The following are details concerning the work plan provided in the project narrative. These details elaborate and specify all individual work tasks, milestones, project phases, etc. All listings of duration are in *working days* (not counting weekends or typical holidays).

1. Preparation/Startup Phase (67 days, Sat 10/1/11 - Sat 12/31/1): This startup phase will include initial preparatory activities, and will allow some initial time to set up administrative processes, including grant expenditure tracking accounts. If IMLS is delayed in contacting us with relevant award information on the project, this will also provide some contingency time. Matt Schultz will work as full-time project manager under the supervision of the Co-PIs during this period, and focus on getting the project off to a fast start.

    1.1. Project Startup Activities and Hiring (20 days, Mon 10/3/11 - Fri 10/28/1): There will not be a recruiting period needed for this project, as the relevant candidates for project work are already known. In the case of Educopia/MetaArchive, the hire will be Matt Schultz as detailed in the narrative. In the case of UNT, one of the available programmers in the current digital projects team will be allocated to the project, and his or her salary source information in the campus HR system will be edited to initiate the individual working on the project. The websites for the project will be initially set up during this period by Shannon Stark, who will develop them with Schultz during coming months.

    1.2. Steering Committee convenes (15 days, Mon 10/17/11 - Fri 11/4/11): Katherine Skinner will contact the members of the steering committee as soon as the awrd information is received, and the first conference calls of the group will take place during this period. A regular conference call schedule will be planned, and a closed listserv will be set up for communication purposes.

    1.3. Functional Requirements for Micro-Services Developed (35 days, Mon 10/17/11 - Fri 12/2/11): Schultz will work with the Co-PIs, members of the steering committee, and the programmer to develop the functional requirements for the micro-services during this period. The programmer will begin work immediately on testing of tools to be integrated in the micro-services. The UNT digital projects team has already been experimenting with micro-services for integration of external open source tools during 2010, and this activity will not require a lengthy ramp up time.

    1.4. Planning for SC Meeting (20 days, Mon 11/7/11 - Fri 12/2/11): The first steering committee (SC) meeting will be held in February 2012, and we will immediately begin preparations for it. Our hope is to convene this meeting in conjunction with the 2012 TxETDA conference, which UNT has put in a bid to host. If UNT is not the host institution, we should still be able to coordinate holding the meeting in conjunction with the conference wherever it is held in Texas. Some of the attractions of holding the SC meeting in conjunction with the conference are that it will enable the project to begin building bridges with prospective users of the documents and tools that the project will develop.

2. Development/Deployment Phase (265 days, Mon 12/5/11 - Fri 12/7/12): This project phase is focused on the development of initial versions of all project deliverables, including documents and software. Matt Schultz will continue to work as project manager reporting to the Co-PIs during this period, and will orchestrate the close work of the steering committee and the programming team.

    2.1. Initial drafts of project documents (55 days, Mon 12/5/11 - Fri 2/17/12): The steering committee will begin to hold weekly conference calls, bring bibliographies up to date and complete other research updating for all guidance documents. Outlines and early drafts of all project documents will be prepared, reviewed, and discussed at the first full steering committee meeting in February 2012.

    2.2. Micro-services alpha development (54 days, Mon 12/5/11 - Fri 2/17/12): The programming team will create the micro-services iteratively using the scrum development methodology. This project builds on previous development work with micro-services that UNT is currently engaged in with the Library of Congress, CDL, PSU, and other institutions. We do not anticipate any difficulty in developing

alpha level versions of these services within this two month period. Such alpha level tools will not be fully functional, but enough detail will be available concerning these tools by this point that useful discussions concerning the tools can be conducted at the meeting. If public demonstrations are relevant, we can also do live demonstrations of the tools.

2.3. Steering Committee meets (2 days, Mon 2/20/12 - Tue 2/21/12): The steering committee will come together in person to discuss the project documents and software development. This meeting will allow close collaborative work on different parts of the project, including early discussions of how the guidance documents will be integrated into the workshop educational materials. If we are able to hold the meeting at the TxETDA Annual Conference as planned, we will also have opportunity to network with other ETD programs, get early feedback from other ETD programs, and develop relationships with prospective test sites. The outcomes of this meeting will inform the next six months of intensive project work to further develop the project documents and tools.

2.4. Full drafts of project documents developed (125 days, Mon 2/27/12 - Fri 8/17/12): This will be the single most intensive period of project work for the steering committee, which will undertake a concerted push to get the project guidance documents and educational materials into complete form, albeit with the intent to further revise them subsequently. We will identify issues during this period that may require significant or difficult decisions if they arise, and plan to make these decisions at the second steering committee meeting.

2.5. Micro-services beta development (125 days, Mon 2/27/12 - Fri 8/17/12): In parallel with the development of the project documents, work will proceed on the micro-services. We will plan on preparing beta releases of all the micro-services in time for the second project SC meeting. These beta releases will provide at least basic functionality for all the requirements set forth for the micro-services, although some advanced features may not be present by the end of this period. Documentation on the micro-services will be drafted, but not yet complete.

2.6. Second Steering Committee Meeting (2 days, Mon 8/20/12 - Tue 8/21/12): This meeting, held at approximately the half-way mark of the project, will be a key milestone in which all project deliverables will recognizably take form. Planning will also take place at this meeting for the project workshop, to be held the following February in 2013. Based on decisions made at this meeting, the first public-release form of the project documents and micro-services will be developed by December 2012. We do not plan to hold this meeting in conjunction with another ETD conference primarily because there does not appear to be any appropriate ETD conference near this date. Instead, the meeting will simply be held at UNT to best manage costs.

2.7. Deployment of drafts and beta software (75 days, Mon 8/27/12 - Fri 12/7/12): Following the second steering committee meeting, the project documents and micro-services will be deployed for evaluation and testing at the seven partner sites, as well as any other test sites that have come forward through contacts at the first steering committee meeting or other contacts. Partner/test sites will take careful notes through this three month period about deficiencies in the documents and software. Schultz will coordinate the evaluation and testing process, collate notes, and synthesize this information into a report as one of the final project activities he completes before leaving the project. Management of the day-to-day project activities will transition in the next phase to the Co-PIs, as the project work turns to dissemination and assessment goals.

3. Dissemination/Assessment Phase (215 days, Mon 10/1/12 - Sun 7/28/13): This project phase will focus on disseminating and reefing the documents and software produced by the project, and assessing the project outcomes.

3.1. Propose submissions for upcoming conferences (59 days, Mon 10/1/12 - Fri 12/21/12): Dissemination of the project documents and tools is a key goal of this proposal. Members of the steering committee will propose papers and presentations at upcoming conferences in order to disseminate project results as widely as possible. Some of the prime candidates for presentations are listed below.

3.2. Planning for Workshop & SC Meeting   (100 days, Mon 10/1/12 - Fri 2/15/13): As we come closer to the project workshop in February the steering committee will make preparations for the event. The venue will be scheduled, invitations and announcements will be distributed via listservs and other means, and the workshop educational materials will be printed. Steering committee members will refine the schedule for the workshop and review their respective instruction duties.

3.3. CNI Fall 2012 Meeting (2 days, Mon 12/10/12   - Tue 12/11/12): The Fall CNI task force meeting is one of several possible presentation opportunities, and good opportunity for formal announcement of the project documents and tools to senior library and academic leaders. In the case of CNI, there is the possibility of hosting a pre- or post- conference to build relationships with senior leaders of relevant institutions that might be potential evaluation and test sites. We will follow up on all contacts made at this and other events.

3.4. Micro-services refinement and assessment (163 days, Wed 12/12/12 - Fri 7/26/13): During the first six months that project documents are made publicly available, individual email addresses will be required to receive micro-services (after this period the software will be made available for anonymous download). Follow-up contacts will be made with individuals who receive documents after one month to assess basic questions concerning the knowledge and skills conveyed by the documents. Individual names will not be recorded during these assessment activities, and only aggregate (rather than individual) scores will be reported to IMLS in project interim report narratives.

3.5. Documents refinement and assessment   (163 days, Wed 12/12/12 - Fri 7/26/13): During the first six months that project documents are made publicly available, individual email addresses will be required to receive documents (after this period the documents will be made available for anonymous download). Follow-up contacts will be made with individuals who receive documents after one month to assess basic questions concerning the knowledge and skills conveyed by the documents. Individual names will not be recorded during these assessment activities, and only aggregate (rather than individual) scores will be reported to IMLS in project interim report narratives.

3.6. Steering Committee Meeting and Workshop @ TxETDA Annual Conference (2 days, Mon 2/18/13 - Tue 2/19/13): The final meeting of the steering committee and the project workshop will be timed to coincide, and (if possible) will also be timed to coincide with the 2013 TxETDA conference, again as a way to reach relevant users of the project results in the regional Southwest. Learning outcomes for all workshop attendees will be assessed. Contacts with workshop attendees will be followed up with subsequent contacts by the steering committee to garner feedback concerning the documents and tools.

3.7. CNI Spring 2013 Meeting (2 days, Mon 4/8/13 - Tue 4/9/13): The Spring CNI meeting will be another opportunity for presentations and dialogue following the project workshop.

3.8. ACRL 16th National Conference (4 days, Wed 4/10/13 - Sat 4/13/13): The Association of College and Research Libraries is another example of an appropriate conference presentation opportunity. The 2013 ACRL will be held in Indianapolis, which is relatively close to one of our project partner sites (ISU), and is therefore a logical venue for a pre-conference on a subset of the curriculum developed for the project workshop.

3.9. USETDA Conference (2 days, Mon 5/20/13 – Tue 5/21/13): The US ETD Association meeting will be held circa May 2013, and will be an excellent opportunity for presenting project results and building relationships with prospective users. This event might also be an opportunity for a pre-conference on a subset of the curriculum developed for the project workshop.

3.10. ETD 2013 (2 days, Mon 6/10/13 - Tue 6/11/13): The international ETD 2013 conference may be held in the United States in 2013 (a venue has not yet been set at the time of this writing); if so, it would be a prime opportunity to make presentations on project results and to host a pre-conference on a subset of the curriculum developed for the project workshop.

4. Reporting/Completion Phase (66 days, Mon 7/1/13 - Mon 9/30/13): This phase will focus on finalizing all deliverables, writing up final project reports, and transitioning the project deliverables to maintenance organizations.

   4.1. Final revisions to documents and code (59 days, Mon 7/1/13 - Fri 9/20/13): During the final months of the project the focus will be on finalizing all project documents and tools; however, if urgent and important modifications are needed in this period, we will make them. All documents and code will be reposited in multiple locations, as per the digital product data management plan submitted with this proposal.

   4.2. Final Reporting to IMLS (20 days, Sun 9/1/13 - Thu 9/26/13): Final project reports, including assessment and project results findings, will be written up and submitted to IMLS by the Co-PIs and steering committee.