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Abstract

This document marks the start of overall project evaluation activities in Task T7.5 *Project Evaluation* in collaboration with the User Advisory Panel. It first summarises the projects overall objectives, KPIs and audience categories. It then outlines methodologies for evaluation and a proposed strategy and an implementation plan for what we will evaluate during the second and third year of the project.

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V. APPLICATION AREA

This document is a formal output for the European Commission, applicable to all members of the Europeana Sounds project and beneficiaries. This document reflects only the author's views and the European Union is not liable for any use that might be made of information contained therein.

VI. DOCUMENT AMENDMENT PROCEDURE

Amendments, comments and suggestions should be sent to the authors named in the Delivery Slip.

VII. TERMINOLOGY

A complete project glossary is provided at the following page:

<http://pro.europeana.eu/web/guest/glossary>

Further terms are defined below as required:

TERM	DEFINITION
AB	Advisory Board
APEX	Archives Portal Europe network of excellence
EC-GA	Grant Agreement (including Annex I, the Description of Work) signed with the European Commission
GA	General Assembly
PC	Project Coordinator
PI	Performance Indicator
PM	Project Manager
PMB	Project Management Board
PSO	Project Support Officer
TEL	The European Library
TD	Technical Director
UAP	User Advisory Panel
WP	Work Package

VIII. PROJECT SUMMARY

Europeana Sounds is Europeana's 'missing' fifth domain aggregator, joining APEX (Archives), EUscreen (television), the Europeana film Gateway (film) and TEL (libraries). It will increase the opportunities for access to and creative re-use of Europeana's audio and audio-related content and will build a sustainable best practice network of stakeholders in the content value chain to aggregate, enrich and share a critical mass of audio that meets the needs of public audiences, the creative industries (notably publishers) and researchers. The consortium of 24 partners will:

- Double the number of audio items accessible through Europeana to over 1 million and improve geographical and thematic coverage by aggregating items with widespread popular appeal such as contemporary and classical music, traditional and folk music, the natural world, oral memory and languages and dialects.

- Add meaningful contextual knowledge and medium-specific metadata to 2 million items in Europeana's audio and audio-related collections, developing techniques for cross-media and cross-collection linking.
- Develop and validate audience specific sound channels and a distributed crowd-sourcing infrastructure for end-users that will improve Europeana's search facility, navigation and user experience. These can then be used for other communities and other media.
- Engage music publishers and rights holders in efforts to make more material accessible online through Europeana by resolving domain constraints and lack of access to commercially unviable (i.e. out-of-commerce) content.

These outcomes will be achieved through a network of leading sound archives working with specialists in audiovisual technology, rights issues, and software development. The network will expand to include other data-providers and mainstream distribution platforms (Historypin, Spotify, SoundCloud) to ensure the widest possible availability of their content.

For more information, visit <http://pro.europeana.eu/web/europeana-sounds> and <http://www.europeanasounds.eu>.

IX. STATEMENT OF ORIGINALITY

This document contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

X. EXECUTIVE SUMMARY: EVALUATION REPORT 1

Evaluation is a key element within the Europeana Sounds project. Several of this project's Work Packages have evaluation activities built into the tasks, and there are a number of project Deliverables and Milestones on the evaluation of those Work Packages. In WP7, a specific task T7.5 that started in project Month 12 (M12) is dedicated to project evaluation. It will provide additional monitoring of project progress and delivery of outcomes and an assessment of impact.

This report summarises the project aims, audiences and progress metrics, examines ways to measure impact, and provides an initial plan for the quantitative and qualitative measuring of progress and impact during the project, including online surveys, focus groups, User Advisory Panel feedback, and an independent external assessment.

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1 INTRODUCTION

Evaluation is a key element within the Europeana Sounds project. In addition to the regular project progress reports submitted mid-year and at each year end, and the Annual Project reviews evaluated by the European Commission, evaluation activities are built into each of the Work Packages, and a number of Deliverables and Milestones are focused on evaluating the impact of the activities within those Work Packages. These include the aggregation tools and processes, the implementation of semantic enrichment and the impact of the dissemination activities. Within WP7, a specific task led by the British Library is dedicated to overall project evaluation: T7.5 *Project Evaluation*. This task starts in January 2015 (M12), lasting for 24 months.

As specified in the Description of Work [REF 1], this task will entail evaluating each of the Work Packages against a set of criteria produced in consultation with the User Advisory Panel (see Description of Work, Project management, B3.3. [REF 1]). An external independent expert will be sub-contracted to assess project performance and the impact of the project from users' perspectives. The task will include a coordinating role for the evaluation elements of WPs 2, 4, 5 and 6. Evaluation Reports will be issued in M12 and M31 as D7.4 (this document) and D 7.7.

This document marks the start of overall project evaluation activities in T7.5. It outlines a proposed strategy and an implementation plan for the criteria we will evaluate during the second and third year of the project, and quantitative and qualitative methodologies for the evaluation. Evaluation should play a significant role in the project and the evaluation criteria used should fit comfortably alongside the project objectives. The user criteria should be made known to the project members at an early point in the evaluation cycle.

1.1 Project objectives

Europeana Sounds creates a much-needed gateway to Europe's incomparably rich sound and music collections. Many of Europe's leading cultural heritage institutions have large, high quality audio collections which are of great interest to a wide range of general and professional audiences, but access to them is fragmented and constrained. So, while audio is one of the most popular media types available through Europeana, it represents just 2% of Europeana's overall content. This project is the first time that technical specialists and European institutions with major audio collections have joined together to help solve this problem of access and availability.

Evaluation of the impact of the Europeana Sounds project should align closely to its six specific objectives:

1. **Aggregation:** provide a critical mass of digital audio tracks and supporting objects through Europeana to meet the needs of public audiences, creative industries and academic researchers.
2. **Enrichment:** support discovery and use by improving metadata through innovative methods including semantic enrichment and crowdsourcing.

3. **Access:** work with our data providers as well as publishers, the recorded music industry, rights holders, and libraries to improve access to out-of-commerce¹ audio content and increase the opportunities for creative re-use of Europeana content.
4. **Channels:** enhance the existing Europeana portal by implementing a mechanism for providing channels that enable specific user communities to discover, share and annotate digital audio content and which can be extended to address other communities of interest and media.
5. **Infrastructure:** underpin the technical infrastructure required to enable the aggregation of metadata from archived digital content, primarily music and speech audio, including out-of-commerce recordings and crowdsourced content, through the Europeana portal.
6. **Dissemination and networking:** expand the work of the Europeana Sounds Best Practice Network among target audiences, acting as a catalyst for the inclusion of a significant quantity of items from collection-holders not yet engaged with Europeana

1.2 Requirements, outcomes and expected impact

Set against the above objectives, the Europeana Sounds project should be evaluated on its success in addressing several requirements:

The project should (a) improve the efficiency and the level of automation of the aggregation processes in the current Europeana platform; (b) broaden its ability to handle time-based media and metadata; (c) amass a significant corpus of digital content in several thematic areas with significant appeal for the general public; (d) Ensure that accessible audiovisual material is better represented in Europeana; (e) provide recommendations on reducing barriers for worldwide digital access.

In terms of adding value and enrichment to make this content more readily accessible and discoverable, it should (a) develop innovative ways of making the assignment of metadata more robust and more scalable, both through automation using semantic web technologies and through crowdsourcing as well as (b) delivering the benefits of enrichment which are to be found in improving discovery and user experience; (c) improve the search, usability, visual design and accessibility of the Europeana portal, through the development of thematic channels.

In terms of collaboration, it should (a) reduce some of the non-technical barriers through collaboration with content providers and rights-holders (amongst others) and (b) work with third-party partners to trigger a range of opportunities for providing enhanced access through dedicated sound platforms.

In terms of legacy after the funding period, the project should result in a sustainable channel infrastructure for reaching specific communities of interest. This will necessitate developing a value proposition for the Best Practice Network, to sustain and expand the community of strong data providers, focussing on improving the environment in which Europeana operates for audio data

¹ Out-of-commerce content: content that is still in copyright but no longer available via commercial channels.

providers and end-users, by providing greater operational efficiency, improved audio aggregation services and an improved web interface.

The mitigations for breaking down these barriers, and the involvement of the different work packages in achieving a successful impact in these areas are outlined in Section 4 (Communication of the Evaluation Plan). The risks associated with achieving success have been documented in D7.2 *Risk Plan* [REF 3]

1.3 Project work plan

The work plan of Europeana Sounds is organised in seven interlinked work packages as shown below (source: REF 1).

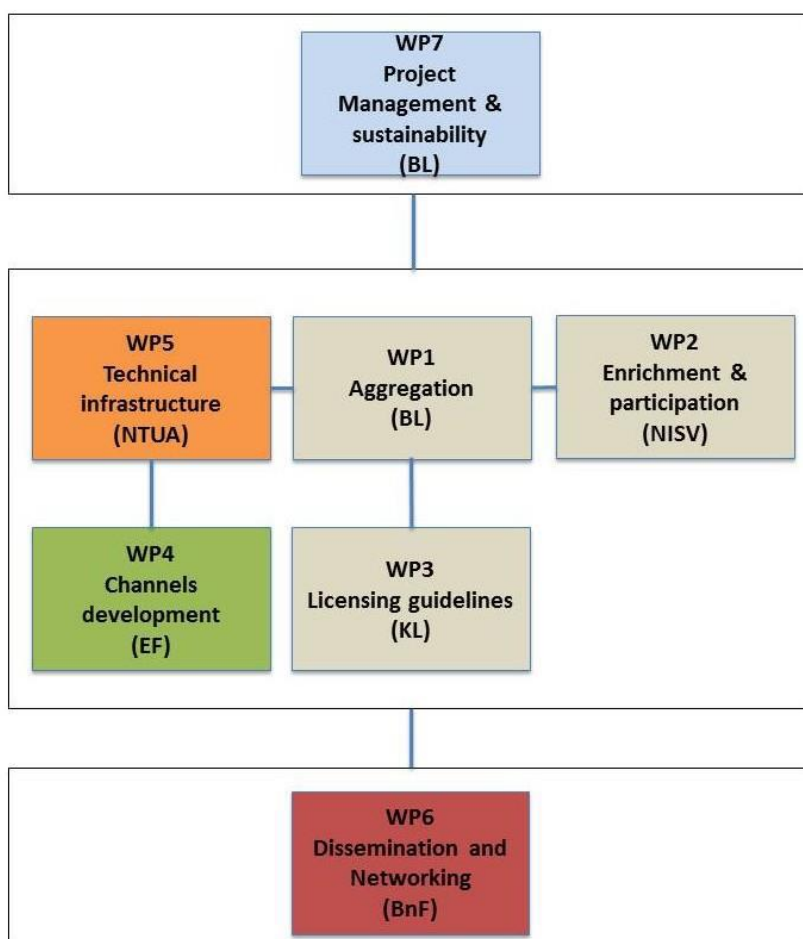


Figure 1 Work plan architecture

Each of WP1...WP6 maps directly to the six project objectives, while WP7 manages the project overall. Together, all work packages contribute to the overall vision of the project in terms of:

- Aggregation of a critical amount of content at scale and quality
- Metadata enrichment, improving discoverability, and adding value via Europeana Channels
- Collaboration with data providers, rights-holders to broaden access to hard-to-reach content
- Engaging with users, data providers and other audiences
- Ensuring a lasting legacy for the Best Practice Network

1.4 Specific Work Package objectives

The specific objectives for each Work Package are summarised below (from the Description of Work, WT3 [REF 1]):

Table 1: Work Package objectives

WP	WP title	WP Objectives
1	Aggregation	<p>The objective of this work package is to aggregate a critical mass of audio and audio-related metadata into Europeana and to establish a best practice model for future aggregation.</p> <p>Specific goals:</p> <ul style="list-style-type: none"> • Establish a framework for aggregating metadata for audio and related digital objects by defining and maintaining a content-selection policy including quantity, quality, subject matter, genre, language, geographical spread, public interest and Europeana Data Model (EDM) compliance, and help data providers resolve issues. • Improve discoverability by defining suitable ontologies for audio and audio-related content and to extend these where necessary. • Improve the workflow for aggregation of audio material by developing an EDM profile compatible with existing profiles for other time-based media. • Build critical mass by managing the aggregation of the audio and audio-related content identified in Table 0 as well as additional material that complies with the selection policy, and by managing the community of data providers for future expansion. • Expand availability for out-of commerce and domain-restricted content by working with WP3 (Licensing).
2	Enrichment & participation	<p>Support discovery and use by improving metadata through innovative methods including semantic enrichment and crowdsourcing.</p> <p>Design and implement mechanisms to improve the quality of existing metadata and contextual information.</p> <p>This will support enhanced exploration, deepen understanding of the collections, and will increase end-user engagement. Significantly increase quality of existing and</p>

WP	WP title	WP Objectives
		<p>new Europeana metadata for audio and audio-related items through: (a) active participation with existing audiences; (b) machine-driven tools.</p> <p>Specific goals</p> <ul style="list-style-type: none"> • Offer tools for metadata tagging and contextualisation to the wider community. This will (1) increase quality and user satisfaction in terms of content discovery; (2) promote increased engagement between institutions and their audiences. • Apply semantic web technologies to enable enrichment of the Europeana Sounds collections. This will increase quality of the metadata and user satisfaction in terms of content discovery. • Collaborate with Wikimedia chapters in Europe to add contextual knowledge on the Europeana Sounds collection. Six edit-a-thons (campaigns that aim to create wiki pages on focussed areas) will be organised in year two and three of the project. This will (1) add a layer of in-depth knowledge to the collections presented online; (2) strengthen links between Europeana, the Europeana Network and the international Wikipedia community. • Align music scores to text, to forge a dynamic connection between currently separated collections. By allowing for new types of exploration, the value for end-users of both the multimedia and digitised paper-based resources will be increased. • Explore possibilities of music information retrieval to support innovative, language independent exploration of audio collections. • Put in place policies and (in connection with WP5) infrastructural preconditions allowing enrichments to be re-ingested in the information systems of the contributing archives, wherever relevant.
3	Licensing guidelines	<p>This work package will work with our data providers as well as with publishers, the recorded music industry, rights holders, and libraries to improve access to out-of-commerce content and increase the opportunities for creative re-use of Europeana content.</p> <p>Specific goals</p> <ul style="list-style-type: none"> • Work with cultural heritage institutions and rights-holders (publishers and collective management organisations) to identify and reduce barriers to access to audio and related material held by European cultural heritage institutions • Make recommendations to address access to out-of-commerce and domain-constrained audio material and propose practical approaches to implement these recommendations • Ensure that the content that is aggregated by the project can be integrated in the existing Europeana Licensing framework.
4	Channels development	<p>This WP will enhance the existing Europeana portal by implementing a mechanism for providing channels that enable specific user communities to discover, share and annotate digital audio content and can be extended to address other communities of interest and other media.</p> <p>Specific goals</p> <ul style="list-style-type: none"> • The Europeana platform channels will, based on deliverables of other WPs, provide users with improved discovery functions (based on controlled vocabularies and semantic links), direct access to media, and the ability for users to annotate metadata records and media. Via federated search, users will be able to use these channels to access audio content from SoundCloud.

WP	WP title	WP Objectives
		<ul style="list-style-type: none"> • Create a plug-in application showcasing the audio and related content of Europeana implemented as a discovery/social tool using the application framework of the Spotify music service.
5	Technical infrastructure	<p>WP5 will underpin the technical infrastructure required to enable the aggregation of metadata from archived digital content, primarily music and speech audio, including out-of-commerce recordings and crowdsourced content, through the Europeana portal.</p> <p>Specific goals</p> <ul style="list-style-type: none"> • Extend the Europeana aggregation infrastructure through the creation of tools for monitoring the aggregation process, producing detailed statistics, checking consistency, creating persistent identifiers. • Enable metadata cleaning and normalisation. • Create a SKOS thesaurus for classification of music content. This will be used by Europeana to ingest contextual resources and multi-lingual labels and make them available for search. • Support the development of the crowdsourcing applications.
6	Dissemination & networking	<p>To work with the other work packages to extend the work of the Europeana Sounds Best Practice Network to its target audiences and act as a catalyst for the inclusion of a significant quantity of items from collection-holders not yet engaged with Europeana.</p> <p>This work package provides all the communication information needed to make Europeana Sounds comprehensible to its target audiences – the general public, GLAMs and other collection holders, rights holders and their representatives, policy makers, creative industries, and existing Europeana user communities.</p> <p>Specific goals</p> <ul style="list-style-type: none"> • Create a Communications Plan with a global approach, tools (communication kit) and strategies for engaging each target audience. • Ensure the dissemination of information about the project, its objectives, approaches and results (includes public seminars, conferences, project website, social media). • Create and support virtual communities to engage professional and end-user audiences. • Organise 'Sound' (re)discovery events in various countries in native languages (e.g. featuring star items) with the help of local Europeana partners in each country. • Organise two international public conferences to illustrate to all interested actors (both users and stakeholders) the guidelines and the recommendations produced by the Europeana Sounds network. • One hackathon will also be planned to explore new approaches by the creative industries.
7	Project management & sustainability	<p>Management of the whole project, according to agreed methods, structures and procedures as described in section B3.2c, including administrative management, reporting to the EC and performance monitoring.</p> <p>Provide leadership and guidance for the Best Practice Network (BPN) in the directions set out in this proposal, managing priorities and risks, ensuring quality of deliverables and evaluating the effectiveness of the BPN.</p>

WP	WP title	WP Objectives
		Develop an exploitation plan for sustaining the platform and services post-project. Specific goals <ul style="list-style-type: none"> • Efficient and effective management and decision-making procedures; • Successful delivery of the expected results within time, budget, resource and quality control constraints and according to performance indicators; • Compliance of project deliverables and reports with the Commission's requirements; • Efficient and effective communication and information sharing among partners; • Efficient financial management and timely payment procedures; • Define suitable business models for the BPN needed to sustain the platform and services after the project duration; • Project evaluation; • A set of specific progress reports on Europeana Sounds produced as part of good practice in project management.

1.5 Stakeholders and target audiences

The project brings together a number of different stakeholders and audiences. The table below is adapted from the DoW (B2.3, p. 39-40/122) [REF 1], and summarises the potential groups, their anticipated requirements, and the role they play in fulfilling the project's overall objectives listed above. More information on audiences is in D7.2 *Initial Communications Plan*, REF 4.

Table2: Stakeholders and audiences

Target group	Needs	Involvement and role	Project objectives
General public	Availability, range of content, relevance to personal interests	Key audience for Europeana, seeking to improve user engagement. Europeana channel, social media campaign, local 'sound' events, content highlights, focussed actions directed at mainstream press and broadcasters	2. Enrichment 4. Channels 6. Dissemination
Creative industries (specifically software developers, media outlets)	Availability, information on rights, access to the Europeana API, ease of use, and ways of addressing rights issues.	Promote use of the Europeana API. Targeted events including hackathons, case studies, cross fertilisation with Europeana Creative dissemination plans and project outputs. Europeana channel, local 'sound' events, content highlights. Demonstration of viability of commercial models for content available through Europeana	3. Access 6. Dissemination

Target group	Needs	Involvement and role	Project objectives
Educators (i.e. primary, secondary and tertiary teachers)	Engaging and relevant material to illustrate their lessons at their disposal	Newly identified target audience for Europeana. Could become regular users of Europeana features and database and promote Europeana to pupils/students, and at conferences	2. Enrichment 6. Dissemination
Researchers	Availability, range of content, scholarly value, names of participating collections	Link Europeana to academic infrastructures (Europeana Cloud project), Europeana V3 and Europeana DSI. Europeana channels, local 'sound' events, highlights of key content, project conferences. Demonstration of scholarly engagement with content, places high value on heritage content	1. Aggregation 2. Enrichment 4. Channels 6. Dissemination
Publishers (including audio, video, web and multimedia publishers)	New markets, interest in licensing / rights issues	Providers and possibly potential providers of valued data. Project website and channel, target key publishers, invite into working groups and/or project conferences	3. Access 6. Dissemination
Professionals / semi-professionals (musicians, broadcasters, etc.)	Engaging, high quality and available content at their disposal	Promote, broadcast, reuse the Europeana Sounds recordings (subject to licensing)	3. Access 6. Dissemination
Press and media	Clear information on project aims and content, reusable content for publication	Promotion to general public, other stakeholders. Project website and channel, inventories of key content, invite to project conferences	2. Enrichment 6. Dissemination
Funders	Value of their investment, audience reach, future potential	Sustainability for project overall or individual elements. Project website and channel, target key funders, invite to project conferences	3. Access 6. Dissemination

Target group	Needs	Involvement and role	Project objectives
Policymakers and politicians	Value for money, strategic planning, interest in licensing / rights issues	Key in providing support for cultural heritage and memory organisations in making data and new content available. Project website and channel, target key figures, invite to Europeana events	1. Aggregation 3. Access 6. Dissemination
Potential data providers	Highlight accessibility issues and promotion of their collections	Share their own content on Europeana via Europeana Sounds	1. Aggregation 3. Access 6. Dissemination

The needs of the various stakeholders and audiences will be monitored throughout the lifespan of the project as part of WP6. The User Advisory Panel for the project was set up to include members of target audiences.

2 EVALUATION METHODOLOGIES

Assessment methodologies will be reviewed with the User Advisory Panel in order to gauge their effectiveness during the course of the project. Additional methodologies may be considered should the need arise.

2.1 *Measuring impact*

In order to assess how successful the Europeana Sounds project has been at meeting its objectives, reaching target audiences and disseminating key messages, we need to determine the impact of our activities. While we can easily measure direct outcomes of the project, such as measuring the quantity of audio items aggregated and enriched, we also need to estimate impact: the longer-term, broader changes brought about by the project. By looking at the impact our work has had on our intended audiences, we can try to assess how useful the project has been, what we can improve on, as well as laying down lessons for other projects to build upon in the future.

This project will measure impact only during the term of the project. Longer term impacts will be apparent long after the project ends, not least because of the sustainability actions that are planned for implementing later in the project to ensure it has a lasting legacy beyond 2017. Longer term impact of this project will be measured indirectly in Europeana's continuous evaluation and impact assessments.

Measuring impact is important to evaluate the outputs and outcomes of a project. For Europeana Sounds, it is particularly important to measure how effective the project has been in achieving its aims regarding end users. An on-going evaluation process is crucial for improving the quality and effectiveness of our impact, and for making future recommendations. For example, we will aim to evaluate the impact of each project activity separately by:

- gathering a number of metrics relating to Key Performance Indicators;
- gathering web statistics;
- examining valuable feedback, gathered automatically and manually.

2.2 *The impact cycle*

To assess whether the strategies formulated to achieve the Europeana Sounds objectives are working well or need adjustment, it is important to evaluate impact using both quantitative and qualitative measures. How these are related and feed into performance evaluation and feedback is explained below.

Janusz and Qadir [REF 2] provide a model for project planning and adjustment according to stakeholder feedback, in a four-stage impact cycle:

Plan > Do > Assess > Review [...> Plan > Do...]

This highlights the importance of continual evaluation and adjustment to a project's activities.

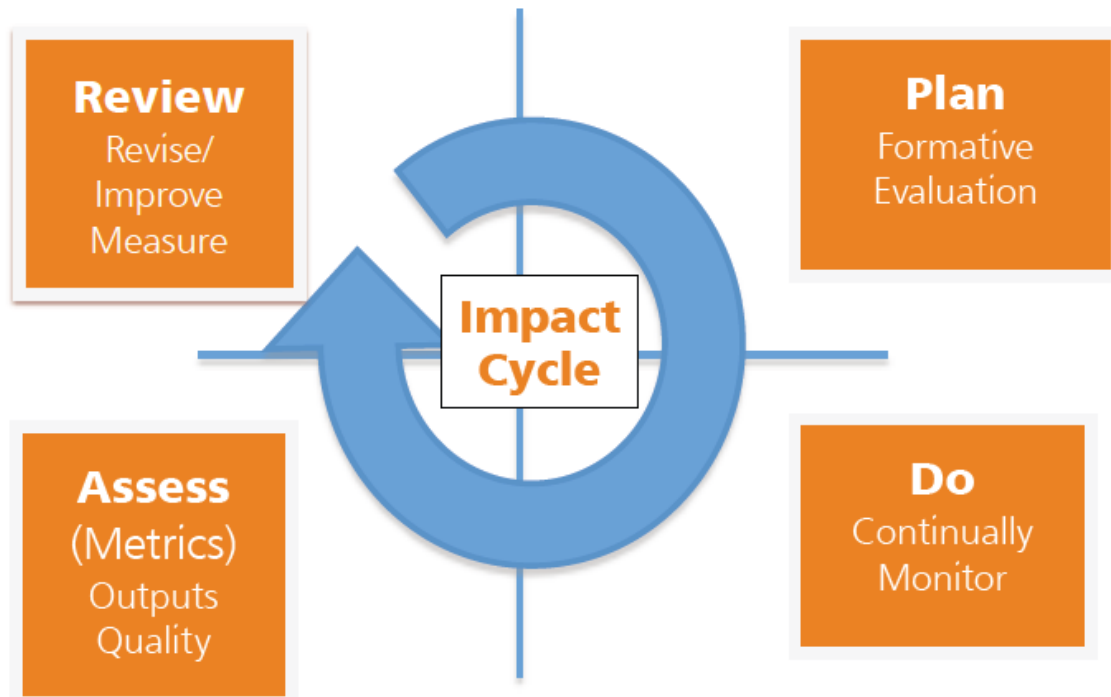


Figure 2: The impact cycle [Source: REF 2]

Different stakeholders in a project can benefit by continually improving impact strategies:

- For funders:
 - maximise impact of activities and investments
 - identify drivers for success
 - feedback into sustainability plan
 - attract more funding
- For project managers and Work Package leaders:
 - assess achievement of project aims
 - monitor quality of existing outputs
- Users, meanwhile, can:
 - discover any intended/unexpected benefits
 - provide feedback
 - improve the outputs
 - assess tools and provide recommendations

Quantitative methods alone do not reveal the quality, reach, impact or utility of the project activities and outcomes. In the case of user evaluation, for example, it is necessary to follow up with target audiences to assess how the data and content is being used – perhaps they have been cited, or provided some inspiration for a creative activity. For example:

- Has the project improved awareness/knowledge of audio and related items among Europeana’s users?
- Has the project changed the attitudes or perceptions of users?
- Has the project improved user satisfaction with the Europeana portal?
- Has the project helped users find and use audio objects through the Europeana portal?

Examples of how these can be assessed are given in the initial Implementation Plan (Section 4).

2.3 Reach and significance

Impact = Reach x Significance

Reach is a quantitative measure, whereas significance is qualitative. An evaluation toolkit should include methodologies for assessing and measuring both aspects [REF 2].

Quantitative (Reach)

- Deliverables/Milestones/KPIs
- Online surveys
- Social engagement
- Web metrics

Qualitative (Significance)

- Interviews (e-interviews/face to face)
- Focus groups
- Feedback from unsolicited emails from users
- Solicited emails
- Online surveys
- Ethnographic-observations
- Usability testing

Europeana Sounds needs to use the right suite of tools to assess whether it is achieving its goals, and to gather measures for reach and significance. Examples are given later in the next Sections.

2.4 User Advisory Panel and Advisory Board

The Europeana Sounds User Advisory Panel (UAP) consists of five external experts who together represent the target groups of the project: consumers, creative industries, publishers, researchers and memory institutions. This group was installed in M2 as part of Task 7.2 Quality assurance and risk management. Two members have been drafted from within the Consortium; three have been invited from external organisations. They will meet face to face once, as part of the project Plenary

meeting in February 2015, in time to reflect on the Europeana channels approach, T4.1.2. They will be consulted in other key phases of the project at quarterly telecom meetings, with the explicit request to judge whether the project delivers results relevant to the users represented by the user group. They will be asked to assess the development method adopted by the project. As part of the Quality Assurance procedure of the project, the Panel will be asked to review deliverables relevant to end-user services, notably WP2 and WP4 and will be able to comment on deliverables and milestones from other work packages.

The current members of the User Advisory Panel for Europeana Sounds are:

- Louis Jaubertie, BnF, France (digital library expert)
- Adrian Arthur, British Library, UK (web usability)
- Ashley Burgoyne, University of Amsterdam, The Netherlands (computational musicologist)
- Prof. Dr. Isabella van Elferen, Kingston University, UK (musicology and new media studies)
- Ben Fawkes, SoundCloud, Germany (creative industries)

In addition, the project has created an Advisory Board (AB). The Board members have been carefully selected for their specific expertise and for the networks they represent, including: digital music distribution, machine-led music information retrieval and search; crowdsourcing and public participation in online digital platforms. This Board will meet face to face twice and will be asked to give feedback from an external perspective on the project progress, exploitation trends and policy, and long-term sustainability. This feedback will be incorporated into the project continuous review and improvement process (see The Impact Cycle, Section 2.2).

The following are Advisory Board members:

- Prof. Mark Plumbley, Director, Centre for Digital Music and Professor of Machine Learning and Signal Processing, Queen Mary, University of London, UK
- Professor Martin Kürschner, composer and musicologist, Hochschule für Musik und Theater, Leipzig, Germany
- Amy Rudersdorf, Assistant Director for Content, Digital Public Library America, USA
- Dr. Alexandre Passant, Music Data Geeks, Ireland
- Prof. Dr. Eggo Müller, Professor of Media and Communication, Director of the School of Media and Culture Studies, Utrecht University; Manager of EUscreenXL project, Netherlands
- Ben Fawkes, Audio Manager, SoundCloud, Germany.
- Bettina Schasse de Araujo - Director of sync global and art-e-fait platforms, WOMEX, Germany.

2.5 Recommendations from the User Advisory Panel

The User Advisory Panel has met twice via teleconference during year 1 of the project, in May and October 2014. The first meeting included four panel members. The second meeting also included an

additional representative from SoundCloud.

Panel members are given access to some of the Deliverable documents as and when they are issued, via a dedicated User Advisory Panel project area on Basecamp. A dedicated mailing list has been set up on Basecamp to ensure efficient communications. Panel members also receive a bi-monthly internal project newsletter compiled by the BL so that they can keep up to date with project progress in between meetings.

Panel members were invited to review drafts of some of the project deliverable documents, including the following:

- D2.1 Crowdsourcing infrastructure and exchange policy
- D1.2 Rights labelling guidelines
- D1.3 Ontologies for sound
- D6.3 Initial communications plan
- D7.4 Evaluation report 1
- MS19 Audio channels first prototype

Their individual contributions are noted in the final versions on the separate Deliverable reports. Other documents that could be made available at a future date include the risks and issues log and an assessment of how risks were mitigated.

Panel members were invited to give feedback at these meetings on their recommendations for Europeana Sounds in the area of user evaluation. The UAP made the following recommendations, based on their areas of expertise:

- Need to measure the qualitative impact of the project as well as the quantitative statistics, KPI targets etc
- Evaluation of the channels work in WP4 will be carried out formally within the project anyway.
- Find a way to assess academic impact e.g. articles in peer-reviewed journals, teaching usage, conference presentations.
- It could be difficult to find relevant comparators for impact measurement.
- The project should indicate the impact that we would like to see the project achieve, as well as ways to measure it. What does success look like?
- Large scale research on data could be included, as well as a general data approach
- It could be a problem that there is a long time lag between the research taking place and its publication in peer reviewed journals when assessing impact with academic users
- It could be useful to measure usage of Europeana sound data and content in teaching materials and conference presentations, as these have a faster turnaround.

The next UAP meeting is a face-to-face meeting in February 2015 jointly with the Advisory Board at

the all-staff annual plenary meeting.

2.6 Quantitative Methods

In collaboration with the User Advisory Panel, a number of options for quantitative user evaluation methods have been proposed, based on the recommendations above:

- Request access to user data and user profiles from Europeana that already exist (with sensitivity towards confidentiality issues).
- Use similar methods for measuring impact to Europeana itself to allow comparison of results.
- Add a user survey to the website on usage of the existing 0.5 million sounds records, including an incentive to users to complete the survey
- Start by establishing a baseline using web stats for the sound data already in Europeana. What is clicked by whom at the moment?
- Use standard analytics, including a breakdown of users based on IP domains e.g. filter out the academic IPs.
- Comparison of absolute and relative values e.g. what percentage of those interested in sound are academics, and how does this compare with academic use across other media e.g. film, television
- Users could be asked to answer online questions as they download material.
- Review list-servs for academic publications citing Europeana data.
- Measure social media usage as well as academic use.

2.7 Qualitative methods

Establishing how and to what degree our activity has influenced a target audience is complex, so to understand this effect a variety of qualitative methods will be used during the evaluation period. Several methods will be explored to for user evaluation:

- Gather user feedback by interviewing Europeana Users from a variety of fields.
- One-to-one feedback sessions with participants at conferences and meetings.
- Query academics, educators and creative users on their usage of the data e.g. in lectures, presentations, exhibitions.
- Surveys of Europeana users.
- Gather unsolicited feedback (from the website and social media).

To assess broader impact, additional methods can be used. For example, the British Library has estimated cost savings for users when digital audio objects from its collections are made freely available online and reduce the need for users to travel to the Library to get physical access. Another method, used by Europeana for its business planning, follows a not-for-profit derivative of the *Business Model Canvas* (Osterwalder 2005) [REF 5] where revenues are replaced by benefits. We will follow this methodology, creating an estimate of exploitable outcomes from the project. This will be

expanded and elaborated on in the scope of D7.5: *Market Survey and Exploitation*. Similarly, Europeana's *Impact Assessment Task Force* built on the methodologies of Osterwalder's *Business Model Canvas* and on the *Balanced Value Impact Model* by Simon Tanner [REF 6]. Its *Europeana Strategy 2015-2020 Impact report* (dated 28 May 2014), focusses on what impact means for Europeana as a Digital Service, and what success means for Europeana and as a core infrastructure.

In Europeana's Impact report, impact is considered in terms of the positive impact on stakeholders. The key question to be asked is – have we made a difference? In this model, impact is assessed through three perspectives which provide a methodology enabling the assessment of core activities:

- 1 **Social and Cultural Impact:** through the demonstration of benefits to identified communities as well as the positive influence achieved
- 2 **Economic Impact:** through the demonstration of both value and economic benefits to stakeholders
- 3 **Impact on Network and Innovation:** through the demonstration of positive benefits from opportunities and standards developed

The Europeana Impact Assessment Framework has been developed and is used as an evaluation tool. A similar process can be used in this project, albeit on a more modest scale and over a short timeframe. The framework provides measurement of impact through indicators for each perspective. Activities are assessed in terms of their outputs which are measurable (against SMART objectives) and outcomes are clearly identified. Examples are given in the Impact report.

2.8 Performance Indicators

Key Performance Indicators (KPIs) provide for each of the Europeana Sounds Work Packages various quantitative metrics of project progress on an annual basis. These are reported formally to the Commission at each Annual Review, and are summarised below. [source: REF 1].

Table3: Key Performance Indicators

KPI	Relating to objective / result	Indicator name	Target Y1	Target Y2	Target Y3
1	Aggregation (WP1)	Number of audio items aggregated	50,000	250,000	500,000
2	Aggregation (WP1)	Number of other items aggregated	30,000	90,000	225,000
3	Aggregation (WP1)	Number of items freely available for re-use	10,000	40,000	90,000
4	Aggregation (WP1)	Number of data providers using new EDM profile	50%	100%	100%
5	Aggregation (WP1, WP5)	Number of Consortium partners to have made use of training	33%	66%	100%

KPI	Relating to objective / result	Indicator name	Target Y1	Target Y2	Target Y3
		resources			
6	User engagement (WP4)	User satisfaction. Channels will be evaluated annually in a user survey where the KPI is that 70% of users rate the channels as good or excellent	NA	70%	70%
7	Technical platform (WP5)	Number of services developed and implemented in the Europeana infrastructure	3 Registration, Mapping, Publication	3 Cleaning, Normalisation and channels	2 Quality checking and Resource discovery
8	Enrichment (WP2)	Number of metadata records enriched through semantic enrichment	10,000	500,000	2,000,000
9	Enrichment (WP2)	Number of annotations (tags) added by users	0	200,000	1,500,000
10	Enrichment (WP2)	Number of new connections among records established by users & automatically	0	5,000	10,000
11	Enrichment (WP2)	Number of participants in the GLAMwiki edit-a-thons	50	150	300
12	Music information retrieval (WP2)	Number of items accessible through the music retrieval service	0	15,000	25,000
13	Dissemination (WP6)	Participation of programmers in the hackathon (M24)		40	
14	Dissemination (WP6)	Publications about the project (including external blogs)	200	500	800
15	Dissemination (WP6)	Number of events where the project is presented	10	20	40
16	Policy (WP3)	Number of publishers added to Europeana Network and engaged in stakeholder dialogue	3	5	5

2.9 Europeana portal web analytics

Europeana Sounds will double the amount of audio on Europeana – and make it far more discoverable. An important measure of impact therefore is web traffic to the Europeana portal, in particular traffic for audio and audio-related items.

The Europeana web team gather essential web traffic metrics and can provide customised reports on content and on access, although at present traffic cannot be measured according to data type such as audio. Since November 2014, an analytics microsite, the Europeana Statistics Dashboard, has been made publicly accessible, giving summary statistics of use. The system is currently in an alpha stage of release². Once fully deployed, it will produce a set of dynamic reports that highlight the following metrics for the data provided by each data provider:

- Number of objects in Europeana
- Item types
- Open for re-use (by year + quarter)
- Views / Click-throughs (by year + quarter)
- Top 10 digital objects (by year + quarter)

Sample metrics are shown in the following figures:

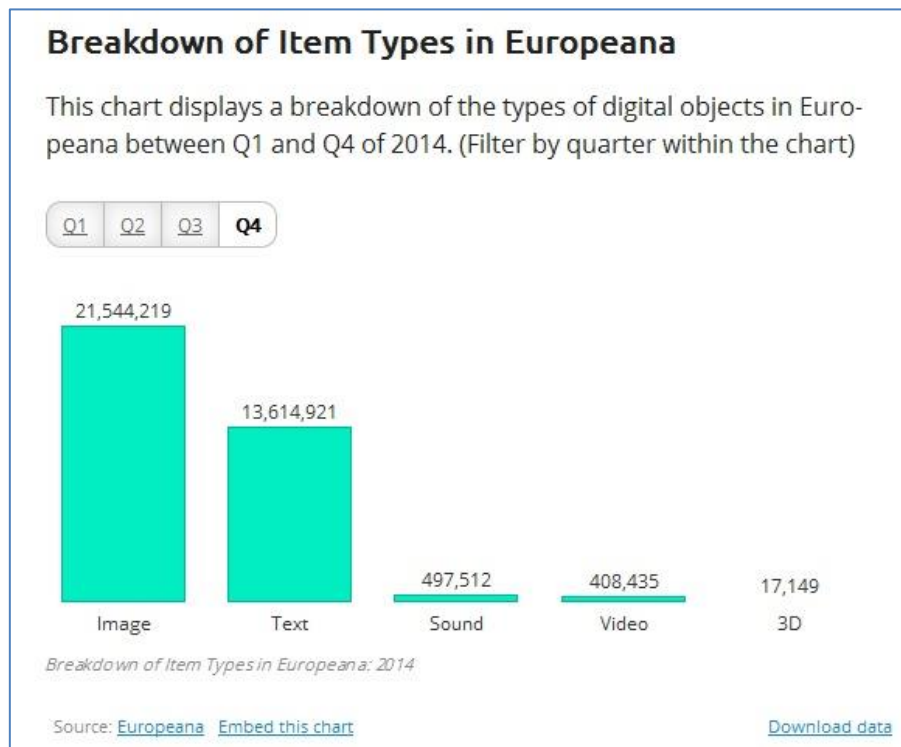


Figure 3: Total objects in Europeana for all data providers, by item type, as at Q4 2014, on the Europeana statistics dashboard.

² <http://statistics.europeana.eu>

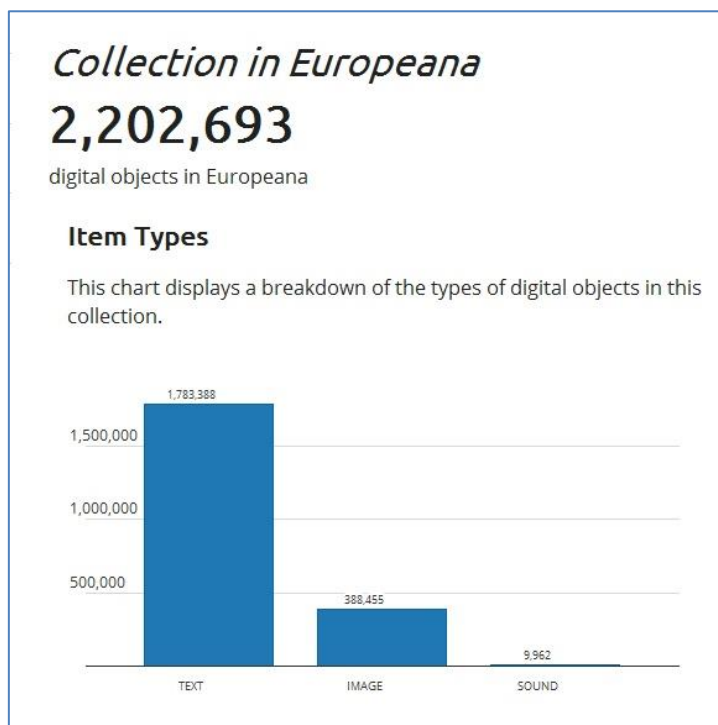


Figure 4: Objects (texts, images, sounds) in Europeana provided by Europeana Sounds partner BNF, by item type, at Q4 2014.

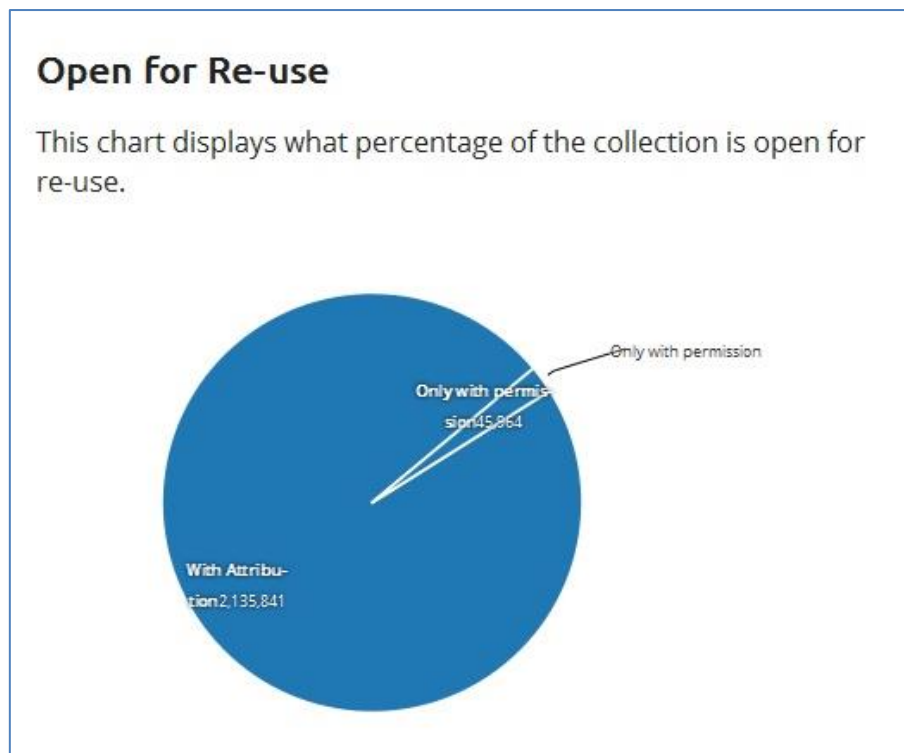


Figure 6: Re-usable objects in Europeana provided by European Sounds partner BNF, as at Q4 2014.

Views & Click-Throughs

This chart displays the views of the collection on the Europeana.eu website together with the number of times a user clicked through to the website of the data provider. Click-throughs are not measured prior to April 2012. (Filter chart by year above)

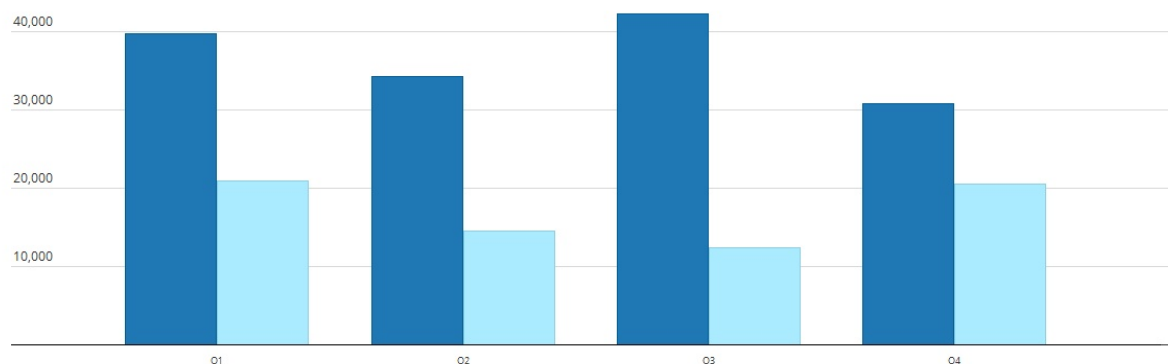


Figure 6: Hits and click-throughs on Europeana for Europeana Sounds partner BNF during 2014.

The information will be available at data-provider level to measure impact for each data provider. This will provide a way for data providers to assess ‘before and after’ trends in use, following aggregation and publication of new audio and audio-related metadata records. Assessing the impact of audio-related items directly will not be possible in all cases as these do not constitute a measurable data type. However data providers may be able to tally their known data contributions to web statistics and estimate traffic indirectly.

European Sounds aims to track web traffic (visits, click-throughs, top items) over Y2 and Y3 for several data providers. The planned development for the statistics dashboard will provide one way to evaluate the project, and will also give useful feedback to each data provider on the size of their collection in Europeana, its composition, how well it performs on the Europeana platform and to what extent making their collection available via Europeana has increased the reach of their collection outside of their own websites. [REF 7]

2.10 External assessment

In Year 3 of the project we shall contract an external assessor to undertake an independent evaluation. This will provide an external view of progress and impact and results will be fed into the final Annual Report for the project. The review is expected to take place from M30, and will include assessments of specific objectives, specific impacts, e.g. licensing guidelines on aggregation; and overall impact including user perspectives, project performance, and sustainability.

3 IMPLEMENTATION PLAN FOR EVALUATION

A preliminary plan for implementation is given below. This will be finalised after M12 once the criteria and methodologies have been assessed in consultation with the User Advisory Panel and Advisory Board.

3.1 Evaluation across Work Packages

In WP7, Task 7.5 includes in Y2-Y3 of the project a co-ordinating role for the evaluation elements of WPs 2, 4, 5 and 6. The table below [source: REF 1] summarises these elements:

Table 4: Evaluations carried out as tasks in WP1-6

WP	Task and evaluation activities	Task schedule	WP reports
WP2	T2.1.2: Crowdsourcing: operationalisation and evaluation.	M13-M36	D2.4) Crowdsourcing infrastructure V1 Assessment and Recommendations: Documents results of first trials with all content providers [month 17] D2.7) Crowdsourcing evaluation and impact assessment: Assessment of quality and usefulness of the user contributions [month 30]
WP2	T2.2: Semantic enrichment	M4-M36	D2.9) Evaluation report on implementation of semantic enrichment: Technical report with the application scenario, the implementation of Semantic Web technologies in the Europeana context [month 36]
WP2	T2.4.1. Linking music to scores pilot.	M2-M13	D2.3) Linking Pilot delivery report (software, documentation): Technical report outlining the execution of the pilot [month 14]
WP2	T2.4.2 Music information retrieval pilot	M14-M21	D2.6) Music Information Retrieval Pilot delivery report: Technical report outlining the execution of the pilot [month 22]
WP4	T4.1.2: User experience designs, user testing and expert review	M4-M36	From M18 the main development ends and the Europeana channels and Spotify Application become subject to Europeana's continuous user evaluation process. Information on the development, user surveys and usability testing work undertaken in the WP4 tasks will be provided as input on progress in the contractual annual reports, and in the interim progress reports from WP7 (in M7, M19 and M31). Also D4.1) Audio channels production version: Technical report, including findings and assessment of expert review and assessment of the End User Panel [month 34]

WP	Task and evaluation activities	Task schedule	WP reports
WP5	T5.2 Aggregation infrastructure evaluation.	M9-M11	D5.1) Report on the evaluation of the aggregation mechanism: Report with recommendations on evaluation of aggregation toolset (ready at the end of first year) and pilot phase for content provider familiarisation with the technology [month 14]
WP5	T5.3 Aggregator deployment and maintenance	M13-M36	D5.5) Final report on aggregation toolset: Covering results of evaluation process, with suggestions for new functionality needed to be developed to improve toolset efficiency and usability [month 36]
WP6	T6.1: Communication Plan	M1-M36	D6.4, D6.5, D6.6), Communication plan and evaluation V1: The Communication Plan will include types of dissemination activities, types of dissemination materials, target audiences, disclosure level of information, frequency of outputs. The deliverable will include an evaluation of the year's activity (and changes to the plan for the year ahead in the case of the first two iterations). [month 13, 25, 36]

3.2 Initial project Evaluation Plan

An implementation plan and methodology will be developed from M12 for Y2 and Y3 of the project, reviewing the evaluation activities on WPs 2,4 5 and 6 (summarised above) together with additional quantitative and qualitative measures in consultation with the User Advisory Panel. Targets will be set for all measures and the results reported on and assessed in the next Evaluation Plan D7.4, due in M31.

The planned approach we will follow is a benefits realisation process, which allows regular monitoring and evaluation of achievements against project objectives, which together allow a high-level overview of project impact. Our approach ensures a clear focus on key benefits that have a strategic impact, and which are feasible to measure. Key benefits will be identified in consultation with the User Advisory Panel as indicators of whether the programme has successfully delivered its objectives. They will be revisited regularly throughout the life of the project as part of the activities in WP7.

The first stage is to establish criteria against which an initial list of benefits can be mapped. These might be:

- does a benefit link to the project objectives?
- is the measurement of benefit realistic?
- is the benefit useful to be measured?

Those benefits most closely aligned to the criteria will become the key benefits - they will connect directly to project objectives and have a direct input to the overall project impact. They will include some of those linked with the KPIs, although no more than 6-8 key benefits will be used, as any more can create a burden on resource.

Each key benefit will then be further analysed and a 'Benefits Profile' will be produced for each key benefit. This will:

- describe the benefit
- agree a measurable target and the method of measuring
- agree a timescale for its achievement
- agree owners
- establish a baseline and a method for tracking progress

Table5: Initial list of evaluation criteria, measures and methods for assessment

Key benefit	Stakeholders impacted	Measure	Methodology
Audio material is better represented	Data providers	Improved aggregation toolkit	web survey / expert interview
	Data providers	Number of items aggregated (KP1,2)	aggregator metrics
	Data providers	Effectiveness of rights guidelines	web survey / expert interview
	General public, creatives, researchers, educators	% audio on portal	web stats
	General public, creative sector, educators	Number of audio items unlocked	aggregator metrics
Objects fully described	Data providers	Use of EDM SP (KPI4)	web survey, expert interview
	General public, professionals, educators	% items with rights labels	aggregator metrics
	General public	No. of user tags (KPI9)	crowdsourcing platform metrics
	Data providers	Semantic enrichment (KPI8)	aggregator metrics
	General public, professionals, educators	Pilot enrichments and linking	aggregator and crowdsourcing platforms
	General public, professionals, educators	GLAM wiki edit-a-thons	Participant numbers

Key benefit	Stakeholders impacted	Measure	Methodology
Improved search, usability, visual design, accessibility	General public, creatives, researchers, educators	Web hits	Web stats
	General public, creatives, researchers, educators	Satisfaction with new channels	web survey
	General public, creatives, researchers, educators	Third party platforms (SoundCloud, Spotify etc)	Number of platforms
	General public, creatives, researchers, educators	Social media presence	analytics
	General public, publishers, media, creatives, researchers, educators	No of items for re-use (KPI3)	aggregator metrics
Impact and sustainability of the Best Practice Network	Data providers, funders, policymakers	Estimate of economic and exploitable impact of project outcomes	Business Model Canvas planning
	Data providers, funders, policymakers	Establishment of formal IASA involvement	Periodic reports
	Potential data providers	No of additional providers in BPN	Participant numbers
	General public, creatives, researchers, educators	Number of publications (KPI14)	WP6 online survey
	General public, creatives, researchers, educators	Number of events (KPI15)	WP6 online survey

Baseline measures and Y1, Y2 and Y3 Targets and owners of each measure will be added after M12 to the schema. Possible examples for one profile are given below.

Table 6: Example of a benefit profile

Key benefit	Stakeholder impacted	Measure	Owner	Method	Target	Baseline	Y2	Y3
Audio material is better represented	Data providers	Satisfaction with aggregation toolkit	WP5	Web survey (T5.2)	X%	n/a	N%	N%
	Data providers	Items aggregated	WP1	KP1, 2	725k	0	340k	725k

4 COMMUNICATION OF THE EVALUATION PLAN

The Evaluation Plan and assessment criteria will be communicated to project partners, so that they appreciate the part their activities have to play in achieving the expected outcomes outlined in Section 3.

Table 7: Role of work packages

Project objective	Impact area	Barrier to solve	WPs
1. Aggregation	Audio material is under-represented	1. Key collection holders see the business benefit of contributing further material 2. Non-compliance of catalogue records with European standards	WP1
2. Enrichment	Not all objects are fully described	3. Linking to and working with existing communities 4. Defining user communities 5. Designing for success e.g. engaging micro tasks	WP2, WP4
3. Access	Audio material is under-represented	6. Failure to secure access and re-use rights	WP3
	Improve search, usability, visual design and accessibility	7. Difficulties on agreeing cross-border rights 8. Need for re-use and sampling, linking to policy	WP3
4. Channels	Audio material is under-represented	9. Key collection holders see the business benefit of contributing further material	WP4
	Improve search, usability, visual design and accessibility	10. Enhance search facility, visual design and usability in response to sub-contracted user experience research	WP4
5. Infrastructure	Audio material is under-represented	11. Enhancements to the infrastructure to support aggregation in sufficient numbers 12. Enable Europeana Sounds as the fifth aggregator for Europeana	WP1, WP5

Project objective	Impact area	Barrier to solve	WPs
	Not all objects are fully described	13. Setting up an infrastructure that enables crowdsourcing to happen in online environments 14. Tools for feature extraction and semantic enrichment are less mature, work with organisations with new skill sets 15. Work on linking data proceeds in parallel with other enrichment activities	WP2, WP5
6. Dissemination and networking	Not all objects are fully described	16. Stimulating user participation through networks e.g. Europeana Network	WP6, WP7
	Improve search, usability, visual design and accessibility	17. Establishing relationships with key business partners e.g. Spotify, SoundCloud	WP4, WP7

5 SUMMARY

This document marks the start of overall project evaluation activities in T7.5. It begins by summarising the project objectives and outcomes, then examines different ways to measure impact. It outlines a proposed strategy and an implementation plan for the criteria we will refine then evaluate during the second and third year of the project, and quantitative and qualitative methodologies for the evaluation. Evaluation should play a significant role in the project and the evaluation criteria used should fit comfortably alongside the project objectives. The evaluation criteria should be made known to the project members at an early point in the evaluation cycle. This is the first of two Evaluation Reports. A second report, D 7.7, will be issued in M31.

6 REFERENCES

REF 1	Europeana Sounds project "Description of Work". http://pro.europeana.eu/documents/2011409/8d0e9833-4608-494e-af77-681e68f8a8c8
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REF 4	Europeana Sounds-D6.3-Initial-Communication-Plan. Available at: http://pro.europeana.eu/web/europeana-sounds/documents/
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REF 6	Tanner, S. (2012) <i>Measuring the Impact of Digital Resources: The Balanced Value Impact Model</i> . King's College London, October 2012. Available at: www.kdcs.kcl.ac.uk/innovation/impact.html
REF 7	Public Beta: Europeana Metrics Dashboard. 2014 Draft edited by: Neil Bates, Mirko Lorenz, Ritvvi Parikh.