

Shared Workspace

Statement of Operating Principles

July 2004

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Glossary

Agency is a synonym for 'organisational unit' in this document. It gets used as a blanket term for business units, departments, Crown entities, Offices of Parliament or the Reserve Bank.

A **Collaboration Leader** is the agency group that has requested a secure space for sharing information in the Shared Workspace. They invite others to use that space as they need to. they take responsibility for the information being shared and who has access to that information.

components (generally not capitalised) refers to tool that is offered by shared workspace, E-government Unit, or agencies for producing online services.

e-government initiative is a project or activity that involves the use of ICT to:

- interface to the public
- support the delivery of services or information
- automate 'back office' systems, applications, and information resources that make up the agency's business.

EGU is the Acronym for the E-Government Unit: at this time it is a business unit of the NZ State Services Commission.

E-Library: a tool planned to be included with the Government Intranet. It will be a searchable digital repository of State sector documents (such as research) of ongoing value. It will tend to be for work that is not in public domain.

Funders: Those who prioritise and/or allocate Shared Workspace funding (Governing Body, SSC, Treasury, Minister for State Services)

The **Governing Body** refers to the proposed management group for the Shared Workspace Programme. In this context it means a multi-agency management model or 'club' approach to governance.

The **Programme Managers:** The specific group of staff in EGU that manage Shared Workspace programme on a day-to-day basis. SSC has ongoing funding to coordinate and run the Shared Workspace Programme in the E-Government Unit.

Protocols: a written agreement between Shared Workspace and each client group about conditions of use and responsibilities for all parties. It covers generic conditions of use for all user groups plus specific ground rules a group agrees is important to them.

Shared Workspace (capitalised) refers to the project and overall product that is being designed for cross agency collaboration

tools (generally not capitalised) refers to the software products offered for users in Shared Workspace.

S.E.E. is the acronym for Secure Electronic Environment – the main offering is the standards and services that make up SEE Mail.

SSC is the acronym for the State Services Commission of New Zealand.

workspaces (not capitalised) refers to the online spaces set up for groups and teams within Shared Workspace

1. Introduction

1.1 Why has this document been prepared?

Shared Workspace is an all-of-government resource and a shared asset. This Statement of Operating Principles contains the high-level principles to be used as a guide for developing and operating this shared asset over time.

1.2 Who should read this document?

You should become familiar with this document if you

- manage or develop Shared Workspace tools
- contribute information resources to Shared Workspace
- actively govern or promote the Shared Workspace.

1.3 Shared Workspace Purposes

The purposes of the Shared Workspace are

- implement a shared set of tools and services for secure online collaboration, for diverse teams/communities in government and their business partners.
- offer technical support for those working across agency boundaries;
- facilitate better understanding and use of online collaboration¹
- help agencies to share their highest value documents and data²
- foster a culture of collaboration

¹ Applies to the team/groupware tools offered by Shared Workspace

² Applies to the secure Government Intranet

2. Shared Workspace Strategic Fit

2.1 Fit with E-government Strategy³

An activity is aligned with the E-government Strategy if its scope is aligned with

- definition of an e-government initiative
- e-government strategic outcomes, specifically
- convenience and satisfaction
- integration and efficiency
- participation
- e-government mission, specifically:
 - By June 2004 the Internet will be the dominant means of enabling ready **access** to government information, services and processes.
 - By June 2007, networks and Internet technologies will be integral to the **delivery** of government information, services and processes.
 - By June 2010, the operation of government will have been **transformed** through its use of the Internet.

2.2 Shared Workspace is an e-government initiative

An e-government initiative is defined as a project or activity that involves the use of ICT to:

- interface to the public
- support the delivery of services or information
- automate 'back office' systems, applications, and information resources that make up the agency's business.

Note that Shared Workspace is an e-government initiative that can form part of back office systems (when used for collaboration) and also deliver information (when used as an Intranet).

2.3 Alignment with Strategic Outcomes

Shared Workspace contributes primarily to the strategic outcome of *integration and efficiency* (information and services will be integrated, packaged and presented to minimise cost and improve results for people, business and providers).⁴ In addition, Shared Workspace can be used to support *participation* goals set by the EGU.

³ E-Government Strategy 2003

⁴ Background: the project is aligned with other all-of-government capacity building strategies that started at this time. It acknowledges agency concerns that multiple tools to collaborate between multiple agencies was going to add up to fragmentation. It acknowledged concerns for many agencies, particularly smaller agencies, about the inefficiency of owning collaboration tools when they preferred to access these tools only as required. However, while the private sector could clearly meet this as-required need, from the all-of-government perspective this was already leading to long term fragmentation of Crown information across multiple privately owned systems, some based offshore.

In integration terms, Shared Workspace aims to:

- deliver secure internal collaboration and wider consultation sought by Ministers.
- deliver a unified view of online cross-agency projects and networking activity online,
- deliver ways to coordinate cross-agency projects online
- help people new to collaboration systems get started on the right track
- reduce the risk of misusing collaboration technologies in the public sector environment.

In efficiency terms Shared Workspace aims to

- deliver common collaboration infrastructure
- help agencies avoid costs of duplicated collaboration infrastructure
- enable staff to easily share and find information in a secure environment.
- promote sharing of existing information held in agencies.
- help reduce duplication of future documentation and research.

In participation terms Shared Workspace aims to

- help people inside and outside government work together on policy or service development
- model an online service that is adaptable, user-focused and results-oriented.

2.4 Alignment with e-government mission

Shared Workspace is contributing to the first goal of the e-government strategy (by June 2004 the Internet will be the dominant means of enabling ready **access** to government information, services and processes).

2.5 Fit with Public Service Practice and Conventions and Standards

Shared Workspace will comply with relevant public service standards of conduct and management. At this time these are considered to be

- Policy Framework for Government Held Information (refer to online copy at <http://www.ssc.govt.nz/policy-govt-info>)
- Public Service Code of Conduct (refer to online copy at <http://www.ssc.govt.nz/coc>)
- the convention of a politically neutral public service, including officials' obligation to offer frank and balanced advice to the government of the day and without bias toward one political party or another. (refer to online resources at <http://www.ssc.govt.nz/political-neutrality>)

The Shared Workspace will work to NZ government technology and security standards.

- NZ e-Government Interoperability Framework (e-GIF)
- Security in Government Departments (SIGD).

2.6 Fit with Legislative Context

The Shared Workspace will comply with relevant legislation that specifically affects the Government and public service. At this time these are considered to be

- Official Information Act 1982 including provisions relating to transfer of requests
- Privacy Act 1993
- Archives Act 1957
- The Copyright Act 1994
- The State Sector Act 1988
- Standing Orders of the House of Representatives: provisions relating to Questions. (refer to online copy at <http://www.clerk.parliament.govt.nz/Publications/Other/>)

3. Governance Principles

These principles are about why governance is important, who governs Shared Workspace and how they expect to do that, and who has decision rights.

- 3.1 Shared Workspace is an optional “shared input” to normal agency processes. It is essential that it always focus on meeting agency and user needs, partly because its use is optional rather than mandated.
- 3.2 To guarantee that focus, the best governance arrangement seems to be a club of agencies, with a range of day-to-day governance functions performed by a dedicated group of people (the Programme Managers) in the agency that holds the budget allocation to Shared Workspace.
- 3.3 The Shared Workspace Steering Committee has to pilot and advise the Programme Managers through the establishment phase and design the ongoing governance. Its role concludes when the Club is established, the Governing Body recruited, at which point there is a formal handover to the Governing Body⁵.
- 3.4 The State Services Commissioner gives clear delegation to Shared Workspace Governing Body.
- 3.5 The Shared Workspace Governing Body has to
 - give effect to agency control
 - operate on basis of trust, collaboration, and partnership
 - maximise resources for achievement of club outcomes;
 - reconcile collective interests with interests of individual organisations;
 - recognise agency autonomy and complexity of their business systems
 - designate responsibilities and accountabilities to be met by all parties
 - agree on control and reporting mechanisms;
 - agree the contribution agencies make to running costs⁶
 - tolerate risk when it facilitates innovation and cross agency collaboration
 - advise the Programme Managers when they request it
 - direct priorities for adding and upgrading Shared Workspace tools.
- 3.6 Each year the Governing Body replaces a portion of its members. It aims to renew itself in shifts for continuity. People are asked to join for two-year terms.
- 3.7 The Body proactively recruits from designated Club contact persons. Potential members of the Governing Body would have some or all of these attributes.
 - Interest in whole of government working

⁵ Agreed details of how Shared Workspace Governance operates are described in this document

⁶ The business case was approved partly on the basis of its business model (base costs are met by central funding and members contribute effort and resources for the benefit of all, paying only set fees for some value-added services).

See section 6-5 to 6.10 for operating principles about fees and the “Schedule of Fees” for more information.

- Business orientation
- Understanding of the business use of technology
- Appreciation of the value of information sharing
- Wider, cross-business unit/agency view; and
- Access to influencers and decision makers.

Potential benefits from being on the Governing Body

- network with and learn from people you would not normally work with;
- learn more about whole of government issues, technology, and culture;
- be recognised for your contribution.

3.8 Governing Body members are invited to contribute as individuals, and also represent the collective interest. Benefits of being part of the Governing Body

3.9 Governing Body elects its Chair.

3.10 Governing Body has decision rights to replace its members if they leave the state sector.

3.11 If a member only changes agency then they can choose to stay in the Governing Body.

3.12 If a vote on a recommendation is required, Chair decides how vote will work. However “Unanimous in practice” is preferred.

3.13 The Role of the Governing Body Chair is to

- engender a whole of government view from the Governing Body members
- manage information sharing with DPMC, SSC, Treasury to ensure ‘no surprises’
- represent the Governing Body and be the contact with Club people/e-government Agency Leaders when needed.

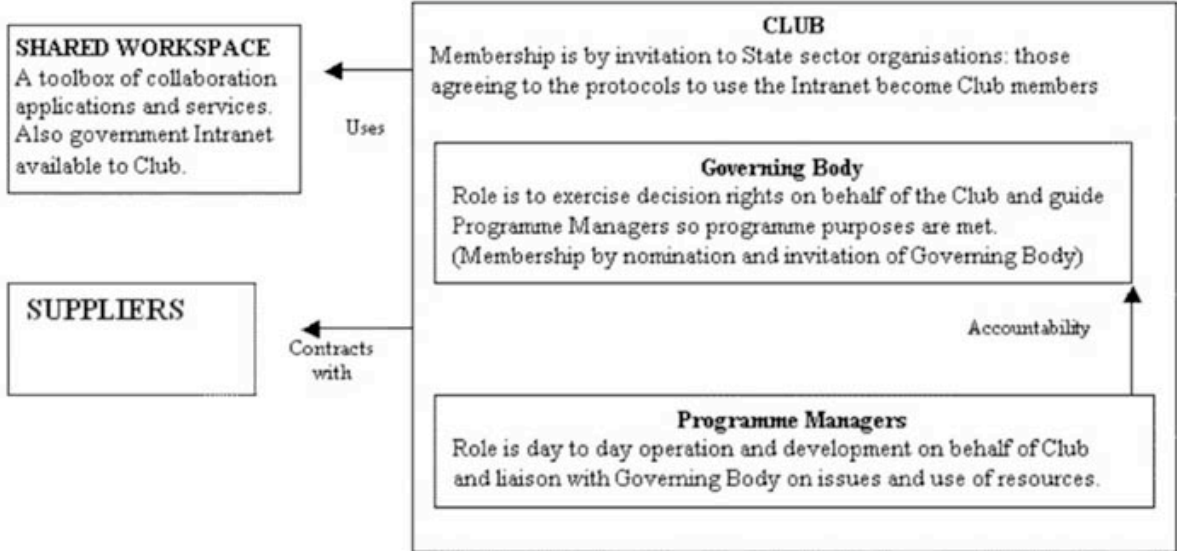
3.14 Potential Club members are State sector agencies that have been invited by the Governing Body to join the Club. The process of becoming a member is the agency signing up to the Intranet protocols and naming who will be the agency's Club contact. Membership is successful when the Governing Body approves the agency’s application.⁷

3.15 The agency’s designated E-government Agency Leader is assumed to be the contact if the agency does not put a different person forward.

⁷ 3.14 was reworded after December 2003 and approved by the Steering Committee on 31st March 2004.

Diagram 1. Shared Workspace Governance Structure

Diagram 1. Shared Workspace Governance Structure



4. Principles about Ownership of Strategy, Infrastructure and Information

Strategy Ownership Principle

4.1 The Club and the Programme Managers have shared responsibility for how well the Shared Workspace is taken up by agencies and used for sharing information.

Infrastructure Ownership Principles

4.2 Infrastructure is hardware, software, connectivity, procedures and expertise.

4.3 It is not feasible for a single agency to fund, operate and support the infrastructure in-house on behalf of all the others.

4.4 It is only feasible for one agency to operate and support the infrastructure if additional funding is appropriated for this purpose.

4.5 Infrastructure support and operation is designed to be outsourced.

4.6 Agencies can provide parts of the infrastructure to Shared Workspace as a natural extension of their core business: if they do, they are responsible for technical services.

4.7 Programme Managers take all other responsibility for provision of technical services.

4.8 Accounting for the capital and operating costs of Shared Workspace is transparent.

4.9 The physical assets are legally owned by the SSC (which received capital and current funding for the purpose in 2003).

4.10 These assets will be managed for the club as a joint resource for the State sector.

Information Ownership Principles

4.11 Policy Framework for Government Held Information guides Shared Workspace policy.⁸

4.12 Information is placed in the Shared Workspace for sharing with target audiences.

4.13 Ownership remains with an agency or parties that supplied the information.

4.14 Collaboration Leaders hold (that is have responsibility for) the information collected in their workspace and coordinate any use/release/delete decisions.

4.15 The Programme Managers do not take over responsibility for information supplied by others. Refer below to Information Management Principles for further detail on information management and OIA/PQ requests.

⁸ It covers quality, consistency, integrity, liability, collection, production, maintenance, confidentiality, access, privacy, pricing, reuse, preservation or disposal, and monitoring and auditing

Identifying who information belongs to

- 4.16 Anonymous contributions will not be allowed in the Shared Workspace.
- 4.17 Where agencies or other parties supply information their branding will be retained. This is so people know where the information is sourced from and credit can be given.
- 4.18 When the Shared Workspace is a supplier of information it can choose to use its own branding.

Information Management Principles

- 4.19 Shared Workspace exists to enable sharing.
- 4.20 All information in the Shared Workspace will be official information. The OIA will apply in exactly the same way as it applies to information held in any agency in any format.
- 4.21 The Collaboration Leader⁹ has responsibility for information in their shared workspace at all stages of its lifecycle.
- 4.22 The Collaboration Leader is always the authoritative source of information (e.g. about the project or group).
- 4.23 No party can treat a tool as the “file” or archive for their information.
- 4.24 All parties are to maintain their own set of all relevant information they share.
- 4.25 The Programme Managers will not keep archives of closed workspaces.
- 4.26 The Programme Managers will permanently keep a description of workspaces and discussion lists that it has hosted.
- 4.27 The Programme Managers will permanently keep copies of documents that Collaboration Leaders have donated to the Shared Workspace E-Library. The E-Library serves as a lasting repository only for the highest value documents and data.
- 4.28 The Programme Managers have custodial responsibility while information is shared in the workspace environment. In practice it means Shared Workspace Programme Managers ensure that information is available to the agencies and members that have access to it, for the agreed duration.
- 4.29 The close-down process identifies data to be transferred back to the Collaboration Leader agency. The end of the closedown-process is the end of the Shared Workspace Programme’s custodianship.

⁹ Definition of Collaboration Leader: The Collaboration Leader is the one that has requested a secure space for sharing information in the Shared Workspace. They invite others to use that space as they need to.

5. Principles regarding Shared Workspace Access

These principles are about who can and cannot access to Shared Workspace tools and services.

Restrictions

- 5.1 Tools and services provided are only to be used for government related business.
- 5.2 The Shared Workspace is not intended to give people such as Members of Parliament, the media, or members of the public access to Official Information other than in accordance with the Official Information Act.
- 5.3 Local government can also use and request to use tools in Shared Workspace but are not eligible for the Club and Governing Body. This is because Shared Workspace funding was allocated for State sector not Local government.

Who grants Access

- 5.4 Collaboration Leaders invite others to access and use that space as they need to. The Collaboration Leader is the group or unit requesting one or more workspace tools. Any group from any State sector organisation can be a Collaboration Leader.
- 5.5 Business, not-for-profit and community groups may be invited by a Collaboration Leader to use one or more Shared Workspace tools other than the Intranet.
- 5.6 In these cases the Collaboration Leader has responsibility to ensure
 - individuals know that they must act professionally and according to public service conventions and practices in return for access.
 - members in that workspace are aware of who has access (e.g. names, agency, and role)
 - there is no compromise of free and frank advice between officials and the Government of the day
 - members know they have to comply with the Official Information Act
- 5.7 Each tool has detailed protocols that a Shared Workspace group agrees to in return for access.
- 5.8 Some protocols are the same for all groups using Shared Workspace tools. These protocols define how members will act to comply with
 - Public Service Code of Conduct
 - Official Information Act
 - Archives Act
 - Copyright Act.
- 5.9 Groups can also add protocols or ground rules specific to them. These can add protection or assurance for members around things like behaviour, intellectual property, compliance with additional legislation, and compliance with security protocols.

Breaches and disciplinary actions

5.10 If any user or agency has a concern about how people are using the workspace then they are requested to let Shared Workspace Programme Managers know without delay so they can make inquiries.

5.11 If Shared Workspace Programme Managers find a person breaching the protocols they can decide to deny further access to that person. That is their decision to make. They must follow this process before taking action to remove access.

- the Chair of the Governing Body must be made aware of the situation
- the Collaboration Leader for that workspace must also be informed.
- Shared Workspace staff disable the person's access temporarily until further investigated.
- Shared Workspace staff investigate and assemble the known facts.
- Shared Workspace staff send the result to the person and ask for their explanation.
- If the explanation is reasonable then Shared Workspace staff re-instate access and advise the Chair of Governing body and Collaboration Leader
- If the explanation is unreasonable then Shared Workspace staff can withdraw access temporarily to emphasise the seriousness of the breach then re-instate or make the ban permanent. Shared Workspace staff inform the same parties as above.
- Shared Workspace staff inform the person of the action taken and explain who they can appeal the decision to.
- The EGU Director is the nominated official to consider to appeals from banned users, and can be advised by SSC Legal team, if needed.
- If the person breaches criminal code as well then the police have to be called.
- If there is a breach of conduct that impacts the ability of the person to continue on that project/network, then this has consequences for the persons' employer so they may also need to know. Informing the person's employer is at the discretion of the Collaboration Leader.¹⁰

5.12 If Shared Workspace Programme Managers find an agency breaching the protocols they investigate and ask for an explanation from the agency club contact. They can then

- confirm Club membership and Intranet access be maintained
- or
- make a written request to the Chair of the Governing Body that the agency's Club membership should be revoked and state why their access should be removed.

Revoking Club Membership and Intranet access following breach of protocols, is the the Governing Body's decision to make.¹¹

¹⁰ 5.11 was reworded after December 2003 and approved by the Steering Committee on 31st March 2004. Further process explanation was added and approved by the Steering Committee May 19 2004.

¹¹ 5.12 was reworded after December 2003 and approved by the Steering Committee on 31st March 2004. Further process explanation was added and approved by the Steering Committee May 19 2004.

6. Principles about Delivery, Support and Fees

Principles for delivery, support and fees ensure parties know what to expect from Shared Workspace and its tools.

- 6.1 Users generally do not need to install any additional software on their PCs (they will only need internet email and web access)
- 6.2 If an agency has firewall rules that prohibit staff using all the functionality of the tools, Shared Workspace commits to working with the agency concerned to find workarounds or compromises if at all possible and for reasonable cost.
- 6.3 If no compromise is found to be possible, a formal rule-change request will be submitted to the agency concerned and the request will be monitored.
- 6.4 Shared Workspace staff are committed to
 - developing people's understanding and use of collaboration tools
 - providing training, assistance, and advice on using Shared Workspace tools
 - supporting users on normal business hours only (Monday to Friday). There is no support service after business hours, on weekends, public or departmental holidays
 - monitoring an email address where all issues and problems can be raised by users. We will respond to issues raised after business hours, on the next business day.
- 6.5 Fees for workspace users are part of the strategy for encouraging uptake
- 6.6 Fees are set by the Shared Workspace club representatives through the Governing Body.
- 6.7 Fees will be reviewed by the Governing Body on a yearly basis.
- 6.8 Fee information will be easy to find and easy to understand.
- 6.9 Billing procedure will ensure fair treatment. For example billing will be detailed and prompt.
- 6.10 An agency client cannot decline to pay all or part of the fee and expect to continue using the tool relating to the fee.
- 6.11 No group will be charged a second fee for transitioning to an upgraded tool.
- 6.12 Tools in the Shared Workspace must represent value for money. This cannot be measured without the help of users and user groups.
- 6.13 Groups will freely provide information on value derived from using the tools and services of Shared Workspace, positive and negative.
- 6.14 Evaluation feedback will be available to the Programme Managers, Club, Governing Body and key funding stakeholders.

- 6.15 Consistently negative feedback on performance will lead to changed tools or services.
- 6.16 When evaluation shows that tools or services are becoming outdated or are not meeting performance expectations, Shared Workspace Programme Managers will plan and guide decisions on upgrading, suspending or gradually withdrawing these tools or services.
- 6.17 The Governing Body may also decide to commission and consider the results of an independent quality assurance before approving the upgrading, suspension or withdrawal of tools or services.
- 6.18 Shared Workspace Programme Managers will then work with any affected user groups on an upgrade/exit plan.

7. Principles regarding Infrastructure and Applications

7.1 The Shared Workspace offers a modular, online, 'toolbox' of applications

7.2 Criteria for selection of infrastructure:

- suited to the intended use
- standards based
- value for money
- fits with existing hosting environment.

7.3 Criteria for selection of application software

- generic;
- known to be needed by cross agency group
- already familiar to users, where possible;
- available from a range of suppliers;
- available for reasonable cost.

7.4 Tool selection is user-needs driven¹². Tools will be selected for use, because testing proves them to be:

- scalable;
- server based i.e. users should need no extra software
- easy to use for both users and administrators
- require minimal user-training
- secure;
- capable of being approved for 'government use'.

7.5 For each tool, there is a prototyping or mock-up stage, used to demonstrate what we are planning to a wide range of people (they can then make concrete suggestions, and test with real data). This puts the valuable user input upfront - at the stage where changes can be easily made - rather than halfway through a timetabled rollout eliminating unsuccessful tools at an earlier stage freeing up resources for other work.

7.6 Suppliers need to know up-front that we only undertake to implement the successful prototypes.

7.7 This approach is preferred because we can use it to:

- test with real-world firewall rules;

¹² The Shared Workspace is user-needs driven, rather than technology driven. We regard technology as an enabler – a means to an end. We work hard to understand what is most important, to most people, before adding new tools to the Shared Workspace toolbox.

- test with the range of agency desktop configurations;
- refine production helpdesk and support processes;
- get input from a range of prototype users
- find out about issues for government intranet managers; and
- build up awareness in agencies that tools and services will be available.

7.8 The Programme Managers will collate requests to update or add tools and pass these requests up to the Shared Workspace Governing Body who will direct the prioritising of upgrades and new tools.

7.9 The Programme Managers will also collate requests for changes and enhancements to existing tools or prototypes. They will prioritise them and manage them through a standardised change control process.

7.10 Shared Workspace will use and observe relevant standards and procedures. This specifically includes

- design principles of the NZ Government Web guidelines for the Intranet
- the e-GIF (e-Government Interoperability Framework).
- State Services Commission's purchasing and contract management procedures.
- security requirements for hosting government held information.

8. Security Principles

- 8.1 Most Shared Workspace systems will be accredited and certified for 'In Confidence'. In future a subset of tools will be accredited and certified for "Sensitive".
- 8.2 Shared Workspace Programme will resource getting and keeping accreditation and certification under SIGD.
- 8.3 As part of this process Shared Workpace Programme will have an independent party audit that configuration and handling of hardware, software, data, backups and traffic are to government-endorsed security standards. This audit will be repeated annually.
- 8.4 Users of the tools are responsible for making sure they are not sharing data that is classified higher than the Shared Workspace tool is accredited for.

9. Principles regarding M_ori Responsiveness

The State Services Commission views increased capability for M_ori responsiveness to be important to the State sector in the short to medium term. This includes “legitimate demands from M_ori for a State sector that is responsive to their needs as citizens, employees and parties to the Treaty of Waitangi and a State sector with mixed performance in this regard”.¹³

- 9.1 Shared Workspace is there to be used by agencies and employees as an enabler for M_ori responsiveness strategies and projects.
- 9.2 Some groups may find appropriate to use it as a tool to help them be efficient with communication processes and help reduce workload on M_ori representatives.
- 9.3 Shared Workspace web collaboration tools will be expected to comply with the technical standards for display of M_ori Macrons, as prescribed in the NZ Government Web Guidelines.

¹³ Refer to the SSC’s website for the [State Services Commission Statement of Intent 2003](#) page 4. *Operating Environment*.

10. Principles for Evaluating Shared Workspace

10.1 The Shared Workspace will use an evaluation framework to:

- check key standards are being kept up;
- detect issues and risks;
- improve systems and procedures;
- track usage patterns;
- verify benefits sought by these stakeholders : Collaboration Leaders (the people that initiate a collaboration space); Programme Managers (Workspace staff in SSC); Funders (Governing Body, SSC, Treasury)
- verify that those stakeholders are seeing the benefits they sought;
- keep stakeholders informed
- document accomplishments.

10.2 Evaluation measures have to be

- simple, understandable, and repeatable;
- timely;
- economical to collect and report; and
- meaningful to funding stakeholders.

Examples of evaluation measures planned

Stake-holder= Funders

Measure= Financial performance

Type= % budget spent

Method= Financial reports

Frequency= Monthly

Stake-holder= Collaboration leaders (the people that initiate a collaboration space)

Measure= Level of use

Type= Peak use times, Number of visits, Most frequent users visiting, Who didn't visit, Popular pages

Method= Web activity logs

Frequency= Regular reports (at least monthly)

Stake-holder= Programme managers

Measure= Uptake

Type= Measures of customer base (number of clients, sector coverage etc), growth, number of enquiries. Level of repeat business

Method= Client register

Frequency= Periodic reports (e.g. annual).