMENT

The ESDS is covered by three separate contracts issued by the ESRC, each with its own budget. The ESRC financial periods do not correspond with the ESDS reporting periods, and therefore realistically, it is only possible to report with any accuracy on the 3-month financial period January to March 2003. A summary of the budgets and expenditure for the three budget holders, CCSR, MIMAS and UKDA) is given in the table below.

Budget head	CCSR			MIMAS			UKDA		
	Budget	Actual	Dif.	Budget	Actual	Dif.	Budget	Actual	Dif.
Staff	13,411	11,099	-2,312	20,792	20,921	129	173,806	178,873	5,067
Travel (UK)	800	1,507	707	1,125	1,022	-103	1,294	995	-299
Travel (Overseas)	700	0	-700	0	0	0	789	2,025	1,236
Consumables	1,350	852	-498	20,031	20,137	106	10,255	1,501	-8,754
Exceptional items	0	0	0	298,525	234,299	-64,226	4,204	4,703	499
Equipment	7,500	1,093	-6,407	16,256	11,888	-4,368	29,000	0	-29,000
Overheads	6,169	5,106	-1,064	9,564	9,624	59	79,951	82,282	2,331
Total	29,930	19,657	-10,274	366,293	297,891	-68,403	299,299	270,378	-28,921

These three budgets illustrate a common problem: trying to hit initial budget targets within 3 months of establishing a new national service, particularly when funding for the service was confirmed less than one working week prior to the commencement of the new service. CCSR underspent on staff due to the timescale of recruitment. Although orders for PC components, other consumables and equipment for the UKDA were made, expenditure was not actually incurred in this period. Equally, this explains the equipment underspend for MIMAS. The exceptional items underspend for MIMAS is accounted for by the delay in getting an agreed licence for the New Cronos data.

7) PERFORMANCE INDICATORS.

ESDS is required to report quarterly performance statistics to the JISC Monitoring Unit (MU) as part of an agreed Service Level Definition (SLD). Over the period covered by this interim report ESDS has worked with the JISC MU to agree a SLD, and a test SLD statistics collection exercise was undertaken in March. Within this reporting period two sets of SLD figures have been submitted to JISC MU; for the quarters February to March and May to July. These are available at:

<http://www.mau.ac.uk/servicedata/esds/data/esds23.html>

<http://www.mau.ac.uk/servicedata/esds/data/esds24.html>

In May the ESRC requested that ESDS recommend a set of Key Performance Indicators (KPIs), for reporting on an annual basis. The following set of KPIs were agreed with the ESRC subsequent to the period covered by this interim report and will be recorded in future annual reports.

Agreed KPIs

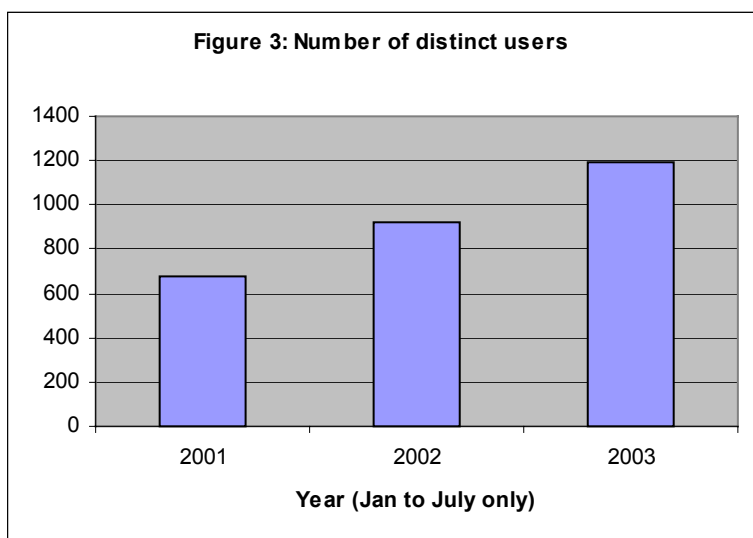
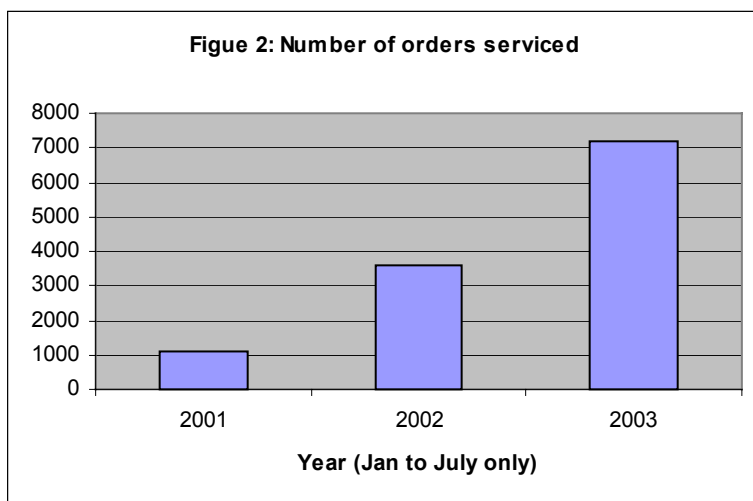
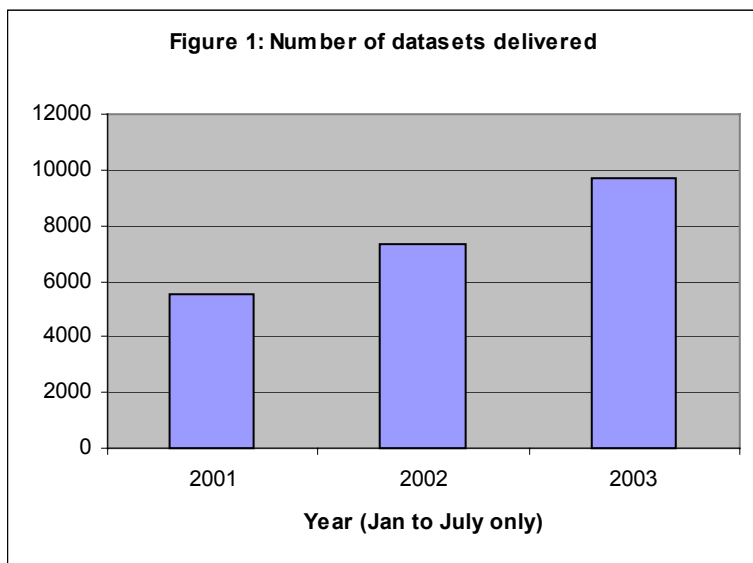
- Quantity and type of data acquisitions;*
- Throughput of data (arrival to availability by end user);*
- Number of registered users;*
- Availability of service to end user;*
- Number of data materials delivered;*
- Publications arising from data requests/accesses (annual publication survey);
- User survey covering data coverage, access and support arrangements.

Note: *=figures available from ESDS SLD.

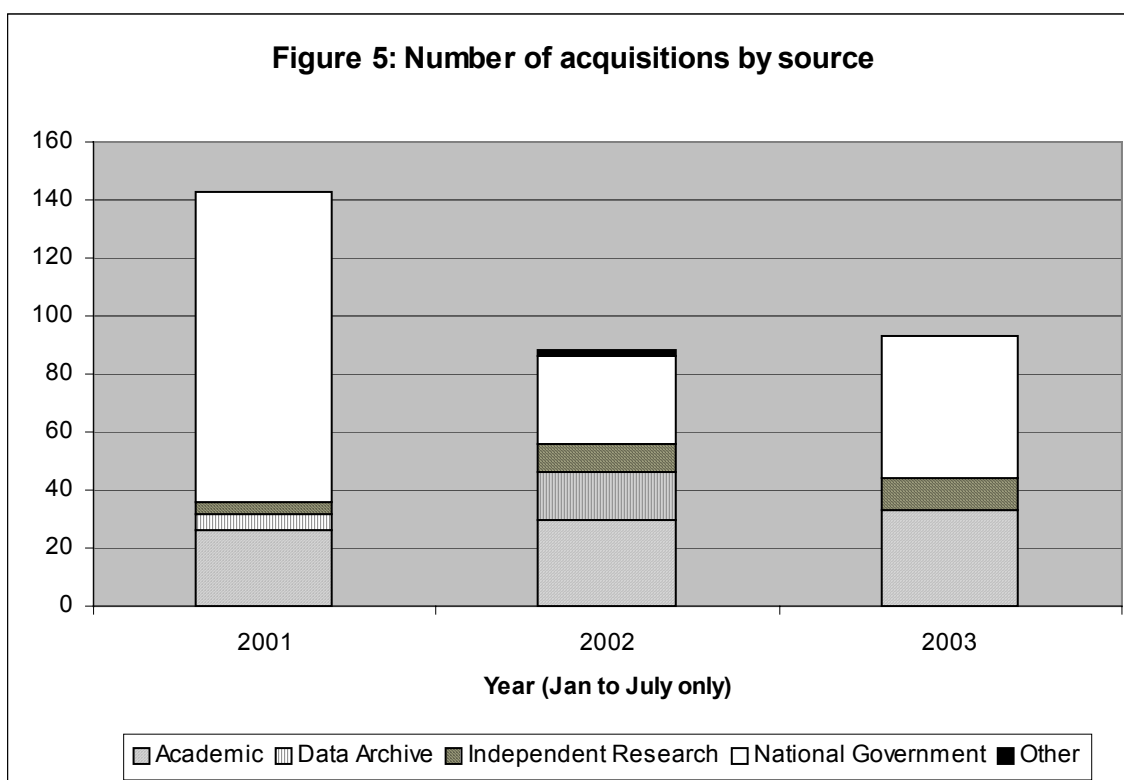
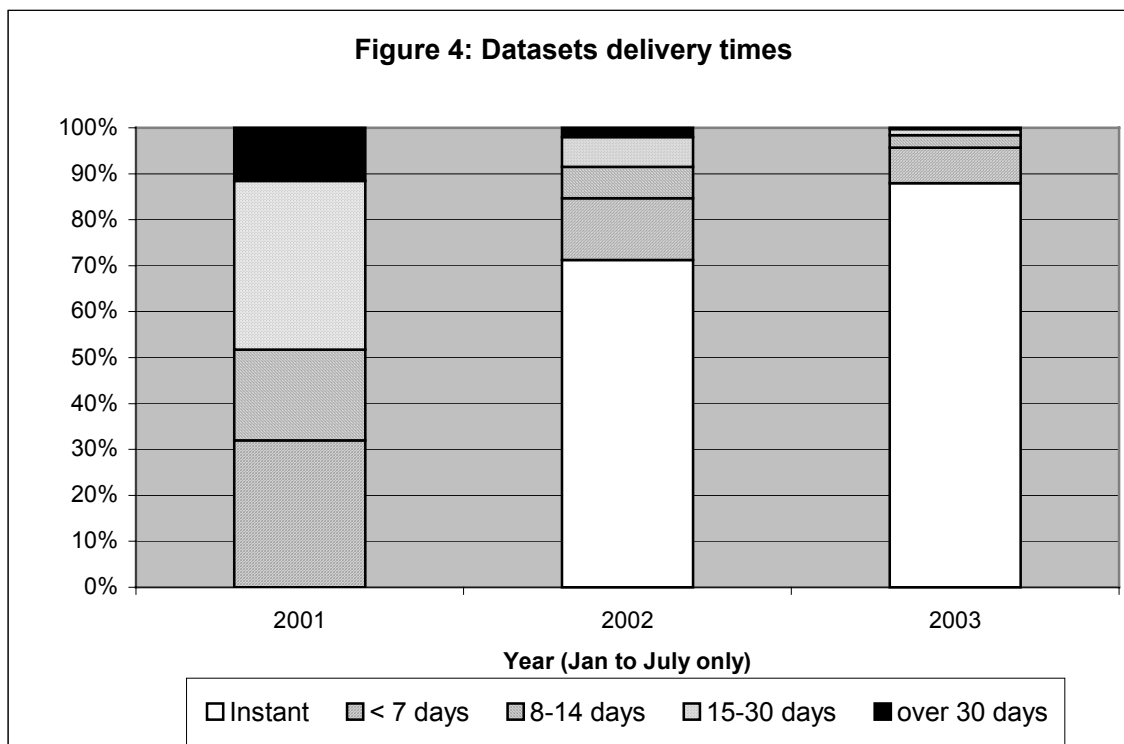
In considering these KPIs for the present reporting period, first it should be noted that an initial user survey was conducted by ESDS in March 2003. The survey aimed to gather feedback from current and potential users of social and economic data on the relevance of the data and support services planned by each of the four ESDS specialist data functions. The results of the surveys were much welcomed by the ESDS teams. Not only have they helped confirm and consolidate the deliverables already drafted for the services (see the report on stated milestones in section 3 of this report) they have helped pinpoint more precisely priorities for both data enhancement work and for planning support activities and resources. Future ESDS milestones and deliverables will be considered in the light of this consultation. The full report, *Assessing and Analysing Social and Economic Data: Users' Needs Uncovered* is available at: <http://www.esds.ac.uk/news/UserSurveyRep.pdf>

In order to place the first seven months of ESDS in a broader context, it is possible to compare figures for services under ESDS with previous years of the UKDA service. Considering first the number of datasets delivered, Figure 1 illustrates that in the 7-month period January to July 2003 9,682 datasets were disseminated to users. This is a rise of nearly a third from the first seven months of the previous year, and is part of a trend of rapidly increased use of the UKDA/ESDS which started in 2000/01. Likewise, as one might expect given this rise in data disseminated, the volume of orders serviced, or data requests has also risen sharply: up to 7,203 in this reporting period, a doubling on the first seven months of 2002. Both of these rises are in large measure primarily a result of improvements in the registration and ordering systems implemented by the UKDA and the introduction of on-line download systems, making it much easier and quicker for users to gain access to data. Particularly encouraging is the fact that these improvements have also witnessed an increase in the number of distinct individuals making data requests from ESDS. The number of distinct users in January-July

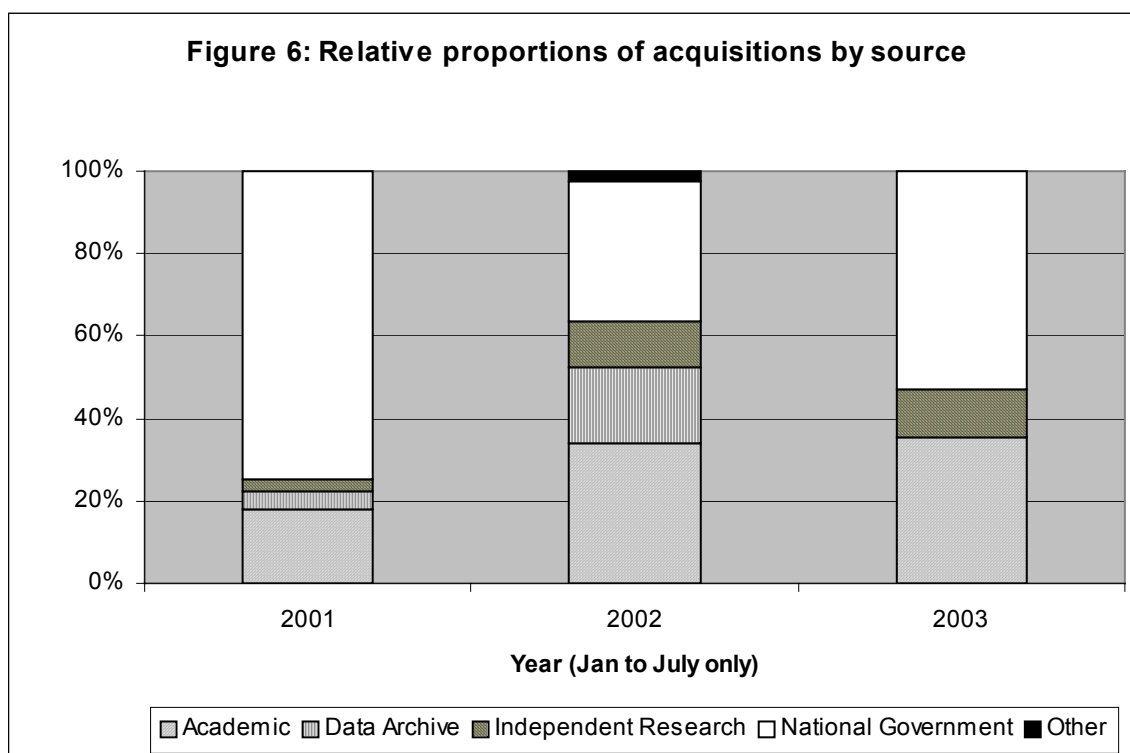
2003 was 1,196, an increase of 30 per cent from the comparable figure for 2002 and up from 673 for 2001.



The improvements in providing access to data are also reflected in Figure 4 which shows delivery times for datasets. In the 7-month period covered by this report, some 88 per cent of dataset requests were delivered ‘instantly’ via online download, with only 1.5 per cent having a delivery period of over two weeks. Whereas in the comparable period for 2001 only 52 per cent of data requests were delivered to users within two weeks.



Turning to acquisitions, Figure 5 and 6 show the number and proportion of new datasets by type or source of data. In the first seven months of 2003 a total of 93 new datasets were acquired, a figure roughly similar to that for 2002 (the figure for 2001 is rather atypical since a large quantity of regressed QLFS datasets were received in this period). This figure excludes additional new NS Databank editions and other new editions of existing datasets, of which there were 127 and 55 respectively. Of the new acquisitions in the reporting period just over a half came from government departments and just over a third from academic researchers. The biggest change is the decrease in the number of new acquisitions coming from other overseas data archives. This decision to stop archiving collections from overseas archives locally has been brought about by technological changes which have made the process of acquiring data from foreign data archives more efficient. This efficiency gain has meant that pro rata more data collections can be acquired from UK sources.



The most popular twenty datasets distributed are listed in the table below. This shows great consistency with recent years, with 14 of these top 20 studies being in the top 20 list of 2002, and equally, 14 in the list for 2001.

Twenty most popular data series January – July 2003	
1. Quarterly Labour Force Surveys	11. British Household Panel Survey
2. General Household Survey	12. Digest of Welsh Historical Statistics
3. Family Expenditure Survey	13. Youth Cohort Study of England and Wales
4. Eurobarometer Survey Series	14. 1971 Census
5. British Social Attitudes Survey	15. National Child Development Study
6. British Election Studies	16. National Food Survey
7. British Crime Survey	17. Northern Ireland Life and Times Survey
8. Health Survey for England	18. 1970 British Cohort Study (BCS70)
9. Family Resources Survey	19. Workplace Employee Relations Survey
10. Great Britain Historical Database Online	20. Farm Business Survey

8) LOOK FORWARD

Although this report covers the period January to July 2003, it was not requested until late 2003 when the reporting cycle for ESDS was decided at a joint ESRC/JISC/ESDS Troika meeting. As a result, in looking forward the main consideration in what follows is the calendar year 2004 rather than the immediate period from August 2003.

Obvious ESDS will carry on the fundamental tasks that combine to make up the service: data acquisition, data dissemination, user support, data enhancement; promotion; training; liaison with stakeholders. Plans and timings for aspects of these are detailed in the Milestones for 2004 which are provided in Appendix IV to this report.

In addition to these 'core' tasks of ESDS, it is appropriate to draw attention to other areas that the service will be taking forward over the course of 2004.

Strategic Plan – A strategic plan for ESDS will be produced which integrates as appropriate with the respective ESRC and JISC strategic plans as well as the plan for the ESRC RRB. An outline for this will be submitted to the ESRC for consideration in early February and this will be subsequently developed in discussion with the ESDS Advisory Committee, the ESRC and JISC.

Charging – The service provided by provided by ESDS are free at the point of service to UK HE and FE users. However, funding is not provided in order to service individuals from outside of this sector, including overseas academics and those in the local and central government sectors. Given the requirement for ESDS to run an Athens compliant authentication system – which will be fully implemented from May 2004 - this poses a significant problem as registering people outside of UK HE/FE with Athens identifiers incurs a real cost to the service. Thus, some form of charging will most likely be necessary in order to recover these costs. This has already been discussed at a Troika meeting and at an ESDS Advisory Committee meeting and the general principle that certain key user groups such as overseas academics and those in central government departments should also have a 'free at the point of access' service has been suggested. Following on from these discussions a full charging policy for ESDS will need to be drafted and agreed.

Advisory Committee – An ESDS Advisory Committee has been formed under the chairmanship of John Pullinger of ONS. A full list of members is given in Appendix III of this report. In order to capitalise on the expertise of the Committee over the course of 2004 it is planned to explore establishing a number of small 'working group' to tackle and advise on specific areas, as well as to explore the possibility of nominating 'link' Committee members on certain aspects of ESDS work.

ESRC Information Centre - Following a competitive tendering process, over the course of 2004 the ESRC will start work on creating a new Information Centre. This will renew, revise and replace certain aspects of the existing information infrastructure. It is critical that this process joins up with the ESDS remit to develop a 'universal' data portal and it is therefore a high priority for ESDS to input into the emerging plans for the new Information Centre.

E-Social Science - An important task for the ESDS during 2004 and in future years will be to engage with and support the work of the new National Centre for e-Social Science and its future node projects.

National Data Strategy – As part of the process of developing its own Data Collections Policy, it will be important for the ESDS to take an active role in the development of the National Data Strategy. In relation to this, another goal is to move forward the plans already discussed with the

ESRC to establish a Datasets Policy implementation plan in which ESRC awards which incorporate data creation are appraised for potential acquisition at the beginning of the award period rather than after the award has finish.

Strategic Partnerships – As ESDS matures it will both develop and extend the relationships it has with strategic partners. This includes the establishment and maintenance of effective and productive working relationships with organisations including ONS, TNA, CASS Q-bank, BL, ICPSR, CESSDA, MRC, NERC data centres, DCC, USLC, IoE, ESRC Programmes and Centres and the Research Methods Centre.

9) SUMMARY OF ANY ACTION BEING REQUESTED FROM THE RESEARCH RESOURCES BOARD OR ESRC/JISC MORE WIDELY.

A number of points raised in the previous section require input from the ESRC and or JISC. In this regard one the key factors that concerns ESDS is that the service is 'joined-up' effectively with other parts of areas of both ESRC and JISC activity and investment. These include the following:

- ensuring that ESDS is proactively linked into forthcoming programmes (eg World Economy and Finance, RLU etc.);
- ensuring that JISC effectively promote ESDS resources through their Information Environment;
- interoperation with the new ESRC Information Centre;
- engaging with ESRC's e-Science strategy (ie grid enabling key datasets to support development of e-Social Science);
- input into the emerging National Data Strategy;
- ensuring clarity between the roles of the ESDS and separate investments relating to longitudinal data support and development.

Appendix I - A LIST OF STAFF

Unit	Surname	First name	Job title	Grade	pt	FTE	Start date	End date	Function
UKDA	Ageer	Lenin	Systems & Application Developer	CO2	13	1	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Ahmad	Nadeem	Online Services Development Officer	OR1	7	0.5	01/01/2003	31/07/2003	ESDS Qualidata
UKDA	Ahmet	Mustafa	Systems & Preservation Administrator	CO2	12	0.8	01/03/2003	31/07/2003	ESDS Access & Pres.
UKDA	Austin	Birgit	Data & Support Services Assistant	CSO3	6	0.25	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Backhouse	Gill	Senior Acquisitions & Liaison Officer	OR2	13	0.8	01/01/2003	31/07/2003	ESDS Qualidata/Access & Pres.
UKDA	Berry	Kim	Resource Services Officer	CS5	5	0.75	01/01/2003	31/07/2003	ESDS Management
UKDA	Bolton	Sharon	Senior Data & Support Services Officer	OR2	12	1	01/01/2003	31/07/2003	ESDS Access & Pres./Government
UKDA	Cadogan	Sue	Senior Acquisitions Officer	OR2	10	1	01/01/2003	31/07/2003	ESDS Government/Access & Pres.
UKDA	Clary	Jo	Data & Support Services Officer	OR1	9	0.8	01/01/2003	31/07/2003	ESDS Access & Pres.
MIMAS	Cole	Keith	Associate Director	ALC5	26	0.3	01/01/2003	31/07/2003	ESDS International
UKDA	Corti	Louise	Assistant Director, Head of Outreach, Training & Qualidata	OR5	23	1	01/01/2003	31/07/2003	ESDS Qualidata/Management
UKDA	Crockett	Alasdair	Data Services Manager*	OR3	17	0.6	01/04/2003	31/07/2003	ESDS Access & Pres./Longitudinal
UKDA	Dennison	Karen	Acting Support Services Manager	OR2	14	1	01/07/2003	31/07/2003	ESDS Access & Pres.
UKDA	Eastaugh	Kay	Data & Support Services Officer	OR1	7	0.55	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Edge	Teresa	PA to Director/Department Co-ordinator	CS5	3	0.8	01/04/2003	31/07/2003	ESDS Management
UKDA	Edge	Teresa	PA to Director/Department Co-ordinator	CS4	7	0.8	01/01/2003	31/03/2003	ESDS Management
UKDA	Etheridge	Anne	Outreach & Promotions Assistant	CS4	6	0.8	01/01/2003	31/07/2003	ESDS Management
UKDA	Flaxton	Claire	Secretary	CS2	5	0.69	01/01/2003	31/07/2003	ESDS Management
UKDA	Garcia-Bernabe	Myriam	Senior Data & Support Services Officer	OR2	11	1	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Herbert	Judith	Resource Services Assistant	CS2	5	0.63	01/01/2003	31/07/2003	ESDS Management.
CCSR	Higgins	Vaness	Research Associate	RA1A	11	1	13/02/2003	31/07/2003	ESDS Government
UKDA	Holden	Phil	Systems & Preservation Administrator	CO2	13	1	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Jack	Sharon	Web Resources Officer	OR1	9	0.6	01/01/2003	31/07/2003	ESDS Management
UKDA	King	Mike	Systems and Preservation Manager	OR3	18	1	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Kneeshaw	Jack	Senior Data & Support Services Officer	OR2	10	1	01/01/2003	31/07/2003	ESDS Access & Pres./Longitudinal
CCSR	Li	Yaojun		RA1A	12	0.2	01/04/2003	31/07/2003	ESDS Government
UKDA	Liver Pitchikan	Kosigin	Systems & Application Developer	OR2	11	0.5	01/01/2003	31/07/2003	ESDS Access & Pres.

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UKDA	Miller	Ken	Information Systems Development Manager*	CO3	20	0.5	01/04/2003	31/07/2003	ESDS Management.
UKDA	Miller	Pam	Metadata Standards & Resource Discovery Manager	OR3	18	0.66	01/04/2003	31/07/2003	ESDS Management
UKDA	Mason	Paul	Qualitative DSS Officer	OR1	5	0.6	01/01/2003	31/07/2003	ESDS Qualidata
UKDA	Musgrave	Catherine	Data & Support Services Assistant	CS2	7	0.4	01/01/2003	31/07/2003	ESDS Longitudinal/Government
MIMAS	Noble	Susan	International Data Support Officer	ALC1	6	1	31/03/2003	31/07/2003	ESDS International
UKDA	Pasotti	Annette	Data & Support Services Officer	OR1	7	1	01/01/2003	31/07/2003	ESDS Access & Pres.
MIMAS	Russell	Celia	International Data Content Developer	ALC2	12	0.7	01/01/2003	31/07/2003	ESDS International
MIMAS	Schumm	Jim	Interface and Database Developer	ALC2	12	0.6	01/01/2003	31/07/2003	ESDS International
UKDA	Schürer	Kevin	Director, ESDS*	ACPR		1	01/01/2003	31/07/2003	ESDS Management
UKDA	Southall	John	Senior Qualitative DSS Officer	OR2	13	1	01/01/2003	31/07/2003	ESDS Qualidata
MIMAS	Tampubolon	Gindo	Statistics Support Officer	ALC2	11	1	01/01/2003	31/03/2003	ESDS International
MIMAS	Tampubolon	Gindo	Statistics Support Officer	ALC2	11	0.2	01/04/2003	31/07/2003	ESDS International
CCSR	Wathan	Jo	Research Fellow	RA1A	9	0.4	01/01/2003	31/07/2003	ESDS Government
UKDA	Weston	Colin	Resource Services Officer	CS5	7	1	01/01/2003	31/07/2003	ESDS Management
UKDA	Wilkinson	Christine	Administrative Assistant	CS4	3	0.8	01/01/2003	31/07/2003	ESDS Access & Pres.
UKDA	Wright	Melanie	Assistant Director, Head of Data & Support Services	OR5	25	1	01/01/2003	31/07/2003	ESDS Access & Pres.

Professor Nick Buck of ISER (Essex) and Professor Angela Dale of CCSR (Manchester) also provide input into the management and strategic planning of ESDS Longitudinal and ESDS Government, respectively.

* = Post is part of the host University contribution.

Appendix II - OUTREACH ACTIVITIES

Events that ESDS has organised or contributed to during the period January – July 2003

- ESDS Away-day, 21-22 January
- Surrey Master's Programmes Day Conference, 28 February
- ESDS/Question Bank meetings, March and May
- JISC Conference 2003, 4 March
- The Friday PhD Mini-Course Qualidata and UKDA, 21 March
- Longitudinal studies day, 4 April
- Health A joint meeting with the Labour Market Statistics User Group, 2 May
- ESDS Qualidata Workshop at IASSIST 2003: everything you wanted to know about process qualitative data but were afraid to ask, 27-30 May
- Using Archived Data Sources for Teaching and Learning, 4 June
- Data Sources for Secondary Analysis for Social Scientists, 12 June
- Data Sources for Secondary Analysis for Social Scientists, 12 June
- ESDS Launch, 30 June
- Surveys User Group – July 2003 (about 70 people attended and some excellent speakers. A Health Surveys User group is being established as a result with the first meeting in January)
- Presentations on ESDS services at MIMAS Open Forum, 2 July
- Poster session at BHPS Research Conference, 3-5 July
- The Health Surveys of England, Scotland and Wales, 11 July
- Poster session at the Social Policy Association conference 15 July
- Presentations on ESDS services as part of Archives Awareness day, Univ. Essex, 18 July
- A one day topic-based workshop (Theme: employment and labour markets) was run in Manchester, 21 July
- Using Government Surveys and International Datasets for Research, 21 July
- Seminar on ESDS for Essex Summer School, 9 July and 23 July
- ESDS hands-on workshop for Essex Summer School course, 24 July

Appendix III - ESDS Advisory Committee Members

Sheila Anderson

Arts and Humanities Data Service

Professor Sara Arber

University of Surrey

Richard Blundell

Institute for Fiscal Studies

Professor John Curtice

University of Strathclyde

Professor Nigel Fielding

University of Surrey

Peter Halls

University of York

Brian Hayes

Borough of Charnwood

Professor Tony Hey

Engineering and Physical Sciences Research Council

Corrine Moy

National Opinion Polls

Dr David Pullinger

Office for National Statistics

John Pullinger

Office for National Statistics, Chair

ESDS Representatives

Professor Nick Buck – ESDS Longitudinal

Keith Cole – ESDS International

Louise Corti – ESDS Qualidata

Professor Angela Dale – ESDS Government

Professor K. Schürer – ESDS Management

Melanie Wright – ESDS Access and Preservation

Appendix IV - ESDS Milestones for 2004

ESDS Access and Preservation

January – April 2004

- Implementation of new quality control procedures for catalogue records
- Commission of larger dissemination preservation front end server to cater for the expected increase in holding in the next three plus years (old system approx 500GB holdings, new system capacity for 1500GB (1.5TB) with easy add on expansion capacity for another 3000GB (3TB))
- Full automation of preparation and update of fully processed datasets onto download server at time of data release
- Automation of creation of citation, disclaimer, and study description metadata, and automatic updating of this metadata file whenever changes are made
- Launch of new data and documentation processing database CALM
- Launch of new Negotiations/Acquisitions database MIRAGE
- Launch of fault-tolerant, network-load-balanced NESSTAR service running on twin load-balanced servers
- Launch of new electronic deposit forms, to streamline and assist in deposit of datasets
- Launch of depositor help webpages
- Migration of web services to network load balanced service. Staged migration of www.esds.ac.uk and www.data-archive.ac.uk and other UKDA hosted web sites (go-geo etc.)
- All Workstations (full time staff) will upgraded to minimum spec of P4 running at 1.5GHz and a typical spec of P4 running at 2.4GHz both with a minimum of 256 RAM.

May - July 2004

- Completion of new user database
- Launch of new ordering system
- Launch of new download access control system
- Launch of new Athens authentication
- Launch of new Athens issuing service for non HE/FE and non-UK users
- Implementation of new charging policy
- Release of final “One Stop Shop” registration.
- Automatic generation of UKDA metadata (merging of citation/disclaimer/titlepage/readfile/access info into one structured UKDA dataset documentation file automatically generated at processing)
- Automatic updating of UKDA metadata and download server when any changes/modifications/improvements are made to data or documentation.

August - October 2004

- Replacement of our main preservation server with higher spec, better performing machine
- All workstation operating systems will be upgraded to Windows XP Pro except for a few that will be used for compatibility testing
- Version 2 of query tracking database implemented.

November 2004 – January 2005

- Upgrade of all existing workstation MS-Office installations to Office 2003
- Version 2 of catalogue input programs implemented.

Ongoing:

- Acquire an average of 95 'core' data collections per annum
- Process 20 % of studies acquired for Core dissemination to UKDA level C
- Process 80 % of studies acquired for Core dissemination to UKDA level B
- Prepare all studies acquired for dissemination via value-added service to UKDA level A*, A or B, as per recommendation of Acquisitions Review Committee
- Prepare all studies acquired for preservation
- Catalogue all studies and index all studies acquired
- Scan any paper documentation of studies acquired
- Convert documentation all studies acquired to PDF, and book-mark
- Produce Read and Note files for all studies acquired
- Proof-read and quality check all catalogue entries
- Mount electronic documentation on web and link to catalogue record
- Create and analyse logs of preservation media
- Maintain information security standard watch
- Place all newly acquired studies on instant download service
- Place backlist studies on instant download service when ordered by users
- Write bespoke CD-ROMs/DVDs for ordered data on request
- Mount datasets in Nesstar for large-scale government function
- Produce, maintain and update web-based FAQs
- Place dataset User Guides on-line for instant access and download
- Log and monitor all user queries received.

ESDS Government (CCSR)

January – April 2004

- Maintenance and development of web-site, in particular the survey web pages
- Hold first Health Surveys User Group Meeting
- Deliver 1-day course on STATA
- Develop and deliver 1-day weighting meeting
- Update and extend web-based FAQs
- Initial development of interactive web-based visualization interface for vital statistics with sub-regional geographies
- Initial development of an index of variables consistent with census and consistent over time.

May – June 2004

- Introductory workshop on large-scale government datasets
- This will provide a hands-on introduction to analysis skills
- Introductory workshop on one-day course on analysis of hierarchical household surveys
- Topic-based workshop – year 2 theme - health
- Produce third ESDS Government newsletter
- Produce second theme-based introductory guide on the theme of health
- Deliver 1-day course on SPSS
- Deliver 1-day meeting on data linkage and fusion
- Produce methodological guide – the use of weighting in government surveys.

August – October 2004

- Update and extend introductory web-based guides to SPSS and STATA
- Update and extend first theme-based introductory guide: employment and the labour market
- Produce teaching dataset for the Health Survey for England
- Finalise development of interactive web-based visualization interface for vital statistics with sub-regional geographies
- Initial development of additional variables to enhance linkage across time and across datasets – this will extend into year 3.
-

November 2004 – January 2004

- Hold Research Conference on health related issues
- Produce fourth ESDS Government newsletter
- Finalise index of variables consistent with census and consistent over time
- Develop and hold second LFS User Group meeting.

Ongoing:

- General liaison with ONS over quality profiles, metadata, STATbase, annual conference, new survey developments
- Courses in statistical analysis at CCSR
- Maintaining operational helpdesk & email lists
- Advice on data management and statistical analysis
- Maintaining virtual user group and discussion list
- Presentations at conferences/awareness raising.

ESDS Government (UKDA)

Ongoing from January 2004

- Acquire an average of 35 large-scale government data collections per annum
- Process 20 % of large-scale government studies acquired for dissemination to UKDA level B
- Process 80 % of large-scale government studies acquired for dissemination to UKDA level A/A*
- Prepare all studies acquired for preservation
- Catalogue all studies acquired to agreed international standards
- Index all studies acquired in accordance with HASSET
- Scan any paper documentation of studies acquired
- Convert documentation all studies acquired to PDF
- Book-mark all documentation PDF files
- Produce Read and Note files for all studies acquired
- Proof-read and quality check all catalogue entries
- Mount electronic documentation on web and link to catalogue record
- Preserve data and metadata for all studies acquired
- Place all newly acquired studies on instant download service
- Place backlist studies on instant download service when ordered by users
- Write bespoke CD-ROMs/DVDs for ordered data on request
- Mount an average of 12 large-scale government datasets in Nesstar per annum
- Log and monitor all user queries received

ESDS International (MIMAS)

January – April 2004

- Provision of web based access to World Bank data (WDI and GDF)
- Provision of web based access to additional OECD datasets
- Produce supporting material for World Bank, and OECD datasets
- Plan and organise 1st annual conference/workshop
- Establishment of an advertised training programme
- Complete introductory and data analysis courses
- Create searchable metadata for World Bank and OECD datasets
- Install and test WDS version 7
- Conclude licence agreement for Eurostat New Cronos.

May – July 2004

- Provision of web based access to IMF BOPS data
- Provision of web based access to UN Common Database
- Provision of web based access to ILO KILM Database
- Produce supporting material for IMF BOPS, KILM and UN Common Database
- Create searchable metadata for IMF BOPS, KILM and UN Common Database
- Run introductory and data analysis courses
- Undertake review of requirements to support teaching use of service
- Release WDS version 7.

August – October 2004

- Provision of web based access to IMF GFS data
- Provision of web based access to Eurostat New Cronos
- Produce supporting material for IMF GFS and Eurostat datasets
- Create searchable metadata for IMF GFS and Eurostat datasets
- Production of first web-based themed guide (eg classification systems)
- Development of second themed data exploration/visualisation application
- Update guide to international data resources
- Run first annual conference/workshop
- Production of annual report
- Update factcard for 2004/05 academic year
- Update courses for 2004/05 academic year
- Establishment of an advertised training programme for 2004/05 Semester 1.

November 2004 – January 2005

- Development of first web-based case study
- Delivery of introductory and data analysis courses
- Establishment of an advertised training programme for 2004/05 Semester 2.
- Development of key time series for alternative classifications
- Development of support materials on linking macro and micro datasets – subject to requirements analysis
- Guide to using international macro data in teaching (using Excel).

ESDS International (UKDA)

Ongoing from January 2004

- Acquire international micro-data from sister archives internationally in accordance with user requests
- Catalogue regular repeating international microdata series to agreed international standards
- Index all studies acquired in accordance with HASSET
- Proof-read and quality check all catalogue entries
- Write bespoke CD-ROMs/DVDs or provide ftp/download services for ordered data on request
- Log and monitor all user queries received, and refer users to custodial archive for support, where appropriate.
- Contribute to International Data Function promotional events, reports, and materials, as appropriate.

ESDS Longitudinal

January – April 2004

- Hold meeting on survey weighting (joint activity with large-scale government service)
- Hold 2-day ‘data confrontation’ training course on use of BCS70/NCDS.

May – July 2004

- New release of sampler dataset for BHPS
- Hold awareness days for new users of longitudinal data
- Hold 2-day ‘data confrontation’ training course on use of BCS70/NCDS.

August – October 2004

- Release of first wave of English Longitudinal Study of Ageing.

November 2004 – January 2005

- Hold awareness days for new users of longitudinal data
- Hold 2-day ‘data confrontation’ training course on use of MCS.

Ongoing:

- Appraise potential additions to longitudinal data collection
- Provide support for longitudinal data users via help desk
- Continue to develop web-based user aids
- Continue to manage user specific email lists

ESDS Management

January - April 2004

- Submit Quarterly Report to ESRC
- Submit quarterly SLD statistics to JISC MU
- Produce new issue of Newsletter
- Produce interim ESDS Report (Jan – July 2003)
- Submit outline for new ESDS Strategic Plan ESRC and JISC.
- Hold two workshops on Creating and Depositing data
- Hold two workshops for new researchers/data users

May - July 2004

- Submit Quarterly Report to ESRC
- Submit quarterly SLD statistics to JISC MU
- Produce new issue of Newsletter
- Meet with ESRC Information Centre to agree plan for interoperability between web development work of Information Centre and ESDS
- Second release of Athens compliant one-stop registration system, applied across whole ESDS
- Hold cross-service meetings for all ESRC research resource providers in order to ensure interoperability between services (and annually thereafter)
- Submit finalised ESDS Strategic Plan (harmonised with RRB Strategic Plan) to ESRC/JISC
- Finalise Data Collections Policy in line with ESDS and ESRC Strategic Plans and ESRC National Data Strategy
- Hold ESDS Advisory Committee meeting
- Hold ESDS 'outreach' events as part of Social Science week
- Hold two workshops on Creating and Depositing data
- Hold two workshops for new researchers/data users.

August - October 2004

- Provide KPIs for first full reporting year of ESDS
- Produce Annual Report for first full reporting year of ESDS
- Submit Quarterly Report to ESRC
- Submit quarterly SLD statistics to JISC MU
- Produce new issue of Newsletter
- Produce first full ESDS Annual Report (August 2003 to July 2004)
- Hold two workshops on Creating and Depositing data
- Hold two workshops for new researchers/data users.

November 2004 - January 2005

- Submit Quarterly Report to ESRC
- Submit quarterly SLD statistics to JISC MU
- Produce new issue of Newsletter
- Hold ESDS Advisory Committee meeting
- Hold Annual ESDS User Forum meeting
- Hold workshop on Creating and Depositing data
- Hold workshop for new researchers/data users.

Ongoing:

- Provide central management support for whole of ESDS
- Ensure effective and regular communication between distributed ESDS activities
- Liase with funders and other stake-holders as required
- Review data acquisitions policy in the relation of overall user needs and ESRC/JISC strategies
- Review metadata standards and implementation of metadata standards in relation to ESRC/JISC strategies
- Oversee and advise across ESDS on metadata standards and procedures.

ESDS Qualidata

January – April 2004

- Prepare report on the development of a DTD (DDI/TEI) for web delivery of qualitative data presented at conference and opened up for consultation
- Finalise Phase II development of Qualidata Online system - extension of Edwardians Online to enable cross-searching and browsing of multiple datasets, plus usability testing
- Produce downloadable step-by-step guide to using the Qualidata Online system,
- Produce document on getting started with re-analysing qualitative data on the theme, Social Class and Social Change
- Develop teaching dataset on qualitative social class and social policy data resources
- Finalise and fully integrate Create and Deposit ESDS Qualidata web pages with ESDS top level website
- FAQ and advice on informed consent and confidentiality
- Hold one-day conference, *Online Access to Qualitative Data: Opportunities and Challenges*
- Hold ESDS Qualidata demonstration at Annual JISC Conference
- Run archiving data session at Royal College of Nursing, Cambridge
- Run postgraduate day course on re-using qualitative data from classic sociology studies, Essex
- Hold a focus group on re-using community studies data, and write up for web.

May – July 2004

- Hold ESDS Qualidata Advisory Committee meeting
- Present report on the development of a DTD (DDI/TEI) for web delivery of qualitative data to IASSIST
- Prepare report on production of dedicated web pages and FAQ on enhanced data collections
- Finalise transfer of Qualicat online catalogue records to UKDA DDI compliant catalogue
- Host workshop on using qualitative data archives with Atlas-ti
- Run ESDS Qualidata hand-on workshop at summer school, Essex
- Run hands-on workshop re-using qualitative data resources (ESRC social science week)
- Contribute to ESDS Session at ESRC Methods Festival, London
- Contribute to ESDS Session at MIMAS Open Forum, Manchester
- Contribute to report on grid enabling qualitative data collections held under ESDS.

August – October 2004

- Hold one day conference on consent and confidentiality and data archiving with RCBN, Cardiff
- Host ESDS Qualidata hand-on workshops on re-using social class and social policy data collections, summer school, Essex
- Run 2 conference sessions organised on sharing qualitative data and secondary analysis of qualitative data – International Methodology Conference, Amsterdam
- Develop web-based thematic resource and user guide for health data.

November 2004 - January 2005

- Develop teaching datasets on qualitative health data resources
- Workshop on using qualitative data archives with Atlas-ti – joint event with CAQDAS working group.

Ongoing:

- Maintain and develop of ESDS Qualidata website
- Maintain operational helpdesk & email lists
- Maintain virtual user group and discussion list
- Up-date and extend introductory guides.
- Enhance data to level QA for social class and social change datasets – loading into Qualidata Online system.
- Contribute to ESDS workshops on 5+ Creating and Depositing data (see ESDS Management and Coordination)
- Contribute to 5+ ESDS workshops for new researchers/data users see ESDS Management and Coordination
- Contribute to 3+ ESDS sessions and hands-on workshop for SOSIG roadshows
- Present invited and submitted papers/posters/workshops at conferences and events
- Contribute to ESDS Newsletter and other media outlets
- Liaise with teaching and learning communities, e.g. FE, over kinds of support materials required
- Liaise with community over data and metadata standards for qualitative data.