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### **Abstract**

This document considers the activities of the DT6 Training Work Package throughout the project. It evaluates the achievements of each of the tasks and looks at the long term impact of the training activities on delegates' daily work and their interest in the Planets solution. It concludes with a consideration of how far overall objectives have been met and a list of recommendations for any future Planets training programmes.

### **Keyword list**

Training; dissemination; outreach; training events; evaluation; impact assessment; online training

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## EXECUTIVE SUMMARY

The DT6 Training Work Package has played a significant role within the Planets project, delivering a series of activities which teach potential users about tools and services and provide an opportunity for direct communication between end users and the project's experts. The various initiatives have fostered an interest in the solutions provided and encouraged a variety of organisations to consider take-up of Planets.

Section one of this document outlines the overall objectives for the Work Package which have been followed since the start of the project.

Section two goes on to summarise the various tasks throughout DT6 and their results and outputs. It describes each phase of the Work Package and evaluates its achievements and importance for the overall training programme.

Section three looks at the longer term impact of the training activities, consolidating the results of an event follow-up survey and assessing the extent to which knowledge learnt through the training events has impacted on delegates' work activities and their interest in digital preservation and Planets.

Finally, section four considers the extent to which DT6 has met its overall objectives, and provides a list of recommendations for any future Planets training programme based on lessons learnt throughout the project.

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## 1. Introduction

The Planets DT6 Training Work Package aims to provide user communities with the knowledge and skills they need to adopt Planets in their organisations, using a variety of initiatives and activities.

The overall objectives of the Work Package are to:

- Maximise take-up of Planets by providing a link between the innovations of the project and their exploitation and adoption by user and supplier communities;
- Offer learning opportunities to staff in priority institutions to promote the take-up of Planets methods, practices and technologies;
- Provide capability building training for consultancies, technology developers, and vendors to enable them to integrate their offerings within Planets or Planets within their offerings;
- Deliver an Online Learning Support Facility to support face-to-face courses and to offer additional education opportunities to our primary user communities;
- Promote collaboration with other EU preservation projects to ensure an optimal digital preservation educational programme for the European Community.

The Work Package began work in m6 with activity spanning the remainder of the project. Nearly all project partners contributed effort to DT6, and as such it has become a high profile Work Package that has involved most of the project at some stage. The effort contributed has ensured the successful planning, delivery and evaluation of a training programme that has had a significant impact on target communities across Europe.

This document has two purposes. The first is to consolidate the results of the Work Package, summarising the impact each has had on the programme as a whole, and bringing together outputs for future reference by the follow on organisation, the Open Planets Foundation (OPF). The second is to consider the longer term impact of the programme, namely its influence on the subsequent working practices of event attendees and the extent to which Work Package activities have influenced attitudes towards Planets. A final list of conclusions and recommendations will look at overall success against the original objectives and what knowledge should be transferred to future Planets training programmes.

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## 2. Work Package outputs and impact on training programme

### 2.1 Overview

The following table summarises each task across the Work Package and lists related outputs. This is followed by a consideration of the main aspects of the Work Package, highlighting achievements and the impact activities have had on the overall training programme.

Task number	Task description	Deliverables and milestones (contractual dates)	Outputs (delivery dates)
DT6/T1	Training plan	D1: Planets Training Plan (m11)	D1: Planets Training Plan (m13). Available at: <a href="http://www.planets-project.eu/docs/reports/Planets_DT6_training_plan_final.pdf">http://www.planets-project.eu/docs/reports/Planets_DT6_training_plan_final.pdf</a>
DT6/T2	Training development		Organiser and trainer packs
DT6/T3	Training delivery and assessment (Year 2)	M1: Launch first training course (m16)  D2: Report on progress of training programme (m24)	Vilnius training event (m17) Vienna training event (m23)  D2: Report on progress of training programme (m24). Available at: <a href="http://www.planets-project.eu/docs/reports/Planets_DT6-D2_ReportOnTrainingProgramme_Final.pdf">http://www.planets-project.eu/docs/reports/Planets_DT6-D2_ReportOnTrainingProgramme_Final.pdf</a>
DT6/T4	Training delivery and assessment (Year 3)	M3: Delivery of 2008 training course (m31)  D3: Second report on progress of training programme (m35)	Prague training event (m29) Barcelona training event (m34)  D3: Second report on progress of training programme (m37). Available at: <a href="http://www.planets-project.eu/docs/reports/Planets_DT6-D3_Training_Programme.pdf">http://www.planets-project.eu/docs/reports/Planets_DT6-D3_Training_Programme.pdf</a>
DT6/T5	Revised training plan	D4: Revised training plan (m37)	D4: Revised training plan (m39). Available at: <a href="http://www.planets-project.eu/docs/reports/Planets_DT6-D4_Training_Plan.pdf">http://www.planets-project.eu/docs/reports/Planets_DT6-D4_Training_Plan.pdf</a>
DT6/T6 DT6/T6a DT6/T6b DT6/T6c DT6/T6d DT6/T6e	Training delivery (Year 4)  Copenhagen Training and Outreach event Sofia Training and Outreach event Bern Training and Outreach event London Training and Outreach event Rome Training and Outreach event	M4a: Training course #1 (m37) M4b: Training course #2 (m40) M4c: Training course #3 (m42) M4d: Training course #4 (m44) M4e: Training course #5 (m47)	Copenhagen training event (m37) Sofia training event (m40) Bern training event (m42) London training event (m45) Rome training event (m47)
DT6/T7	Online learning support facility	M2: Launch of online support facility with materials for first course (m16)  M5: Online training materials (m48)	Launch of DPE and Planets Moodles with material to support Vilnius event (m17)  Online training support facility launched (m48)
DT6/T8	Evaluation of training programme		

DT6/T8a	Year 4 event evaluation reports		Event evaluation reports for all Year 4 events
DT6/T8b	Year 4 evaluation report	D6: Six-monthly progress report - internal (m42) D5: Year 4 evaluation report (m47)	D6: Six-monthly progress report – internal (m42) D5: Year 4 evaluation report (m47). Available at: <a href="http://www.planets-project.eu/docs/reports/Planets_DT6-D5_Year4EvaluationReport.pdf">http://www.planets-project.eu/docs/reports/Planets_DT6-D5_Year4EvaluationReport.pdf</a>
DT6/T8c	End of project impact assessment	D7: End of project impact assessment (m48)	D7: End of project impact assessment (m48)

*Table 1: overview of DT6 tasks and outputs*

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## 2.2 Planning and development (T1, T2, T5)

A substantial amount of activity has taken place in the planning and development phases of the training programme. The original Planets Training Plan (DT6-D1) delivered a vision for the Work Package which was unique in both its ideas and detail. The plan looked at developing a programme using a modular approach, which would provide self-contained sessions which could be integrated with other projects at collaborative events, as well as combined for longer Planets-specific events as tools and services were finalised. The document also provided a significant amount of detail on how the event activities would be documented and evaluated, which was then taken forward into the training development task and the production of the organiser and trainer packs. These packs offered a structure to the organisation of the training events that was to set a precedent for the remainder of the project.

As initial courses were delivered across Years 2 and 3 as part of collaborative activities it became clear that the modular programme required further refinement in order to deliver Year 4 events which could reflect the tools and services which were now finalised. Alongside this, it was identified that further documentation would be useful in the planning of courses, especially as DT6 would be working with DT10 in order to organise the events. The DT6-D4 revised training plan was therefore successful in its delivery of a refined programme that combined earlier modules and covered all the main aspects of the Planets project. The inclusion of a detailed timeline and numerous templates also ensured each course could be planned, delivered and evaluated in a consistent manner. The ease with which the Year 4 events were administered demonstrates the value in this documentation.

All planned activities needed to be delivered within budget. The Work Package had a €71,000 dedicated budget for training activities which was used during the final year of the project. As part of the revised training plan task organisers developed an overall plan for the budget with individual allocations for each event. These amounts were further divided between venue and catering costs and the expenses of speakers travelling to the event, with delegate fees also being used to recover some of the costs of the event production. This detailed planning ensured the training budget was handled effectively. The final financial accounts for the Work Package can be seen in Appendix A (confidential).

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## 2.3 Event delivery and evaluation (T3, T4, T6, T8)

After each stage of planning and development came the training programme rollout. Two courses were delivered in Year 2, two in Year 3, and five in Year 4. Most of the Year 2 and Year 3 events took place as part of a collaborative initiative with other digital preservation and FP6 projects, most notably DPE, CASPAR and nestor. This strategic and coordinated approach has enabled the Planets training programme to have a much wider impact on digital preservation training for the European Community rather than diluting efforts through focusing on project-specific training throughout the duration of the project. The partnership of the WePreserve<sup>1</sup> consortium, initiated by DPE, Planets and CASPAR, offered the opportunity to deliver more general introductory events that included sessions about Planets tools, which was a much more appropriate form of training in the early stages of the project as tools were emerging at different stages. It also gave the opportunity to provide training as part of wider collaborative meetings as well as ensuring the promotion of events by other supporting digital preservation projects such as the Digital Curation Centre and nestor.

In addition to the events organised by the DT6 Work Package, it is worth noting that certain sessions from the training courses were also used by project partners for other outreach events, such as the London digital preservation planning briefing<sup>2</sup> and a Dutch Planets event in December 2009. This again allowed training to reach additional audiences and in turn widened the impact of

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<sup>1</sup> <http://www.wepreserve.eu/>

<sup>2</sup> [http://www.planets-project.eu/events/bl\\_planning/](http://www.planets-project.eu/events/bl_planning/)



the overall programme. As these events were not DT6 activities their statistics are excluded from this report.

The Planets training programme has educated a large number of people throughout Europe and indeed the rest of the world. Over 350 individuals have received training on Planets tools and services, either as part of the more general digital preservation courses or through dedicated Planets events. The success of the Planets training events has already been outlined in the end of year reports (D2, D3 and D5), which provide detailed evaluations of individual courses. The following is a summary of its success and achievements.

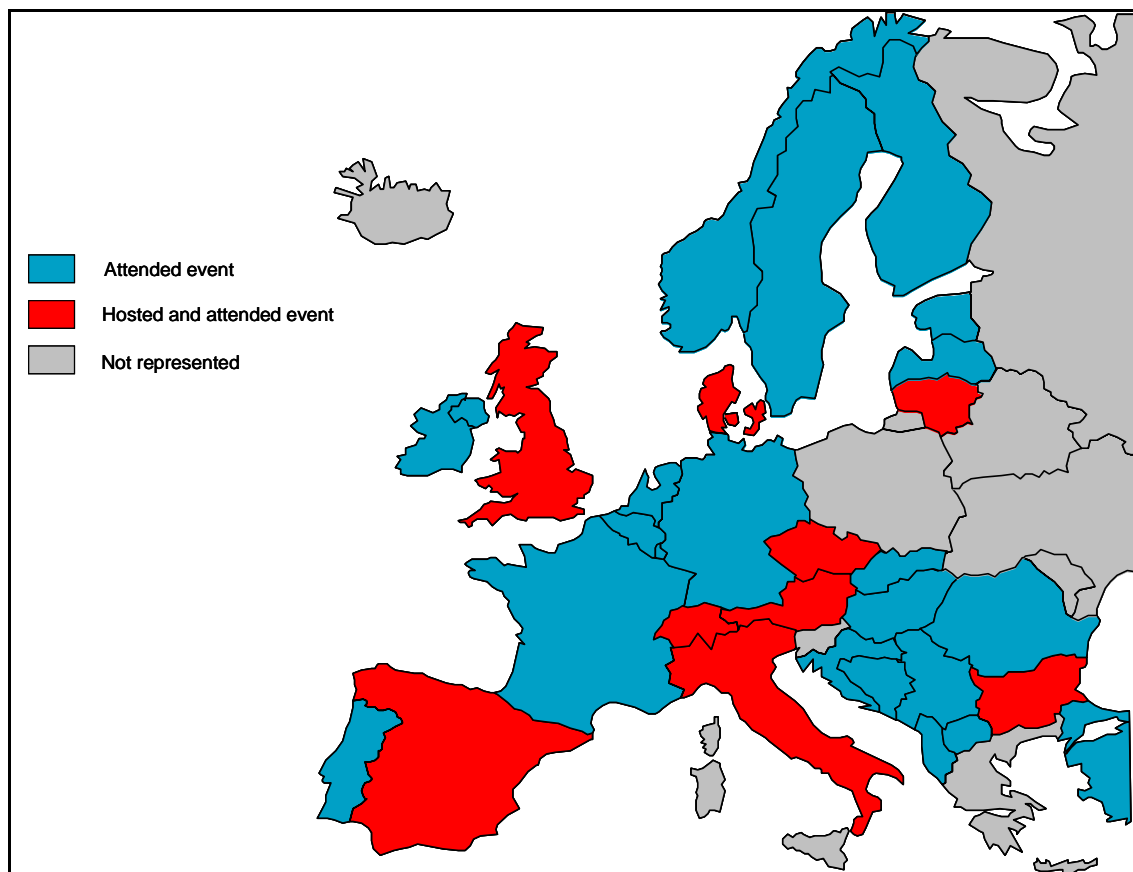
The attendance at each event rose steadily, indicating the success of Planets and the DT6 Work Package in raising awareness and interest in the project and its training events. Each event was publicised extensively through a variety of communication channels including Planets mailing lists and publications, national mailing lists for the target communities and local contacts and organisations established for each region. The only events which fell below target were those of Vilnius and Sofia (anticipated due to the relatively small amount of digital preservation activity within those regions) and Rome which, due to the cancellation of all flights across Europe immediately before and during the course of the event, had a severely reduced actual attendance. Registration for this event (in brackets) was also low, again anticipated due to the low level of digital preservation activity in Southern Europe and lack of project consortium partners/contacts in the region.

The following table shows the actual attendance versus target for each event.

Event	Target	Number attended
Vilnius	25	21
Vienna	40	45
Prague	25	27
Barcelona	25	33
Copenhagen	50	57
Sofia	30	27
Bern	50	57
London	50	72
Rome	50	14 (37)
TOTAL	345	353

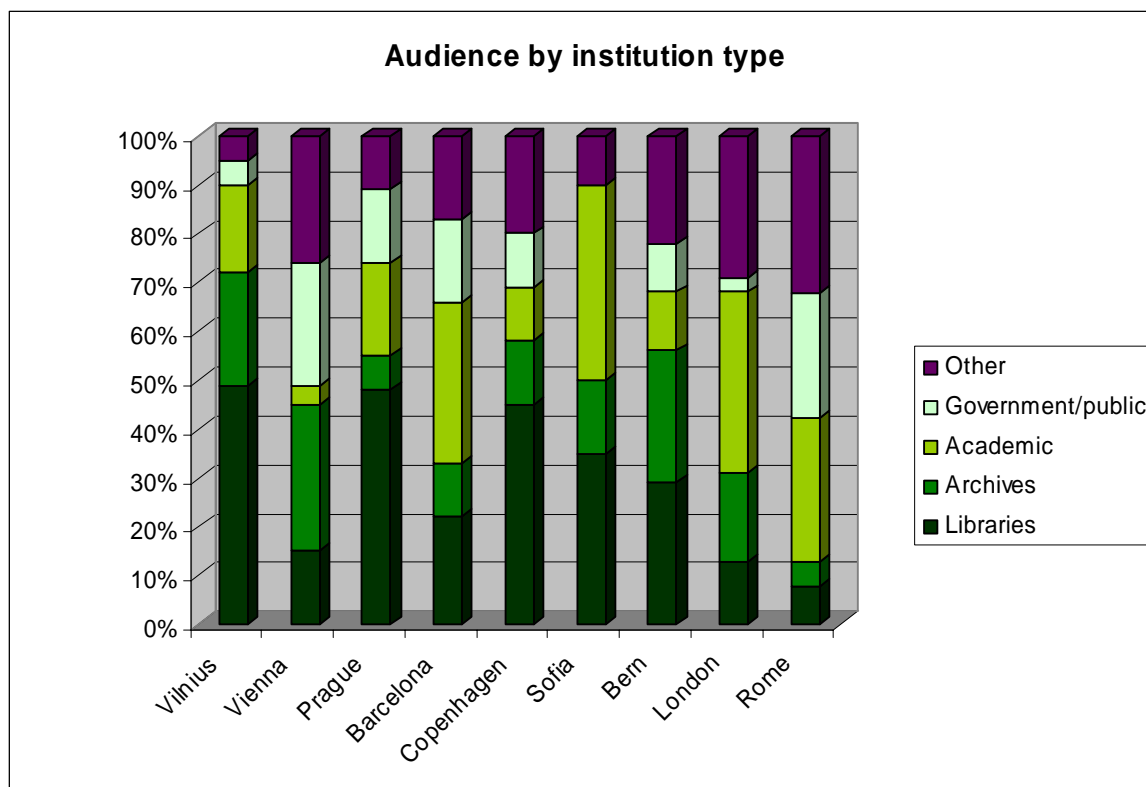
*Table 2: Attendance at Planets training events*

The variety of countries which received training on Planets, particularly throughout Europe, also highlights the programme's impact. Delegates from over thirty countries attended the events, with the majority of these being within Europe. The following map demonstrates how extensive the training has been within the region.



As the map indicates, delegates and in turn organisations from a significant number of countries in Europe received training on Planets. Almost all areas of Europe were represented, even regions which have relatively low levels of digitisation or digital preservation activities. The map also provides a visualisation of the distribution of the Planets courses, which through their strategic positioning have allowed delegates from all parts of Europe to attend a course within their region.

At almost all events the proportion of the audience which comprised libraries, archives and other large content-holding institutions reached target, demonstrating the programme was successful in raising awareness and interest amongst its target communities. The following chart shows the percentages for institution types at each event (the Rome figures are based on registered delegates as opposed to actual attendees). The higher percentage of 'other' institutions at the final two events indicates interest from other groups outside the target audiences is growing.



As courses were delivered, the Work Package constantly assessed the training programme and looked at ways it could be improved and developed. All attendees of events were asked to complete a feedback form in order to evaluate the success of various aspects of the event. Each event aimed to score at least 70% of delegates rating them good or better on a variety of event and organisational criteria. The following tables show the success of this aim for both the joint collaborative events and the Planets-specific courses, as in almost all cases the overall averages exceeded target.

		Speakers	Teaching methods	Event structure	Addressed topic	Background documentation	Organisation
<b>Target %</b>		<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>
<b>Vilnius</b>	Actual	84	84	100	95	79	100
	Variation	14	14	30	25	9	30
<b>Prague</b>	Actual	87	64	87	84	63	100
	Variation	17	-6	17	14	-7	30
<b>Barcelona</b>	Actual	77	77	76	94	43	94
	Variation	7	7	6	24	-27	24
<b>Overall average</b>		<b>83</b>	<b>75</b>	<b>88</b>	<b>91</b>	<b>62</b>	<b>98</b>

Table 3: Criteria scores for collaborative training events

		Understanding challenges	Planning process	Planets approach	Plan and carry out activity	Address topic fully	Met expectations	Attend similar events	Speakers	Structure	Content	Documents	Cost	Administration	Venue and Catering	Communication
<b>Target %</b>		<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>
<b>Vienna</b>	Actual	70	87	91	68	83	82	78	83	70	70	78	70	74	74	82
	Variation	0	17	21	-2	13	12	8	13	0	0	8	0	4	4	12

Table 4: Criteria scores for Vienna preservation planning training event

		Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
<b>Target %</b>		<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>	<b>70</b>
<b>Copenhagen</b>	Actual	89	89	68	71	64	81	88	88	69	93	93	61	71	69	93	93	96	86
	Variation	19	19	-2	1	-6	11	18	18	-1	23	23	-9	1	-1	23	23	26	16

<b>Sofia</b>	Actual	90	95	85	90	70	90	85	100	100	100	100	80	85	80	90	100	95	90
	Variation	20	25	15	20	0	20	15	30	30	30	30	20	15	10	20	30	25	20
<b>Bern</b>	Actual	74	87	71	77	66	83	79	94	93	90	87	55	77	70	84	84	90	84
	Variation	4	17	1	7	-4	13	9	24	23	20	17	-15	7	0	14	14	20	14
<b>London</b>	Actual	84	100	58	95	84	82	89	84	86	95	92	76	76	67	86	94	100	97
	Variation	14	30	-12	25	14	12	19	14	16	25	22	6	8	-3	16	24	30	27
<b>Rome</b>	Actual	100	88	56	67	75	100	100	100	100	100	100	100	88	88	75	88	88	88
	Variation	30	18	-14	-3	5	30	30	30	30	30	30	30	18	18	5	18	18	18
<b>Overall average</b>		<b>87</b>	<b>92</b>	<b>68</b>	<b>80</b>	<b>72</b>	<b>87</b>	<b>88</b>	<b>93</b>	<b>90</b>	<b>96</b>	<b>94</b>	<b>74</b>	<b>79</b>	<b>75</b>	<b>86</b>	<b>92</b>	<b>94</b>	<b>89</b>

Table 5: Criteria scores for Year 4 Planets training events (all days delegates)

At the end of each year the Work Package also delivered a progress report on the training programme (D2, D3 and D5) which summarised the feedback from events and looked at ways the programme could be improved and developed during the next year. This periodic assessment of the whole programme allowed the Work Package to consistently compare plans and results to the overall objectives and ensure the original vision for the programme was maintained. The importance of all these evaluative activities cannot be underestimated. Constant evaluation of the programme ensured that individual aspects of courses were consistently revised based on feedback, and that the overall programme was revised due to developments within the project and the activities of other digital preservation projects. These actions have ensured that the programme maximised its impact on the learning experience of delegates and encouraged potential take-up of the project.

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## 2.4 Online training (T7)

The online training activities have provided support for the face-to-face events of the training programme. At the start of Year 2 Planets established its own Virtual Learning Environment (VLE) using the open source software Moodle, alongside those of the FP6 DPE and CASPAR projects, with the aim to provide pre-course support for collaborative events. Some use was made of the Moodle for the first event in Vilnius, but for subsequent Year 2 and 3 events it was decided to place any materials on one Moodle (DPE) in order to avoid confusion for delegates.

The use of materials on the Moodle sites was lower than anticipated. Not all delegates had used the system previously and did not have the time to learn how it worked. Feedback from events suggested delegates needed access to the materials at quite an early stage to enable them to navigate the VLE effectively. In addition speakers were also unfamiliar with the environment and had difficulties uploading materials themselves, which had originally been the anticipated process. After the use of a Planets webpage to provide pre-course materials for the Copenhagen event, it was decided that the Planets website would be used to provide online training for the remainder of the project.

With the platform agreed the Work Package then proposed a plan for developing materials by the end of the project that would provide a lasting legacy to the training programme. The following resources were defined:

- A series of narrated audio-presentations from the face-to-face events.
- A set of technical summaries prepared by IBM for technical support and developer staff.
- An online tutorial and workbook to guide users through the Plato planning tool.
- An annotated reading list of useful related resources.

The online training materials were launched in m47 alongside the final training event.<sup>3</sup> Whilst the late production of the resources themselves means that their success cannot be realistically measured, much of the material is based on that used either in or for the Year 4 training events, and has therefore been tested and evaluated during the five events. The materials therefore offer individuals and institutions unable to attend courses the opportunity to understand the key learning outcomes and allow the contents of the sessions to be recaptured beyond the events themselves. In this way, the online training materials can be used to support and refresh the learning of past delegates, as well as being of use to those unable to attend a training event in person.

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## 3. Long-term impact of the DT6 Training Programme

The previous section has outlined the immediate achievements of the Work Package based around how activities met each DT6 task. To truly judge the success of the training programme, however, it is important to consider the real impact that the programme has had on its attendees' working

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<sup>3</sup> The online training materials are available on the Planets website at <http://www.planets-project.eu/training-materials/>.

practices and in turn the national library and archive and digital preservation communities of Europe. This section will consider the extent to which skills gained on the course have been transferrable into an institutional setting, and if the events have encouraged delegates to take a more active role in the Planets and digital preservation communities.

### 3.1 Post-event impact survey

In order to ascertain the impact of the training programme over the long term, the Work Package conducted a post-event survey in m47, approximately one month before the end of the project. The survey attempted to find out two things; firstly, the extent to which delegates had implemented the knowledge and skills they had gained on the course, and secondly, whether the events had led to any collaborations or increased involvement for delegates in digital preservation forums or Planets activities.

A questionnaire was designed with a set of yes/no questions asking for further description where required (see Appendix B1 for the questionnaire template). The questionnaire was issued to all known attendees of the training courses across the programme (excluding Rome which had not yet taken place), which totalled 339 individuals. Respondents were given three weeks to complete the questionnaire, with a reminder being sent five days before the close of the survey (any bounce-backs from the original mail-out were removed before the reminder was sent). A small prize was offered as an incentive for delegates to respond.

Seventy delegates responded to the questionnaire, giving an overall response rate of 21%. A number of these responses were only partial, with not every question being completed (see Appendix B2 for response figures for individual questions). The following table shows the percentage of responses for each event against the number of attendees. This varied between events and did not seem dependent on when the event took place; indeed delegates from the first training event in Vilnius provided the second-highest percentage of responses across the programme, only slightly less than the highest response rate of the later Bern event.

Event	Number attended	Number of responses to questionnaire	In percent
Vilnius	21	6	29
Vienna	45	7	16
Prague	27	2	7
Barcelona	33	7	21
Copenhagen	57	14	25
Sofia	27	4	15
Bern	57	17	30
London	72	13	18
<b>TOTAL</b>	<b>339</b>	<b>70</b>	<b>21</b>

#### 3.1.1 Implementation of knowledge and skills

Three questions were asked focusing on this area. The first asked whether since attending the course delegates had gained knowledge and/or skills which they had been able to implement in their work. Fifty replied that they had, with only four claiming they had not. Some responses commented that the event had helped them to understand the general issues surrounding digital preservation, whilst several specified migration and emulation, significant properties and preservation planning as skills which they had been able to implement. A number stated that nothing had yet been implemented as they were not at that stage within their organisation, but that the training had helped them understand how to approach the issue; as one delegate responded: "We are in the process of creating strategies for preservation and Planets has given me awareness about tools and services that I can use to achieve that".

The second question inquired whether as a result of attending the course delegates had introduced, or anticipated introducing, new activities/initiatives in their organisation to preserve digital content. Thirty nine delegates concluded they had, specifying a variety of activities including attributing metadata and significant properties and general digitisation. One delegate commented that whilst a number of initiatives had already been implemented in their organisation and these had stayed the same, "Planets does provide useful tips and methodologies to improve the effectiveness of those". Fifteen delegates specified that they had not introduced any new activities as a result of attending the course.

The third and final question in this category considered whether delegates' organisations had implemented, or intended to implement, any of the Planets tools and services. There were an almost equal number of positive and negative responses to this question. General consensus seemed to be that many were planning to but had not yet done so, in some cases just beginning initial testing with some of the tools. Out of twenty-seven positive responses, thirteen specifically named Plato and/or the Testbed as services they planned to implement.

### 3.1.2 Involvement in digital preservation community and Planets

This second part of the questionnaire asked five questions. The first asked if any collaborations or working relations had been established as a result of attending a Planets course. Twenty-six delegates specified they had, in particular citing continued contact and sometimes even collaboration with speakers. Five delegates specified new partnerships or collaboration with other institutions who had attended the course. The responses to this question demonstrate the importance of the face-to-face aspect of the programme and its role in encouraging networking and in fostering the development of the digital preservation community.

The second question asked if delegates had become involved in discussions about issues raised in the course through discussion lists or forums. Only thirteen responses stated that they had, listing discussions with colleagues on a local level as well as following discussions through JISCmail lists and the DPE and DCC forums. This perhaps reinforces the conclusion from the previous question that face-to-face events are a lot more effective in encouraging people to share thoughts and ideas than other remote online possibilities.

The next two questions asked whether delegates had participated in any further digital preservation training or Planets dissemination activities since attending the course. A relatively low number of positive responses were received to both of these questions, suggesting it might be useful to place more emphasis on attracting previous delegates to future events. Further training included another Planets event (one response), Digital Preservation Coalition and DELOS events (two responses) and various other local workshops. Of the other Planets dissemination activities, the majority of individual comments (four responses) specified the Planets community and newsletter as the activities they had signed up to.

The final question asked whether attendees or their organisation would consider subscribing to Planets technology or becoming a member of the OPF follow on organisation. Forty-three respondents answered that they would consider this, with only ten specifying no. The individual comments indicated that many were still undecided, or that whilst they were interested the advantages of joining would need to be weighed against the costs of subscription.

### 3.1.3 Conclusions

The post-event survey confirmed that the Planets training events have had a long-term impact on delegates' preservation activities within their organisations, in particular providing them with the skills necessary to tackle the issue of digital preservation and to implement new activities as a result. The continued interest in the Planets tools and services is also clear, with a number of organisations already testing components and interested in the work of the OPF. The events have been significant in bringing together individuals and institutions and encouraging networking and the sharing of ideas, relationships which have continued beyond the events themselves. Perhaps where the events have had less impact is encouraging delegates to become involved in other digital preservation and Planets activities, whether these be contributing to forums or participating in other training or Planets dissemination activities. This suggests further effort should be dedicated to promoting future activities with previous attendees who will already have an interest in and understanding of the tools and services on offer.



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## 4. Conclusions and recommendations

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### 4.1 Fulfilment of Work Package objectives

Planets has delivered a successful training programme which feedback and statistics indicate has had a significant impact on digital preservation training in Europe and on the working practices of delegates. The original overall objectives for the Work Package have therefore been met in most areas:

- *Maximise take-up of Planets by providing a link between the project and user and supplier communities*  
 By delivering events that bring together the project experts and potential users the Work Package has fulfilled its role as the link between the project and user communities. The feedback from event delegates shows that these relationships have been fostered after the events themselves and have proved valuable in ensuring further promotion and potential take-up of the project. The work with the Outreach Work Package has further ensured that DT6 was able to reach a wider group of users than just those interested in attending hands-on training sessions.
- *Offer learning opportunities to staff in priority institutions to promote the take-up of Planets methods, practices and technologies*  
 The Planets training programme has fully met this objective by training 350 delegates through nine training events.
- *Provide capability building training for consultancies, technology developers, and vendors to enable them to integrate their offerings within Planets or Planets within their offerings*  
 The possibility of capability training has not been fully utilised, mainly due to completion of tools being later than anticipated, and the limited effort and resources available to deliver what would have needed to be quite different and much more technical courses. The issue of engaging this user group has been addressed by other DT Work Packages, most notably in the supplier vendor briefing organised by DT10.
- *Deliver an Online Learning Support Facility to support face-to-face courses and to offer additional education opportunities to primary user communities*  
 The project made use of collaborative Moodle during the first three years of the project which did deliver materials to support the early face-to-face courses. Due to the difficulties and limitations of the VLE, Year 4 event support materials were hosted by the Planets website, which proved an easy and successful way for delegates to access resources. The late production of completed tools and demonstrations meant that complete and coherent online training materials on Planets could not be realistically produced until the end of the project, but a collection of materials from the events and other supporting resources were launched in m47.
- *Promote collaboration with other EU preservation projects to ensure an optimal digital preservation educational programme for the European Community*  
 The work with other FP6 and European digital preservation projects has been invaluable in ensuring a successful digital preservation training programme for European countries and in raising the profile of Planets through the wider digital preservation community. Collaboration avoided the duplication of introductory topics and courses and provided a clearer structure to events throughout the region. The wepreserve platform provides a one-stop for institutions interested in the activities of the European projects and ensures heightened promotion of events through its contacts.

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### 4.2 Recommendations for future Planets training programmes

The achievements and lessons learnt from the Work Package activities are vital for consideration in the development of any future Planets training activities. Below is a list of high level

recommendations which should be considered at the overall programme level. More specific recommendations for course content and structure can be seen in the recommendations from each end of year report.

- *Continue to foster community developed by the training programme* – one of Planets' key dissemination aims was to raise awareness of its approach and in turn predispose people to adoption. The training events have clearly achieved this aim, with the fostering of a group interested in the project's outputs and keen to consider future implementation, as well as to continue communications with speakers and other delegates. The post-event survey however indicated that these groups have not always participated in further Planets activities as a result of their learning experience. Any follow-on organisation should therefore look to convert interest amongst this group into involvement and adoption. Offering future opportunities for continued training and the exchange of ideas for previous delegates will be key to ensuring wide take-up of Planets and that the actions initiated by DT6 are continued.
- *Ensure close links with overall dissemination activities of follow-on organisation* – the joint activities with the Outreach Work Package demonstrated that this kind of collaboration optimises interest in and take-up of the training activities. The strategic and coordinated approach has led to a focus on delivering fewer high quality and targeted events with clear objectives. This has helped to encourage full attendance whilst making the best use of resources, and the evaluation process has ensured continual refinement.
- *Target regions of Europe underrepresented at Planets events* – whilst course delegates from most countries in Europe attended, certain areas were underrepresented and some larger countries such as Poland and Greece had no attendees at all. In order to encourage potential take-up of Planets in these regions it will be worthwhile for any follow-on organisation to investigate the status of digital preservation within these countries and consider ways to ensure awareness is such that Planets is the first consideration when the appropriate stage is reached.
- *Diversify training methods and learning techniques for different sectors and geographical regions* – DT6 focused on face-to-face events supported by online materials, but now there is a clearer package of tools any training can take on a more diverse and flexible approach which will ensure maximum impact across a wider variety of audiences. The modular approach which was experimented with during the project could be extended in order to design courses and programmes which meet different requirements depending on the sector and region of Europe. These could vary from bespoke training of organisations and regions that have high potential for subscribing to Planets (e.g. UK and national libraries and archives) through to more general promotion and shorter 'taster' training events for sectors and regions of Europe where interest is just emerging. This approach would also be useful in designing training for service developers and IT staff, who will require yet another type of education which is more in-depth and technical than that needed in other occupations.
- *Continue to investigate opportunities for collaboration with other digital preservation projects* – this joint work has been an excellent way of raising awareness of what Planets can offer to a broader digital preservation community. Many attendees of the joint events may not have registered for a Planets specific course, but as a result of learning about the approach have gone on to test and implement elements within their institutions. The DT6 programme has fostered an interest in Planets but maximum take-up cannot be done in isolation from the wider digital preservation community. Future joint activities could include not only events but also initiatives such as an online information portal, forum or online community, resources that were also identified as in demand by the Planets Market Survey<sup>4</sup> and Supplier Vendor Briefing.
- *Build on the planning, development and evaluation tools from the project* – a clear training plan will be required at the start of any new Planets training programme to ensure that all the above recommendations are fully addressed, and only by doing this will training activities for target groups and take-up for Planets be maximised. The organisation and

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<sup>4</sup> <http://www.planets-project.eu/docs/reports/planets-market-survey-white-paper.pdf>

evaluation templates produced will allow for effective delivery of events and continued assessment of the success and impact of a training programme.

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## Appendix A Post-event survey

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### A.1 Questionnaire template

[Front page]

As a former delegate of a Planets training event, you have been invited to complete this questionnaire in order for us to determine what impact the course has had on your working activities and on your participation in Planets and the digital preservation community. Your responses will help us improve any future training events. Please take a few minutes to complete the following questions. Thank you.

[Pg 2]

Name:

Organisation:

Course attended (please tick):

#### Joint DPE/Planets/CASPAR/nesstor events

- 'Principles of digital preservation: a hands-on approach', Vilnius, October 2007
- 'Starting out: preserving digital objects – principles and practice', Prague, October 2008
- 'The preservation challenge: basic concepts and practical applications', Barcelona, March 2009

#### Planets events

- 'Planning the future with Planets: a preservation planning tutorial', Vienna, April 2008

#### 'Digital Preservation – The Planets Way' events

- Copenhagen, June 2009
- Sofia, September 2009
- Bern, November 2009
- London, February 2010

(Tick boxes)

Are you happy for us to use your individual responses in Planets reports and publications?

- Yes
- Yes if anonymised
- No

(Tickboxes)

[Pg 3]

#### **Implementation of knowledge and skills**

As a result of attending the course:

- Have you gained knowledge and/or skills which you have been able to implement in your work?

Y  
N

*Please describe*

- Have you introduced, or do you anticipate introducing, new activities/initiatives in your organisation to preserve digital content?

Y  
N

*Please describe*

- Have you/your organisation implemented, or do you intend to implement, Planets methodology, tools or services (e.g. Plato or Testbed)?

Y  
N

*Please describe*

[Pg 4]

**Involvement in the digital preservation community and Planets**

Following the course have you or your organisation:

- Established any collaborations/working relationships with other attendees from the course?

Y  
N

*Please describe*

- Become involved in/continued discussions about issues raised in the course through any digital preservation forums/discussion lists?

Y  
N

*Please describe*

- Undergone or registered for further training in the preservation of digital content?

Y  
N

*Please describe*

- Taken advantage of other Planets dissemination activities (e.g. Planets community, Market Survey, Supplier Vendor Briefing or other events)?

Y  
N

*Please describe*

Would you or your organisation consider subscribing to Planets technology or becoming a member of the Open Planets Foundation? OPF is the not-for-profit organisation, which will follow the end of the project and continue to develop, support and distribute Planets results.

Y  
N

*Other, please comment:*

Thank you for your assistance.

