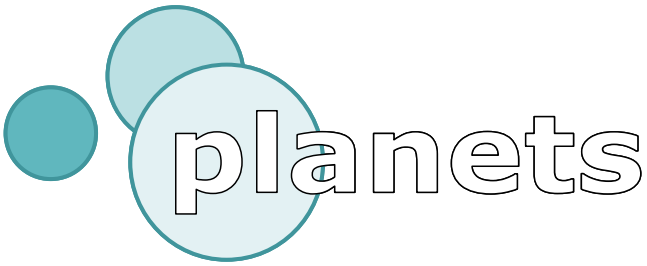

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Abstract
This document outlines a plan for the Planets training programme. It lists the communities and teaching methodologies which have been defined, the learning objectives and content of individual courses, the locations and dates of individual events, and the resources that will be required to deliver the courses successfully. It also provides detail on how communities will be encouraged to participate in training events, and the communication channels which will be utilised.

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Meetings prior to delivery of document

Date	Meeting	Attendees
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05/03/07	DT6 conference call	HATII, NANETH, SB
29/03/07	DPE/Planets/CASPAR joint training meeting, Nice	HATII, NANETH, SB

EXECUTIVE SUMMARY

The Planets DT/6 training workpackage aims to provide a dynamic and extendable educational framework that will ensure core communities acquire the necessary knowledge and skills to effectively apply the project's methods, tools and services to their own collections and products. This document outlines a plan for the Planets training programme. It lists the communities and teaching methodologies which have been defined, the learning objectives and content of individual courses, the locations and dates of individual events, and the resources that will be required to deliver the courses successfully. It also provides detail on how communities will be encouraged to participate in training events, and the communication channels which will be utilised: -

Section 1 outlines the aims and objectives of the workpackage as specified in the Description of Work. It also describes key tasks for the workpackage through to month 18 and how the workpackage intends to address these.

Section 2 discusses the methods which have been used by the workpackage to research the training needs of core communities and the training opportunities within the project itself. Key findings that influenced the training programme are also outlined.

Section 3 provides a definition of the communities and audiences the training programme intends to target, and the key training methodologies that will be used, including online training

Section 4 outlines the training programme itself. It describes the overall approach to the programme, the individual training modules identified, scheduled courses and an event charging plan

Section 5 discusses the promotion techniques which may be used in marketing training events and the variety of communication channels the workpackage has at its disposal

Section 6 provides information on the resources that will be required to organise, deliver and evaluate events, plus the various teaching methods that can be applied to individual sessions. It also outlines the quality assurance measures the workpackage intends to put in place to ensure superior course materials are produced

Appendices provide tools for managing the establishment (A1), running (A2), evaluation (A3, A4) and completion (A5) of courses.

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1. Introduction

The Planets project 'will deliver a sustainable framework to enable long-term preservation of digital content, increasing Europe's ability to ensure long-term access to its cultural and scientific heritage'. The training workpackage will contribute to this aim by providing a dynamic and extendable educational framework that will ensure core communities acquire the necessary knowledge and skills to effectively apply the project's methods, tools and services to their own collections and products.

This document outlines a plan for the Planets training programme. It lists the communities and teaching methodologies which have been defined, the learning objectives and content of individual courses, the locations and dates of individual events, and the resources that will be required to deliver the courses successfully. It also provides detail on how communities will be encouraged to participate in training events, and the communication channels which will be utilised.

1.1 Aims and objectives of the training programme

The Planets Description of Work stipulates that the overriding objective for the Planets training is to ensure widespread adoption and use of Planets methods and technologies by practitioners, researchers and vendors. This is divided into a number of more specific objectives: -

1) *Provide a conduit between the innovations of the project, their subsequent exploitation, and user communities, to maximise take-up of Planets methods, products and services*
   The Planets training programme occupies and unique and pivotal position within the project. There is a responsibility to the other partners and workpackages within the project to devise a training programme which provides quality knowledge and skills on the key outputs and innovations of the project. There is also a responsibility to provide an innovative and extendable training programme to key user communities, in order to allow them to maximise their use of Planets methods, products and services. The programme therefore needs to meet the needs of both these groups, and as such will be a visible and public face of the project.

2) *Offer training opportunities to staff in archives, libraries, data archives and universities to promote the take-up of Planets methods, practices products, services and technologies*
   The workpackage will design a programme which supports the needs of the European national library and archive community, groups which are the primary focus of the project. However, courses need to be structured in such a way that they also provide the opportunity for knowledge and skills development in other institutions and communities with a responsibility for society's scientific and cultural heritage. This will help to support the project's hope that the knowledge generated "will have a much broader applicability for other types of organisations with preservation requirements".

3) *Provide capability building training for consultancies, SME technology developers, and vendors*
   The training programme will be used to train not only staff within organisations responsible for preserving society's scientific and cultural heritage, but also groups who will be key in ensuring Planets tools are integrated into other software. This requires a different level of training which is responsive to the needs of these particular audiences.

4) *Provide certification for those trained to validate their use of planning tools, templates, construction of new testbeds, and content characterisation*
   It is hoped that the workpackage can provide a training programme which is structured in such a way to allow for accreditation of individuals who have attended or completed a series of modules.

In order to achieve these objectives the workpackage will identify an approach to each course area that is: -

- Responsive to the learning and teaching needs of the particular group being trained
- Offered in the most appropriate training environment
- Most effective in the methods it uses
- Matched in the level of detail and intensity to the ways in which the participants are likely to use the knowledge and skills acquired during the training

1.2 Target groups and types of training

The Description of Work identifies five key audiences for training, each of which can tap into different aspects of the Planets product set: -

- Practitioners
- Bespoke developers
- Vendors
- Researchers
- Training professionals

A variety of training methods are also outlined, based on the knowledge that some audiences respond better to particular learning and teaching methods than others: -

- Online tutorials
- Large group classroom teaching
- Hands-on small group training

1.3 Tasks

The first 18 months of the workpackage is divided into three key tasks, with an initial definition of training needs to be identified before tasks begin. The tasks are: -

- DT6.1 - Training Plan: This document will define the courses that Planets will run, the different learning and teaching methodologies which will be adopted to ensure courses achieve their learning outcomes, and provide a schedule of course delivery locations, dates and timings.
- DT/6.2 - Training Development: This task will design the Planets training modules, agree a training methodology, and prepare templates and online materials to support delivery of the courses.
- DT/6.3 - Training Delivery and Assessment: This task will deliver the first two training courses, award certificates to those who successfully complete the training, and measure the effectiveness of the courses.

An early output by the workpackage was a detailed workplan for how these early tasks would be addressed, including partner work allocation. A copy of this document can be found in appendix A6. The workpackage have since produced a similar document covering months 13-30 and effort allocation for the remainder of the project, which can be found in appendix A7.

2. Training needs and opportunities

In order to develop a training programme which is responsive to the needs of core communities and which optimises the opportunities Planets outputs have to offer, the Description of Work specifies the need for a review of training needs and opportunities. The workpackage has addressed this issue through the following initiatives.

2.1 Training questionnaire

A training questionnaire was sent out to all subproject and workpackage leaders in order to identify the key outputs of the project, the different audiences and what they may require training on, and the levels of pre-knowledge required. The key findings, which influenced the final course programme, were as follows: -

- Planets partners outlined which areas of their subproject/workpackage needed to be covered in the training programme, and the earliest date from when training on these topics would be feasible
- Several partners specified the need for a number of general, high level courses to inform communities about the key areas of digital preservation
- The majority of partners felt that Planets experts should deliver training courses on project outputs, due to the level of background and technical knowledge required. Training professionals may be suitable for more high level courses, or at later stages in the project, but they would need to have sufficient background knowledge to deliver the courses correctly
- The questionnaire should be run at a later date to validate the initial responses and ensure the most efficient course structure was still in place

2.2 Work with other EU projects to identify training needs

The Planets training workpackage realises that to deliver the number and level of courses that it would like co-operation with other projects will be essential. As an FP6 EU project Planets has an obligation to work with other projects in this group, such as DPE and CASPAR, and training is a key aspect of the projects where collaboration can be beneficial. Planets will be working with these groups to identify collaborative training opportunities, and one of the first steps is to learn about current community needs and capabilities. This will allow the projects to identify the knowledge requirements of their core user communities, and to distinguish areas where digital preservation courses should be delivered.

A joint training needs questionnaire, developed by Planets, DPE, CASPAR, DCC and other digital preservation projects, is currently in preparation and will be issued to user communities of each project. The workpackage will use this questionnaire to approach its own potential user communities, in order to establish their training needs and requirements. When the training plan was prepared this document had not yet been distributed, but the eventual responses will be used to further validate the training programme and make any necessary alterations.

The background knowledge generated from these activities has allowed the workpackage to define its audiences, course areas and teaching methods, and to outline a training programme which is responsive to the needs and requirements of both Planets and its potential user communities.

3. Audiences and training methodologies

Through consideration of the overall project aims, the details proposed in the Description of Work and the activities outlined in section two, the Planets training workpackage have identified the core communities who would benefit from training on Planets methods, tools and services. Within these communities key audiences and the teaching methods which would be most effective in developing the knowledge and skills of these audiences have been defined.

3.1 Definition of communities and audiences who will be targeted for training

In keeping with the project's primary objectives, the communities initially targeted for training will be European national libraries and archives. However, it is our intention to also extend the opportunities for learning about Planets and its services to other institutions that have a responsibility for Europe's cultural and scientific heritage. These will include smaller and more diverse institutions within the ALM (Archives, Libraries and Museums) sector, such as university libraries and archives, but also potentially other types of sectors and institutions such as data centres, government and business.

Within these institutions and sectors, we will target the following audiences: -

Practitioners – these will be staff working within (primarily MLA) institutions, such as librarians and archivists, plus staff in data centres working to a similar level of responsibility. The group as a whole would benefit from courses covering general issues of digital preservation, but in regards to Planets will also require direct training on how to create and execute preservation plans. Some prior technical knowledge will be required to understand the techniques used in the latter courses, therefore it is envisaged that the key individuals participating will be digital archivists, those working with institutional repositories, or other similar roles.

Researchers – these will potentially be research groups within library, archive, communication and computer sciences, who are directly involved in digital preservation issues. As these groups will require a sound knowledge of Planets but not necessarily expertise in using the technologies, it is envisaged that the online training tools will be the primary source of training for this group.

Vendors – this group will include vendors of digital library products, repository software products, and content delivery systems. The training programme will need to provide general awareness of Planets tools and services, but also a degree of knowledge that allows vendors to potentially integrate the project's services into their products. Due to the commercial and technical nature of this group it is envisaged that online training will be the key method used to reach these groups, though the programme will still attempt to attract individuals to more technical face-to-face courses.

Developers – this group will include those employed by commercial vendors, but also institutional IT experts within the MLA, government and business sectors, who would be responsible for implementing the Planets framework. This group will be a primary target audience for tools training courses, which will provide them with the in-depth knowledge and skills required to effectively apply the framework. Effective online tutorials will also be a key secondary training method for this group.

3.2 Training methodologies

The Planets programme will use a variety of teaching methods to ensure attendees gain maximum benefits from each training course. It has already been acknowledged in this chapter that different audiences will suit different styles of teaching, so this has been taken into consideration when identifying teaching methods for individual modules.

3.2.1 Face-to-face training

Course modules will use two different types of face-to-face training: -

Large group training – this will be a mixture of lectures and practical exercises, or break-out groups. Large group training offers wider distributed market potential due to the number of places available, but in allowing this the method becomes less suitable for detailed practical courses. It is therefore envisaged that this approach will be used primarily for the more general and practitioner-level courses.

Small hands-on group training – this type of training will be primarily suited to more technical courses, which require a higher concentration of practical activities and thus benefit from a smaller number of participants. This will be the key training method used for Planets tools modules due to their technical nature. This type of training can be broken down into further subcategories: -

- Hands-on tutorials – structured practical exercises working alongside the tutor
- Case-based activities – learning about a method or tool by applying aspects to a specific scenario
- Learning by assistant application of technologies – actively applying the technologies which have been taught during the course itself, often to own datasets

3.2.2 Online training

The workpackage will use online tutorials, provided through a course management system, as a training method for particular topics and as a support tool for the face-to-face courses. This will allow the workpackage to provide a sustainable knowledge and skills development package capable of reaching beyond the training events provided by the project. The online tutorial tool will also be a key method to encourage take-up of products with vendors. Opinions from Planets partners who have extensive knowledge in this field have suggested that online, self-directed training is often a more suitable method for vendors, and the one most likely to ensure participation. The tools courses will therefore be supported by strong online tutorials, offering an alternative for those unable to attend events.

A Virtual Learning Environment (VLE) or Course Management System (CMS) is a software system designed to support tutors in online learning. A variety of systems are available, but the project has decided to adopt the Moodle software package[1]. Moodle is a free, Open Source course management system, with 23,633 registered sites worldwide. Since its creation in 1999 the system has been adopted by a wide variety of institutions, including higher and further education. One of the most recent adopters of Moodle is the Open University, who are using the software as the foundation of their new online student learning environment which will be used by 180,000 students. For the purpose of this project studies have also been reviewed which compared Moodle to both commercial alternatives and other OpenSource systems.[2] In both cases Moodle proved to deliver superior communication tools and provided a level of usability for both students and tutors unmatched by the other systems available. These demonstrate the superiority of Moodle and its suitability for use as the Planets training platform.

Moodle offers a variety of features which aid the e-learning process. Individual course areas can be set up with varying degrees of access, offering the possibility to distinguish between post-event support documentation and publicly accessible complete tutorials. Some of the activity modules which may prove particularly useful to the Planets training programme include: -

[1] Moodle http://www.moodle.org/

[2] Reports viewed were Munoz, Kathy D and Van Duzer, Joan. *Blackboard versus Moodle: a comparison of satisfaction with online teaching and learning tools* http://www.humboldt.edu/~jdv1/moodle/all.htm and Graf, Sabine and List, Beate. *An evaluation of Open Source e-learning platforms stressing adaptation issues* *http://www.wit.at/people/list/publications/icalt2005.pdf*

Glossary – this allows a list of definitions to be created, providing assistance in any unique or technical terms used in tutorials and documentation. Tutors can also automatically create links to the glossary entries throughout their course

Forums – these offer an opportunity for course participants to communicate with each other on a variety of issues arising from the training they have received, as well as tutors offering explanations where necessary. The forum facilities include peer rating of postings, and the opportunity for tutors to limit forums to certain groups, ideal for initiating discussion just between attendees of a specific course.

Quizzes – these allow tutors to develop a variety of questions types for students. This format could be particularly useful for reaffirming knowledge gained during a face-to-face event or through a detailed online tutorial.

Lessons – these deliver course content in a number of flexible ways. Individual pages are developed with questions and choices that allow students to navigate the lesson and develop their knowledge and skills. This module can be used as a basis for developing online tutorials reliant on self-directed learning.

Surveys – this module allows tutors to gather feedback from students and collate results. This could be an additional mechanism used in the course evaluation process.

The modules will be of value for offering both support to the face-to-face training courses and also more complete online tutorials. The system therefore has the capabilities to provide a structured e-learning environment which can deliver training beyond the life of the project itself.

The partners in the PLANETS training workpackage are well placed to optimise use of the Moodle system. HATII at the University of Glasgow was an early adopter of the system and has been actively using the software for several years. As a result the workpackage has readily available access to an extremely knowledgeable Moodle team. The institution also has the capacity and capability to effectively run an instance of Moodle. Overall the workpackage therefore has the expertise to effectively use the Moodle software and utilise the benefits it has to offer.

4. Training programme

This section outlines the planned Planets training programme, detailing individual modules, courses, dates and locations.

4.1 Definitions

4.1.1 Programme structure

The programme has been designed to follow a modular structure. These modules will be self-contained units, the majority of which can be delivered either separately or in combination with other modules. This provides a more flexible structure and the opportunity for subject-specific modules to be delivered as part of larger conferences or collaborative events. The workpackage have still outlined a number of courses that it intends to deliver at certain periods using varying combinations of the modules. The timeframe of these courses will allow the training to unfold as methods and tools within the project are finalised, and will help to avoid early courses which lack content and provide training on incomplete tools and products. It will also enable participants to work through the preservation planning process in a chronological order that will avoid gaps in knowledge gained.

The courses provided on Planets outputs will be split into two distinct levels/areas. The first of these will be centred on the process which practitioners need to go through in order to effectively preserve a digital collection using the Planets framework. The second area will cover in detail the technical tools and services behind this process, in order to educate institutional IT experts, developers and potentially vendors.

4.1.2 Locations

The Planets training programme will aim to encompass as many EU member states as possible. However, it recognises that in order to deliver an optimum number of courses it must make the best use of the resources it has at its disposal. The course programme therefore follows the system of locating each first delivery within a partner institution/city, and then running a second delivery in a non-partner country. The workpackage also wishes to investigate the possibility of co-locating Planets training with other significant EU events and training opportunities. The locations provided are therefore tentative and open to alteration should an opportunity arise that provides a greater possibility for take-up and dissemination of project outputs. This approach will be applied primarily to shorter courses which can more easily be combined with larger events.

4.1.3 Number of courses

The Description of Work specifies that DT/6 is to deliver a total of 22 courses throughout the duration of the project. The workpackage feels that in order to ensure the highest take-up of the project's outputs an approach needs to be adopted which is far more community-driven, and focused on reaching other institutions within the digital preservation community who would benefit from the tools and services Planets is developing. The market for training courses in digital preservation is still relatively small, with most institutions having limited funds and effort available to attend a large number of individual courses. The workpackage has therefore proposed a course structure with initially ten events, a number which it feels will be much more appropriate to the needs of the community. This concentrated number of courses allows for more focus and devoted partner effort on each individual course, therefore providing a superior quality of preparation, delivery and ultimately education of participants.

The workpackage will also be assisting in the delivery of courses through its work with other projects. Planets is committed to collaboration with other EU projects such as DPE and CASPAR in order to deliver high quality training. By concentrating resources into a smaller number of project-specific

courses the workpackage is able to offer support, partner effort and training opportunities within joint events, thus enabling knowledge of the project's outputs to reach a far wider audience than was initially anticipated in the Description of Work.

The reduced number of face-to-face courses also allows for an extended amount of workpackage effort to be dedicated to the development of online training. The significance of online training and its benefit to the workpackage and project as a whole has already been discussed in section 3.2.2. By concentrating additional effort in this area the workpackage will be able to provide a complete package potentially capable of reaching a far larger audience than face-to-face events alone, and a form of learning which is far more sustainable than a finite number of organised events. The workpackage believes that brought together this structure will be offering a much stronger and effective combination of teaching methods than could ever have been delivered using the original specifications.

4.2 Modules

The workpackage have identified a number of modules which will be used as the basis of any training courses delivered. These modules have the potential to be combined with other modules for either Planets-specific courses (as outlined in the following section) or for shorter courses as part of conferences and collaborative training initiatives.

Module title: Digital Preservation and the Planets Approach	Number: Planets-1
Duration: ½ day	
Learning objectives: This module will introduce participants to the area of digital preservation, what Planets aims to deliver, how the process works, and its various benefits.	
Content: - The approach to digital preservation - Aims of the Planets project - The benefits of adopting the Planets framework - Costs aspects	
Target audiences: Middle and senior management, decision makers, practitioners	
Teaching methods: Lectures	
Dependencies: None	

Module title: The Preservation Planning Process	Number: Planets-2
Duration: ½ day	
Learning objectives: This module will introduce participants to the preservation planning process, placing it in the context digital preservation and providing an introduction to the process developed by Planets. It will offer a concise and self-contained introduction which can then be combined with more detailed modules, or potentially used alongside other introductory modules during collaborative events.	
Content: - The preservation planning process - Benefits to overall digital preservation strategies - The Planets approach - Overview of key components	
Target audience: Decision makers, practitioners (as an introductory module to a more detailed preservation planning course)	
Teaching methods: Lectures	
Dependencies: None	

Module title: Identifying essential characteristics of digital objects (objective trees)	Number: Planets-3
Duration: 1 day	
Learning objectives: This module will provide participants with an understanding of the 'utility analysis' methodology within the framework of preservation planning and within different business contexts. It will also allow hands-on experience in building objective trees and what is needed to build them.	
Content: - Understanding how to identify criteria for essential characteristics of digital objects - Understanding of the Preservation Planning methodology - Developing objective trees for different types of objects	
Target audience: Practitioners	
Teaching methods: Lectures plus practical exercises in building objective trees	
Dependencies: None	

Module title: Building a preservation plan using the Planets approach	Number: Planets-4
Duration: 1 day	
Learning objectives: This module will provide participants with an understanding of the preservation planning process and the different parameters that are relevant in certain business contexts. It will also provide attendees with the skills necessary to develop a preservation plan.	
Content: - Identifying and analysing relevant factors that will influence preservation criteria (e.g. organisational/ societal requirements, collection profile, usage criteria) - Planets preservation planning decision support tool (Plato) - Building plans using (usage and policy) models - Understand the different components of a preservation plan - Proactive preservation planning module	
Target audience: Practitioners	
Teaching methods: Lectures plus practical exercises in developing preservation plans	
Dependencies: Attendees must have already completed module 3	

Module title: Preservation Planning decision support tool (Plato)	Number: Planets-5
Duration: 1/2 day	
Learning objectives: This module will provide participants with technical knowledge of the decision support tool and allow them to understand its purpose and potential usage	
Content: - Introduction to purpose of tool (including demonstration) - Technical explanation	
Target audience: Developers, vendors	
Teaching methods: Lecture plus demonstration	
Dependencies: None	

Module title: Preservation approaches	Number: Planets-6
Duration: ½ day	
Learning objectives:	

This module will provide background on the main preservation approach alternatives and tools, along with an overview on the role Planets is playing. It will offer a concise and self-contained introduction which can then be combined with more detailed modules, or potentially used alongside other introductory modules during collaborative events.
Content: - Preservation approaches - How Planets tools will assist in evaluating preservation approaches
Target audience: Decision makers and practitioners
Teaching methods: Lectures
Dependencies: None

Module title: PLANETS Registries	Number: Planets-7
Duration: ½ day	
Learning objectives: This module will provide knowledge of the Characterisation, Preservation Action and Preservation Planning registries and the way these can help participants to assess their preservation plan options	
Content: - general introduction to registries and their role - Introduction to characterisation registry - Introduction to preservation action registry - Introduction to preservation planning registry - The use of registries in the preservation process	
Target audience: Practitioners as part of the preservation planning process. IT experts, developers and vendors as part of course on PLANETS toolsets	
Teaching methods: Lectures	
Dependencies: Should be provided in conjunction with module 6	

Module title: Preservation Action Toolset	Number: Planets-8
Duration: 1 day	
Learning objectives: This module will provide an understanding of what tools are available for migration and emulation and how they can be accessed and used.	
Content: - Introduction and explanation about technical characteristics of the different tools - Understanding of how to apply the different tools (their strengths and weaknesses) - How to use them - Access to PA tool registry	
Target audience: IT experts, developers, vendors, preservation staff	
Teaching methods: Lectures plus practical hands-on session	
Dependencies: None	

Module title: Characterisation Framework	Number: Planets-9
Duration: 1 day	
Learning objectives: This module will provide knowledge of the characterisation tools and their potential application	
Content: - Introduction to characterisation tools - How to integrate them with other validation tools / and validation framework? - Effective use of characterisation registry - Understand the (technical) characterisation of digital objects	
Target audience: IT experts, developers, vendors	
Teaching methods: Lectures plus practical hands-on session	
Dependencies: None	

Course title: The testbed environment	Number: Planets-10
Duration: 1 day	
Learning objectives: This module will provide an introduction to the Planets testbed, the way it supports the preservation planning process and its various features. It will offer a concise and self-contained introduction which can then be combined with more detailed modules, or potentially used alongside other introductory modules during collaborative events.	
Content: - A framework for testbeds - The role of testbeds - Features of the Planets testbed	
Target audience: Practitioners as part of the preservation planning process. IT experts, developers and vendors as part of in-depth course on the Planets testbed	
Teaching methods: Lectures	
Dependencies: None	

Module title: Carrying out a testbed experiment	Number: Planets-11
Duration: 2 days	
Learning objectives: This module will follow on from the tesbed overview module by providing hands-on experience in carrying out and interpreting a testbed experiment.	
Content: - Procedure/steps for executing a testbed experiment - Design an experiment - Checklists and templates - Execution of an experiment - Documentation of experiment - Analysis of experiment	
Target audience: Practitioners, IT experts, developers	
Teaching methods: Lectures plus hands-on session for executing experiments	
Dependencies: Should be provided in conjunction with module 10	

Module title: The PLANETS Interoperability Framework/Architecture	Number: Planets-12
Duration: ½ day	
Learning objectives: This module will provide an overview of the interoperability framework and its purpose. It will also assist institutions in the steps they need to take to ensure their specific set of services is included in the framework effectively. It will offer a concise and self-contained introduction which can then be combined with more detailed modules, or potentially used alongside other introductory modules during collaborative events.	
Content: - Introduction to the Interoperability Framework - Explanation of individual components - Identifying toolsets to include - Monitoring tool implementation	
Target audience: IT-managers and IT-developers	
Teaching methods: Lectures plus practical exercises in considering requirements for own institution	
Dependencies: None	

Module title: Installation/configuration of a PLANETS service node	Number: Planets-13
Duration: 1 day	
Learning objectives: This module will outline the knowledge required for the installation, set-up, deployment and configuration of an IF instance	
Content: - Explanation of the components of and requirements for a Planets service node - Installing the PLANETS service node - Configuring the PLANETS service node - Deployment of the service node	
Target audience: IT experts, developers, vendors	
Teaching methods: Small-group hands-on sessions for the set-up and configuration of the Interoperability Framework	
Dependencies: Should be run in conjunction with module 12	

Module title: Wrapping tools as PLANETS Services	Number: Planets-14
Duration: ½ day	
Learning objectives: This module will provide the skills necessary in order to wrap existing or new tools as PLANETS services for use within the PLANETS Interoperability Framework	
Content: - Understand the elements of the wrapper are and the role of the wrapper (reasons) - How to wrap different types of tools and/or services (new or existing): - Characterisation tools - Migration tools - Emulation tools - other services	
Target audience: IT experts, developers	
Teaching methods: Small-group hands-on sessions	
Dependencies: Should be run in conjunction with module 12	

Module title: Creation and integration of external data sources	Number: Planets-15
Duration: 1/2 day (may need to be a full day)	
Learning objectives: This module will provide the skills necessary in order to create, integrate and access external data registries with an institution's own repository within the Planets Interoperability framework.	
Content: - Creation of shared data registries - Manipulation of shared data registries - Integration of shared data registries into own repository	
Target audience: IT experts, developers	
Teaching methods: Small-group hands-on sessions	
Dependencies: Should be run in conjunction with module 12	

4.3 Courses

The modules identified above will offer a flexible approach to the training programme, allowing the workpackage to take advantage of any other events or collaborations to provide training opportunities. Several specific courses however have still been defined which will be delivered at particular points within the project. These are divided into two series: a preservation planning process series for practitioners, and a tools-based course for developers, IT experts and vendors.

4.3.1 The Preservation Planning Process

The aim of these series of courses is to train attendees on the preservation planning process, and the way in which Planets outputs provide a solution. The audience for the training courses will be practitioners within a variety of European institutions:

- National libraries and archives
- Smaller institutions within the ALM sector
- Other organisations responsible for preserving Europe's cultural and scientific heritage e.g. data archives, government

A module run towards the end of the project will be a compilation of the previous courses to train those who were unable to attend the in-depth modules and to raise further awareness of the final Planets outputs.

<table>
<tr><td colspan="2">Course title: The preservation process and identifying essential characteristics of digital objects</td></tr>
<tr><td>Locations and dates: -
- Vilnius (September 2007)
- Vienna (November 2007)</td><td>Duration: 2 days</td></tr>
<tr><td>Projected number of times to be delivered: 2</td><td>Maximum attendees: 20</td></tr>
<tr><td>Responsible partners: TSS, WIEN</td><td>Participating partners: NANETH, HATII, SB, WIEN, TSS</td></tr>
<tr><td colspan="2">Learning objectives:
1. Learn about the digital preservation field and Planets' approach
2. understanding criteria as authenticity, integrity, usability
3. Understand the process of preservation planning
4. Understand the methodology of 'utility analysis' within the framework of preservation planning
5. Get hands-on experience in building objective trees

Modules used:

- Digital Preservation and the Planets Approach (Planets-1)
- The Preservation Planning Process (Planets-2)
- Identifying essential characteristics of digital objects (objective trees) (Planets-3)</td></tr>
<tr><td colspan="2">Teaching methods:
Mixture of lectures and practical activities plus online support</td></tr>
<tr><td colspan="2">Trainers:
Planets experts who are experienced in the use of the PP tool</td></tr>
<tr><td colspan="2">Resources required: Presentations, worksheets, sample digital objects</td></tr>
</table>

<table>
<tr><td colspan="2">Course title: Building preservation plans</td></tr>
<tr><td>Locations and dates: -
- London (Spring 2008)
- Budapest (Spring 2008)</td><td>Duration: 2 days</td></tr>
<tr><td>Projected number of times to be delivered: 2</td><td>Maximum attendees: 20</td></tr>
<tr><td>Responsible partners: TNA, BL</td><td>Participating partners: WIEN, BL, TSS, TNA, HATII</td></tr>
</table>

Learning objectives: 1. Understand alternative preservation approaches 2. Understand the Planets registries and how they assist the preservation planning process 3. Be able to develop preservation plans 4. Understand the different parameters that are relevant in a certain business context for preservation planning *Modules:* - Preservation approaches (Planets-6) - PLANETS Registries (Planets-7) - Building a preservation plan using the Planets approach (Planets-4)
Teaching methods: Mixture of lectures and practical activities plus online support
Trainers: Planets experts who are experienced in the use of the PP tool and Planets registries
Resources required: Presentations, worksheets, access to registries for practical activities

Course title: **Evaluating and selecting preservation plans in a test-bed environment**	
Locations and dates: - - The Hague (Autumn 2008) - Rome (Spring 2009)	*Duration:* 3 days
Projected number of times to be delivered: 2	*Maximum attendees:* 20
Responsible partners: NANETH, UzK	*Participating partners:* BL, ONB, NANETH, UzK, HATII
Learning objectives: 1. Understand the role and use of a test-bed environment 2. Be able to effectively execute a testbed experiment 3. Be able to effectively analyse the results of a testbed experiment in order to identify optimum preservation plan *Modules:* - The testbed environment (Planets-10) - Carrying out a testbed experiment (Planets-11)	
Teaching methods: Mixture of lectures and practical activities plus online support	
Trainers: Planets experts who are experienced in the use of the testbed	
Resources required: Presentations, worksheets, test objects to execute experiments	

Course title: **The process of preservation planning in a distributed environment**	
Locations and dates: - - Copenhagen (Autumn 2009) - Madrid (early 2010)	*Duration:* 5 days
Projected number of times to be delivered: 2	*Maximum attendees:* 20
Responsible partners: KB-DK, BAR	*Participating partners:* KB-NL, NANETH, TNA, KB-DK, BAR, HATII
Learning objectives: 1. Understand the process of preservation planning 2. Understand the different parameters that are relevant in a certain business context for preservation planning 3. Be able to develop, evaluate, and execute preservation plans 4. Understand the distributed environment 5. Understand the role and use of a test-bed environment	

Modules: [a compilation of the previous courses] - Digital Preservation and the Planets Approach (Planets-1) - The Preservation Planning Process (Planets-2) - Identifying essential characteristics of digital objects (Planets-3) - Preservation approaches (Planets-6) - PLANETS Registries (Planets-7) - Building a preservation plan using the Planets approach (Planets-4) - The testbed environment (Planets-10)
Teaching methods: Mixture of lectures and practical activities plus online support from previous modules
Trainers: Planets experts who are knowledgeable about the Planets outputs and how they can be applied
Resources required: Presentations, worksheets and sample data used in previous courses

4.3.2 Area 2: the tools for preservation planning

This course will aim to teach attendees about the Planets tools which are behind the preservation planning process, and the ways these influence the overall framework. The audiences for this module will be:

- System developers
- Software vendors
- Institutional IT experts

The Demonstrator workpackage (DT/8) aims to provide focused demonstration activities to show the range of preservation strategies supported by Planets, and the way technologies can be integrated into digital storage environments. The training workpackage will endeavour to link its tools training programme where possible to these demonstrations, both through joint events and interactive exercises that support the demonstrations themselves. These possibilities will be investigated further after m26, when the Demonstrator workpackage begins.

The course outlined below consists of a number of modules covering key outputs from the project. At this time the workpackage proposes running a five day event where participants can choose to attend individual days or the entire event, based on their own requirements. This provides a higher degree of flexibility and will be particularly appropriate for vendors who may only be interested in one specific tool. In order to cater for the potentially large number of individuals who will be unable to attend the two events this module will also be fully supported by the course management tool, with detailed online tutorials.

Course title: **The tools for preservation planning**	
Locations and dates: - - Glasgow (Spring 2009) - Prague (Autumn 2009)	*Duration:* 5 days
Projected number of times to be delivered: 2	*Maximum attendees:* 15
Responsible partners: HATII, ARC	*Participating partners:* ONB, ALUF, IBM, ARC, HATII
Learning objectives: 1. Understand the purpose and potential usage of the decision support tool 2. Understand what tools are available for migration and emulation and how they can be accessed and used 3. Understand the characterisation tools and their potential application 4. Understand the application of the IF	

Modules: - Preservation Planning decision support tool (Planets-5) - Preservation Action Toolset (Planets-8) - Characterisation Framework (Planets-9) - The Planets Interoperability Framework/Architecture (Planets-12) - Installation/configuration of a Planets service node (Planets-13) - Wrapping tools as PLANETS Services (Planets-14) - Creation and integration of external data sources (Planets-15)
Teaching methods: Mixture of lectures and practical activities with the main focus on hands-on group training. Online support and detailed tutorials will also be provided.
Trainers: Planets experts from each subproject listed who are knowledgeable about the Planets tools and how they can be applied
Resources required: Worksheets, sample data, demonstrators (in collaboration with the Demonstrator workpackage)

4.4 Online tutorials

The benefits of e-learning and Moodle in particular have already been discussed in a previous section. Planets will use the wide variety of features available to both aid the face-to-face training and provide self-contained tutorials. The course management software will initially be used to support the face-to-face training provided by Planets. The training platform will not include direct support such as a helpdesk, but it will supply tools that assist course participants in re-emphasising the knowledge and skills developed during training events. It will do this by using a number of the facilities provided by Moodle. The exact features which will be used may vary depending on the learning objectives and content of the individual course, but the workpackage forsees the following being the key tools: -

- Forums – these will be developed for participants to discuss issues which arose from the course and allow for the sharing thoughts and questions about the skills they have acquired and the tools they have worked with
- Interactive questions and exercises – these will consolidate the key learning points of the courses and can be used by participants to reaffirm what they have learnt during the face-to-face training
- Course documentation – any supporting material which was provided at the course will be provided online for access by course attendees
- Glossaries – these can be used to verify key terms used in the training. The workpackage would hope to take advantage of the Planets glossary already being developed within the project, and base definitions on the information already available

In later stages of the programme, as the Planets methods and tools are finalised, the course content system will be developed to ensure that a structured online training programme is provided. This programme will be a lasting legacy to the workpackage and indeed to the project as a whole, so will be required to be self-regulatory and able to operate independently of constant input from the Planets partners. The details of this programme will be finalised during a later phase of the project, but at this stage the workpackage forsees the following features playing a key role in the package: -

- Lessons – these allow tutors to provide complete tutorials with questions which can automatically be graded. These self-contained modules will allow tutorials on key tools and methods in Planets to be accessed both during and after the project, and requiring no intervention from project partners.
- Glossaries – again these can be used to offer definitions of the terms used in the lessons, a useful feature for self-directed learning

4.5 General courses

Planets will be working with other EU projects such as DPE and CASPAR to support a series of courses that will train individuals in more general issues related to digital preservation. Before other training programmes are finalised or further collaboration has taken place a list of final courses cannot be provided, but the following list of topics are some of the areas which relate to Planets outputs and which the workpackage would like to see addressed: -

- justification for digital preservation/funding issues
- digital preservation policies
- trustworthiness of digital repositories/certification
- Risk management
- Legal issues
- Preservation approaches
- OAIS

4.6 Course Fees

The Planets training workpackage aims to provide a series of courses which will develop the knowledge and skills of core communities, promote the importance of digital preservation and educate in the ways that Planets methods and tools can help to resolve these issues. The programme does not aim to make a financial profit through following this responsibility. However, the workpackage recognises that to cover nominal costs and to ensure attendance from those registered for the event, a small charge for courses will be necessary. The workpackage has also based this approach on experiences reported by the ERPANET and BRICKS training programmes, where partners found a reasonable charge was key in ensuring buy-in to individual events. The following is a proposed list of fees based on covering the resources which will be required to supplement a training event. A rolling discount strategy is proposed for firstly Planets partner institutions, and secondly other associated digital preservation projects such as DPE and CASPAR who will be working closely with Planets and will assist in collaborative initiatives. The final course fees for external participants total approximately 50 percent over the resource and catering costs, to cover catering expenses of lecturers and to take into account the discount strategy.

Two day courses
Course start: 10:00 day one
Course end: 16:00 day two

Resources covered:	Coffee @ €5 (x4)
(per person)	Lunch @ €30 (x2)
	Dinner @ €50 (x1)
	Course handouts and badges @ €25
	Room hire @ €30 (per day)
	Miscellaneous @ €15
	TOTAL: €230

Course price (individuals located in partner institutions): €230
Course price (other associated projects) €270
Course price (external participants): €340

Three day courses
Course start: 10:00 day one
Course end: 16:00 day three

Resources covered:	Coffee @ €5 (x6)

(per person) Lunch @ €30 (x3)
Dinner @ €50 (x2)
Course handouts and badges @ €25
Room hire @ €30 (per day)
Miscellaneous @ €15
TOTAL: €350

Course price (individuals located in partner institutions): €350
Course price (other associated projects): €420
Course price (external participants): €520

Five day courses

Course start: 10:00 day one
Course end: 16:00 day five

Resources covered: Coffee @ €5 (x10)
(per person) Lunch @ €30 (x5)
Dinner @ €50 (x2)
Drinks @ €10 (x1)
Course handouts and badges @ €25
Room hire @ €30 (per day)
Miscellaneous @ €15
TOTAL: €500

Course price (individuals located in partner institutions): €500
Course price (other associated projects): €600
Course price (external participants): €750

5. Promotion of events/encouraging take-up

The following section describes how Planets will promote training events and encourage take-up of its results. This is not a traditional communication plan, but should be seen as a collection of ideas on how to approach the task. Once the actual courses have been finalised and are ready to be promoted, the partners will be able to use the following as a list of suggestions from which to choose.

5.1 Promotion techniques

In order to make the best possible use of the time allocated to the work package, it is proposed that the work package takes the following into consideration:

- Make use of already existing/planned dissemination activities in other Planets work packages (in particular DT work packages) – such as conferences, workshops, seminars, articles, presentations, vendor and supplier meetings

In order to promote Planets training events a necessary and rational approach is to make use of traditional marketing communication channels in already existing initiatives in the digital preservation field:

- Announcements in various newsletters, magazines, online event calendars and on weblogs maintained by relevant professionals

However, the work package can not rely solely on others for promotion of events and will therefore have to undertake activities such as the following:

- Send direct and targeted invitations (regular mail or email) to professionals at national archives and libraries in Europe
- Design dissemination material promoting Planets training – for example a general flyer or brochure that will encourage potential attendees and/or users to visit the Planets web site for more information on actual events and online tutorials

The partners in the work package will evaluate the effect of the promotional activities after each event and make any necessary adjustments needed in connection with the announcements of future events.

5.2 Communication channels

The following is a list of some of the communication channels which can be used to promote Planets training events and encourage take-up of results. The list does not include relevant international and national conferences.

- **Centres and online event calendars**
  Planets - http://www.planets-project.eu/events/
  DPE - http://www.digitalpreservationeurope.eu/events/
  CASPAR - http://www.casparpreserves.eu/events/events_list
  Digital Curation Centre - www.dcc.ac.uk/events/events_nondcc
  Digital Preservation Coalition - http://www.dpconline.org/graphics/diary/
  European Preservation Information Center - www.knaw.nl/ecpa/calendar.html
  ABM-UTVIKLING - www.abm-utvikling.no/kursogkonferanser/index.html

- **Discussion groups/forums**
  DCC – Digital Curation Centre - www.dcc.ac.uk/forum

- **Discussion lists**
  ARSC Recorded Sound Discussion List – palimpsest.stanford.edu/byform/mailing-lists/arsclist/
  DIGIPRES - lists.ala.org/wws/info/digipres
  EPIC-LST - www.knaw.nl/ecpa/activities.html
  RLG-PRESERVATION - lists2.rlg.org/cgi-bin/lyris.pl?enter=rlg-preservation
  PADI-FORUM – news and discussion - www.nla.gov.au/padi/forum/index.html
  TAPE@NIC.SURFNET.NL - https://listserv.surfnet.nl/archives/tape.html
  AMIA-L - www.amianet.org/amial/archive.html
  DIGLIB – (IFLA-related) - infoserv.inist.fr/wwsympa.fcgi/subrequest/diglib
  SCAVM-L – (IFLA-related) - infoserv.inist.fr/wwsympa.fcgi/info/scavm-l

- **Magazines & Journals**
  Computers in Libraries - www.infotoday.com/cilmag/default.shtml
  D-Lib Magazine - www.dlib.org
  IFLA Journal - www.ifla.org/V/iflaj/index.htm
  IASA Information Bulletin - www.iasa-web.org/iasa0011.htm
  IASA Journal - www.iasa-web.org/iasa0065.htm
  International Journal of Digital Curation - www.ijdc.net/./ijdc/issue/current
  ONLINE (The leading magazine for information professionals) - www.infotoday.com/online/default.shtml
  RLG DigiNews – (Announcements section) - www.rlg.org/en/page.php?Page_ID=12081

- **Mailing lists**
  Planets (internal) – all@planets-project.eu
  DPE (internal) – dpe-all@gla.ac.uk
  CASPAR – caspar@jiscmail.ac.uk
  digital-preservation **-** Digital-preservation@jiscmail.ac.uk
  MLA News Ebulletin - www.jiscmail.ac.uk/lists/mlanews.html
  Repositories - repostitories@jiscmail.org

- **Networks *(relevant for reaching small and medium-sized ALMs nationally)***
  Associates Network (with Digital Curation Centre) - www.dcc.ac.uk/associates
  Lokalhistorisk Netværk (Network of ALMs) - www.lokalhistorisknet.dk

- **RSS Feeds**
  Digital Curation Centre - www.dcc.ac.uk/rsslist

- **Summaries**
  DPC/PADI What's new in digital preservation - www.dpconline.org/graphics/whatsnew/

- **Weblogs**

  Digitizationblog – News on digitization in libraries and allied institutions
  digitizationblog focuses on digitization and related activities (such as electonic publishing) in libraries, archives, and museums, and is intended to be a source of news relevant to people who manage and implement digitization projects.
  digitizationblog.interoperating.info/?page_id=149

  Digitization 101
  This blog is the creation of Hurst Associates, Ltd. (www.HurstAssociates.com) and is THE PLACE for staying up-to-date on issues, topics, and lessons learned surrounding the creation, management, marketing and preservation of digital assets. (A few other topics are covered when the mood hits!)
  hurstassociates.blogspot.com

Digitize everything
Digitize Everything is a blog about digitization of all types by Michael Yunkin, Web Content/Metadata Manager at the University of Nevada, Las Vegas (UNLV) Libraries.
www.digiwik.org/digitize-everything

DAVA – Digital Audiovisual Archiving
A blog focused on the digital transformation and preservation of audiovisual material
av-archive.blogspot.com

File Formats Blog
News and comments about technical issues relating to file formats, file validation, and archival software
fileformats.blogspot.com

The Ten Thousand Year Blog
“David Mattison - he describes his blog as “thoughts about and pointers to the world of digital preservation, digital libraries, e-learning, science, and history by an archivist.” In addition to providing links to news and resources, the site provides commentary on current trends in online information preservation and management. “
www.davidmattison.ca/wordpress

6. Course design

This section will outline some of the resources the workpackage will be required to produce in order to support the preparation, delivery and evaluation of training courses. It outlines the variety of training methodologies the workpackage will consider, the course materials which will be needed for each course, the evaluation mechanisms which will be put in place, and what steps will be taken to ensure quality assurance of the training materials produced. The next phase of the workpackage, task DT/6.2, will concentrate on developing these initial plans into a sophisticated and coherent package, but for the purpose of this document primary ideas and templates are provided.

6.1 Course Organisation and Preparation

Each Planets course will require supporting materials that enable thorough organisation and preparation for an event. The following are templates identified by the workpackage as being essential, though by no means definitive, for efficient organisation: -

Course initiation form – this form will allow the workpackage to describe the exact structure of the course and the effort and resources that will be required. The form will be completed prior to any formal announcement of an event to ensure a clear image of the course, and three members of the workpackage will always view the document for approval, to ensure quality assurance. A template for this form can be found in appendix A1.

Course checklist – this form will provide a detailed list of activities which may need to occur in order to ensure an event is organised correctly. It includes areas such as logistics, speaker preparation, promotion of event and event materials. The list will aim to provide a level of detail which ensures any partner preparing for an event is aware of all the activities necessary to guarantee a high level of organisation. It also contains a list of the organisational elements which should be considered during and immediately after an event. An initial checklist template, based on a model developed by the DCC, can be found in appendix A2.

Pre-course questionnaire – a questionnaire for participants prior to an event will be necessary to ensure that the course level is appropriate, and in certain instances so that the event can be tailored towards the needs of its attendees. The form will be provided online for easy completion and compilation of results, and will be based on questionnaires produced in other projects such as the DCC, whilst at the same time allowing a level of granularity efficient for identifying knowledge requirements for a particular course.

6.2 Course delivery

There will be a variety of teaching methods and documentation required for efficient delivery of the event itself. The main aim of the training development task is to develop these methodologies and templates in order to ensure a high quality of training and supporting materials. The workpackage can however outline its primary considerations for the purpose of this document, which will then be designed and developed during the DT/6.2 task.

6.2.1 Teaching Methods

In order to plan the appropriate form of training methodology it is important to understand the pros and cons for the different methods as well as to perceive the appropriate form for the designated target audience. A practitioner audience for example may be receptive to quite different learning techniques from those of a vendor audience. Each partner delivering a session will need to consider the various teaching methods carefully in order to guarantee the most appropriate approach has been taken.

In planning a lecture or exercise a tutor will need to know if the students expect to get a general theoretic understanding or if they want to learn a task. In the latter case extended exercises may need to be planned, whereas in the first overview lectures followed by discussions might be the best method.

In designing the course it is necessary to consider what the audience expects and how they learn. If a week-long course is offered generally it will be necessary to offer a variety of different learning methods, such as parallel sessions or break out sessions.

In designing each course one might use different learning methods. The list below is inspired by a list from: http://www.adprima.com/teachmeth.htm, and will be used by the workpackage as the basis for directing course tutors to the most efficient teaching method for their particular topic area and audience.

Teaching method	Description	Advantages	Disadvantages	Preparation
Cooperative learning	Seminars, where students take turn in being responsible for the lecture or exercise. Works well for graduate students and could be used in connection with e.g. distance education. Requires time for students to prepare and is therefore not appropriate for e.g. two day courses.	Helps foster mutual responsibility. Supported by research as an effective technique. Students learn to be patient, less critical and more compassionate.	Some students don't work well this way. Loners find it hard to share answers. Aggressive students try to take over. Bright students tend to act superior.	Decide what skills or knowledge are to be learned. Need to identify relevant material (e.g. a set of articles) Requires some time to prepare students.
Lecture	One person provides an overview. Basically two kinds of lectures, one where the students beforehand have studied the material, which is more putting into context, the other, where the material is new and the lecture is motivational.	Factual material is presented in a direct, logical manner. May provide experiences that inspire - useful for large groups.	Proficient oral skills are necessary. Audience is often passive. Learning is difficult to gauge. Communication is one-way.	There should be a clear introduction and summary. Effectiveness related to time and scope of content. Is always audience specific; often includes examples, anecdotes.

Lecture with discussion	As above, but now more interactive. Is best if the students are prepared or if one can draw on their past experience.	Involves students, at least after the lecture. Students can question, clarify and challenge. Lecture can be interspersed with discussion.	Time constraints may affect discussion opportunities. Effectiveness is connected to appropriate questions and discussion; often requires teacher to "shift gears" quickly.	Teacher should be prepared to allow questions during lecture, as appropriate. Teacher should also anticipate difficult questions and prepare appropriate responses in advance.
Panel of Experts	A number of experts can give their different opinions on a give subject. Might be a good way to introduce diversity into especially more mature students perception of a subject. Might be a good starting point for discussions, exercises or brainstorming sessions.	Experts present different opinions. Can provoke better discussion than a one person discussion. Frequent change of speaker keeps attention from lagging.	Personalities may overshadow content. Experts are often not effective speakers. Subject may not be in logical order. Logistics can be troublesome.	Teacher coordinates focus of panel, introduces and summarizes. Teacher briefs panel.
Brainstorming	Students are encouraged to come with ideas – it can either be trait related directly to the issue or one might use associating methods, where the issue is addressed based on different associations.	Listening exercise that allows creative thinking for new ideas. Encourages full participation because all ideas are equally recorded. Draws on group's knowledge and experience. Spirit of cooperation is created. One idea can spark off other ideas.	Can be unfocused. Needs to be limited to 5 - 7 minutes per session Students may have difficulty getting away from known reality. If not managed well, criticism and negative evaluation may occur. Value to students depends in part on their maturity level.	Teacher selects issue. Teacher must be ready to intervene when the process is hopelessly bogged down.
Video/Slides	Start with a relevant video or slideshow – to get visual inspiration to the following discussion or lecture	Entertaining way of introducing content and raising issues Usually keeps group's attention Looks professional Stimulates discussion	Can raise too many issues to have a focused discussion Discussion may not have full participation Most effective when following discussion	Need to obtain and set up equipment Effective only if teacher prepares for discussion after the presentation
Discussion	Organised discussion around topics – in	Pools ideas and experiences from group	Not practical with more that 20 students	Requires careful planning by teacher to guide

	contract to ad hoc discussion e.g. during lectures.	Effective after a presentation, film or experience that needs to be analyzed Allows everyone to participate in an active process	A few students can dominate Some students may not participate Is time consuming Can get off the track	discussion Requires question outline
Small group discussion	Discussions among students. Can be "discuss two and two" or it might be larger groups. Typically the group should be no larger the eight people to allow all to contribute.	Allows for participation of everyone Students often more comfortable in small groups Groups can reach consensus	Needs careful thought as to purpose of group Groups may get side tracked	Need to prepare specific tasks or questions for group to answer
Case Studies	Students are given a real life example and are asked to work it through – including identifying the relevant questions to address in order to come with a realistic, worked through scenario	Develops analytic and problem solving skills. Allows for exploration of solutions for complex issues. Allows student to apply new knowledge and skills	Students may not see relevance to own situation Insufficient information can lead to inappropriate results	Case must be clearly defined Case study must be prepared
Role Playing	Students are given different roles representing the different stakeholders in a situation (it might be based on a realistic case or it might be a thought case). The students are given time to prepare the general attitude they represent and the situation is played.	Introduces problem situation dramatically Provides opportunity for students to assume roles of others and thus appreciate another point of view Allows for exploration of solutions Provides opportunity to practice skills	Some students may be too self-conscious Not appropriate for large groups Some students may feel threatened	Teacher has to define problem situation and roles clearly Teacher must give very clear instructions
Worksheet surveys	Students are asked to complete a survey. Only really makes sense if the survey is analysed and is used in the course.	Allow students to think for themselves without being influenced by others Individual thoughts can then be shared in large group	Can be used only for short period of time	Teacher has to prepare handouts
Hands on	The students are	Allow students to	Students are	Teacher needs to

exercise	given very precise problems to solve. It might be a program they need to develop and make run or it might be quizzes relevant for the problem addressed or it might be solving specified problems	work with real type problems. Can be programming or concrete, practical exercises	required certain skills to fulfil the requirements.	prepare exercises. The problems should as a preparation be solved be another teacher to make sure they are solvable within allocated time

6.2.2 Supporting Documentation

Once the various delivery methods have been decided, course tutors will be required to produce a series of course documentation to support the teaching. The course development task will design these templates. This document has already outlined some of the features of Moodle which will be used to support an event, but a degree of course material will also be required for use at the event itself. Whilst further templates may be identified during the development task, the key materials defined by the workpackage as being essential to high quality delivery include: -

PowerPoint templates – regardless of the combination of teaching methods that are selected for a certain course, a degree of presentations and lectures will be inevitable. A structured template for presentations will therefore be essential. The workpackage will use the general presentation template produced by the project as a basis for its own designs.

Presentation abstracts – each speaker will be required to produce a short abstract outlining the purpose and content of their session, for the benefit of attendees. A template for this information will be developed to ensure consistency across the courses.

Worksheets – a variety of worksheets will be required to support training exercises, such as example scenarios, questions or handouts on key principles. The design task will work to produce templates for each of these types, which are structured in such a way that they are easy to complete, and that participants attending a number of courses will build up a set of compatible supporting documentation.

Agenda and course programme templates – these templates will ensure that each course follows a similar structure, and allows adequate time for breaks as well as individual sessions.

6.3 Course Evaluation

The Planets training workpackage will apply a series of measures to ensure that the course programme is continually evaluated and revised, thus providing the best possible knowledge and skills development for the core communities.

The methods used to carry out evaluation will be finalised in the course development phase and constantly monitored as the programme progresses, but at present it is envisaged that the following approaches will be included: -

Online evaluation form – Attendees of each course will be asked to complete an online evaluation form providing feedback on a number of aspects of the course including structure, organisation, speakers, documentation and content. The workpackage will develop the contents of the form based on examples from other projects the partners have had involvement in, such as the DCC. An initial evaluation form template can be viewed in appendix A3.

Report template – once the results of evaluation forms have been analysed an evaluation report will be produced, consolidating the feedback on the course and highlighting its successes and areas for improvement. A template for this report is provided in appendix A4.

Course completion form – this form will be completed after each course. It will provide information on the course and its outcomes, and well as details of attendees and lecturers essential for statistical purposes. As such this form will ensure that each aspect of the course has been considered and in conjunction with the evaluation report provide complete documentation on an event against which its success can be measured. The form template can be found in appendix A5.

The Description of Work specifies that after the first two training courses have been delivered a report on the events will be produced, which measures the effectiveness of the courses. The delivery of this report will also provide an opportunity to test whether the evaluation mechanisms put in place are themselves sufficient, and allow any alterations to be made as necessary.

The evaluation report will allow the workpackage to move into the next phase of training with a refined approach to the programme. After the report evaluation will continue to play a key role in the work of DT6, with modules consistently assessed and revised. Feedback and analysis will also be used to tackle the extra training needs of those who have already completed PLANETS courses, and assist partners in expanding remote skills development services to support these groups.

6.4 Quality Assurance

The Planets training workpackage will be producing a high volume of materials, both online and printed, with a significantly wide distribution level. It is therefore essential that these materials are of the highest quality, as they reflect the image of the training programme and the project as a whole. In order to address this issue the workpackage will develop rigorous quality assurance mechanisms, ensuring materials pass through a level of approval appropriate to their potential dissemination level. Quality assurance levels will be finalised in the training development task, but at this stage the workpackage envisages the following level of approval for the materials produced: -

Completed template/form	QA approval level
Pre-course questionnaire	2 reviewers (also speakers at event)
Presentation abstracts	1 reviewer
Worksheets	2 reviewers (1 other speaker, 1 not participating in event
Agendas	2 reviewers (1 other speaker, 1 not participating in event
Online tutorials	2 reviewers (1 other partner experienced in this area, 1 with more limited knowledge

As outlined in the table above, where materials are being produced that directly influence the knowledge and skills development of the participants, one reviewer should always be an individual not directly involved in the design of the event or tutorial. This will ensure an objective viewpoint essential to developing materials that avoids pre-course knowledge assumptions.

Dissemination materials and reports will also require a level of quality assurance. The workpackage will ensure that each course initiation form, evaluation report and course completion form is approved by three other members of the workpackage before the final version is distributed.

Appendices

A.1 Course Initiation Form

Project Name	*[Name of the Project, e.g. PLANETS, CASPAR, DPE, DCC]*		
Course Title	*[full title of course]*		
Dates	Start date	End date	
	[format: dd/mm/yyyy]	*[format: dd/mm/yyyy]*	
Learning hours	Pre-Course learning hrs anticipated	Actual course learning contact hrs	Post-course learning hrs anticipated
Venue	*[venue where the course was held]*		
City	*[city where course was held]*		
Country	*[country where course was held]*		
Lead Partner	*[partner who lead training]*		
Key Participating Partners	*[names of other partner organisations]*		
Possible Hosting Organisation	*[organisation which provided venue or sponsored venue]*		
Possible Names of Sponsors	*[names of non-project partner organisation that sponsored the meeting]*		
Description of Intended (targeted) Audience	*[description of the audience]*		
Description of Course (including purpose)	*[300 wd description of the course]*		
Course Objectives	*[list up to 5 objectives of the course]*		
Course Aims	*[list up to 5 aims of the course]*		
Benefits for attending	*[list between 5 and 7 benefits for having attended the course]*		
Required experience or prior knowledge	*[describe any background experience or skills that participants should have if they are to take part]*		
Teaching and learning approaches used	*[list teaching and learning approaches used]*		
Possible teachers	Name of Lecturer	Institutional Affiliation	Area of expertise
	[Add additional rows as necessary]	*[Add additional rows as necessary]*	*[Add additional rows as necessary]*
Intended No. of Participants	Students	Lecturers	Total
Description of characteristics of training materials	*[format, scale, interactive, printed, pdf/ppt or other, number of slides, length of time material was intended to be used for]*		
Didactic methodologies	*[statement about where the training materials are available including a web address for them.]*		

Language of the Teaching	*[e.g. English, French, German]*			
Material to be delivered before course with dates	*[e.g. lists of readings or pre-course exercises]*			
Registration	Date Registration system initiated	Date Registration system passed test	Date Registration Opens (system goes live)	Date registration closes (date on which system taken down)
	[format dd/mm/yyyy]	*[format dd/mm/yyyy]*	[format dd/mm/yyyy]	*[format dd/mm/yyyy]*
Funding	Amount of funding from Project	Income from course fees	Actual Income from Sponsors	Financial value of in-kind contributions
Course Business Plan	*[Has the course business plan be prepared and approved. This should include details of costs, income, etc. Include course business plan as an appendix and indicate whether this is profit or loss position.]*			
Notes/Additional Comments	*[add any additional notes that you think would be useful]*			
Course Preparation Checklist	*[is course preparation checklist prepared, and what is its file name]*			
Compiler of Report	*[name of the compiler of the report]*			
Date report completed	*[Format, dd/mm/yyyy]*			
Name of signing off proposal	*[name of person who checked report]*			
Date proposal agreed	*[Format, dd/mm/yyyy]*			

A.2 Course Checklist Template

Checklist	Details	Date completed
Logistics Research potential venues and compare prices and availability		
Send purchase order to venue with event details		
Identify any special requirements for the event (wireless access, accommodation on-site, table for panel session, roaming microphones, recording of event, evening reception)		
Arrange timings for catering		
If providing an event dinner, select venue and make payment arrangements via invoice		
Arrange for a registration desk to be set up		
Speaker Communications Ongoing communication with speakers regarding event, travel and accommodation		
Create announcement for the event outlining themes, dates, benefits from attendance		
Compile list of hotels in the area		
Create map(s) of venue and if necessary for dinner location		
Compile list of travel options for participants		
Have registration page created		
Have feedback page created		
Create and maintain database of registrants and log payments		
Create invoice template for event and email to registrants		
Email all participants with final details a few days before the event		
Event materials Select and inform speakers of due date for event materials to be delivered for printing		
Create list of participants for packs		
Create badges for event		
Create final programme for event		
Make copies of materials for packs		
Collate materials, flyers, badges		
Make back-up copies of print materials on memory stick		
Create sign-in sheet for participants		
At the event Meet and liaise with venue contact		
Set up registration desk and banners		

Distribute packs and monitor sign-in sheet		
Meet and liaise with speakers and ensure that they understand the format and timings		
Meet and liaise with venue technical staff		
Ensure that all presentations are loaded to pc or arrange that speaker use their own laptop		
Liaise with catering staff		
Following the event, ensure that all presentations have been saved to memory stick		
After the event Email participants and thank them for participation and encourage feedback submission		
Set up pages in Moodle with presentations and course documentation		
Set up Moodle Forum threads to allow continued discussion		
Ensure that all invoices are paid for venue hire and catering		
If applicable, send thank you letter to co-sponsoring organisation(s)		
Analyse feedback returns		
Produce event report		
Plan follow-up activity if applicable		

A.3 Evaluation Form Template

FEEDBACK FORM

This form is intended to gather information about the event from the participants. It will only take a couple of minutes to fill in, and will provide us with valuable information about the usefulness and benefits of the event.

Please rate some of the aspects of the seminar by circling one of the numbers where: **1=Poor** and **5=Excellent**

Event Title

Date
Location

About the Event

1=Poor and **5=Excellent**

1. How effective were the speakers?

1 2 3 4 5

2. How would you rate the structure of the event?

1 2 3 4 5

3. How useful was the background documentation?

1 2 3 4 5

4. How would you rate the organisation of the event?

1 2 3 4 5

5. How well did you feel that the event addressed the main topic?

1 2 3 4 5

6. Was the cost acceptable? (Please circle one)

Yes No

7. Did this event meet your expectations? (Please circle one)

Yes No

If not, why not?

8. What will you be able to take from this event back to your own organisations?

9. What else would you like to have seen covered at this event?

10. What did you like best about this event?

11. What did you like least?

About you

12. Do you work for a

- ❑ National Library
- ❑ National Archive
- ❑ Public Sector Organisation
- ❑ Commercial company
- ❑ Academic Institution
- ❑ Consultancy
- ❑ Other (Please specify) _____

13. What is your function?

(Please specify; e.g. Librarian, Digital Archivist, Software Developer, etc.)

14. How did you hear about this seminar?

- ❑ Listserv (Please specify)
- ❑ An Organisation or Institution (Please specify)
- ❑ Colleague
- ❑ Web search
- ❑ Planets Website
- ❑ Other (Please specify) _____

15. What motivated you to attend? (please tick as appropriate)

- ☐ Interest in the topic
- ☐ Interest in the Planets Project
- ☐ Interest in digital preservation
- ☐ Location
- ☐ Speakers
- ☐ Other (Please specify)

_____

16. Are you likely to attend other Planets events in the future?

17. Please feel free to make any additional comments.

A.4 Evaluation Report Template

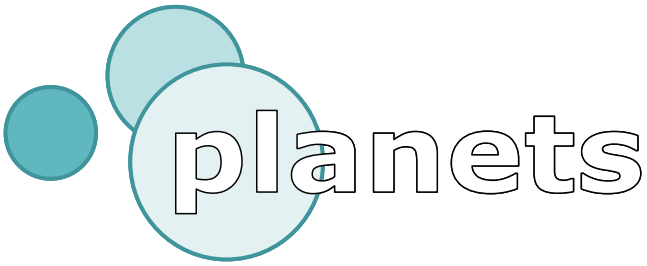
Course Title:		Dates:
Venue:	City:	Country:
Lead Partner:		Participating Partners:
Audience: *[brief description of attendees]*		
Description of course: *[summary of course and main content]*		
Organisation of event: *[review of attendee feedback and overall success of organisation]*		
Structure of course: *[analysis of attendees' feedback on structure of the course]*		
Learning and teaching methodologies: *[were the teaching methods used the most suitable for the nature of the topic, did they suit the level of the audience etc]*		
Speakers: *[analysis of feedback, how well did speakers convey the main learning outputs]*		
Supporting material and documentation: *[how useful did participants find the materials, were any unsuitable, should any extra materials have been provided?]*		
Effectiveness of communication channels used to promote event:: *[how did most attendees hear about the course, were any communication channels particularly successful]*		
Key areas for improvement:		
Actions:		
Compiler of report:		Date of report:

A.5 Course Completion Form

Project Name	*[Name of the Project, e.g. PLANETS, CASPAR, DPE, DCC]*			
Course Title	*[full title of course]*			
Dates	Start date	End date		
	[format: dd/mm/yyyy]	*[format: dd/mm/yyyy]*		
No hrs of training	*[number of contact hours]*			
Venue	*[venue where the course was held]*			
City	*[city where course was held]*			
Country	*[country where course was held]*			
Description of Course	*[300 wd description of the course, even though this is on the initial documentation it should appear here again as this document is likely to be distributed separately from the initiation document.]*			
Lead Partner	*[partner who lead training]*			
Key Participating Partners	*[names of other partner organisations]*			
Hosting Organisation	*[organisation which provided venue or sponsored venue]*			
Names of Sponsors	*[names of non-project partner organisation that sponsored the meeting]*			
Description of Audience	*[description of the audience]*			
No of Participants	Students	Lecturers	Total	
Origin of Lecturers	No. from host country	No. from other Europe	No from outside Europe	Total
Origin of Students	No. from host country	No. from other Europe	No from outside Europe	Total
Institutional background of participants	No. from Academic Institutions	No. from Commercial (but non-vendor/software developers)	No. from vendors/software developers	No. from public sector institutions
Gender Distribution	No. of MALE Participants		No. FEMALE Participants	
Description of characteristics of training materials	*[format, scale, interactive, printed, pdf/ppt or other, number of slides, length of time material was intended to be used for]*			
Availability of Training materials	*[statement about where the training materials are available including a web address for them.]*			
Language of the Training Materials	*[e.g. English, French, German]*			

<table>
<tr><td>Licensing arrangements for the training materials</td><td colspan="4">[e.g. copyrighted, creative commons]</td></tr>
<tr><td>Planned or completed publications</td><td colspan="4">[list any publications that might be planned from the event, or of the materials]</td></tr>
<tr><td>Registry</td><td colspan="4">[is there a registry of students who took the course]</td></tr>
<tr><td rowspan="3">Funding</td><td>Amount of funding from Project</td><td>Income from course fees</td><td>Actual Income from Sponsors</td><td>Financial value of in-kind contributions</td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
<tr><td>Summary of Course Evaluation</td><td colspan="4">[general description of the findings of the evaluation, say 300 wds]</td></tr>
<tr><td>Location and file name of Evaluation Report</td><td colspan="4">[url were the analysis of the course evaluation is located and its file name]</td></tr>
<tr><td>Follow-up</td><td colspan="4">[are there any next steps or outcomes]</td></tr>
<tr><td>Notes/Additional Comments</td><td colspan="4">[add any additional notes that you think would be useful]</td></tr>
<tr><td>Compiler of Report</td><td colspan="4">[name of the compiler of the report]</td></tr>
<tr><td>Date report completed</td><td colspan="4">[Format, dd/mm/yyyy]</td></tr>
<tr><td>Name of person checking report</td><td colspan="4">[name of person who checked report]</td></tr>
<tr><td>Date report checked</td><td colspan="4">[Format, dd/mm/yyyy]</td></tr>
</table>

A.6 DT/6 workplan m1-m18



Project Title	PLANETS
Workpackage	DT/6 - Training
Document	Workplan
Date	7th December 2006
Author (primary)	Kellie Snow (HATII), Seamus Ross (HATII)
Authors (contributory)	Hans Hofman (NANETH), Bart Ballaux (NANETH), Michael Poltorak Nielsen (SB), Jørn Thøgersen (SB)

DT/6 Proposed Workplan

Introduction

The DT/6 workpackage will deliver a range of training in order to provide a conduit between the innovators of the project and user communities and provide training opportunities to staff in libraries, archives, consultancies and technology development companies.

The knowledge and skills development training activities will cover the other five sub-projects of PLANETS, core areas in which new methodologies, technologies and services will be produced. Initially the PLANETS Education Team (PET) will focus on defining the training aims, encouraging takeup, developing individual course aims and objectives, and designing training that can be quality assured and is widely and evenly distributed across the member states. Subsequently, PET will focus on quality assurance, measuring the effectiveness of training and tracking additional training needs.

The integrated project will approach the overall activity in four stages, of which three are concentrated in the first eighteen months and one of which begins in the first eighteen months and runs beyond the end of the project. For each of the four core training domains PLANETS will identify an approach to training that is responsive to the learning and teaching needs of the particular group being trained, offered in the most appropriate training environment, most effective in the methods it uses, and matched in the level of detail and intensity to the ways in which the participants are likely to use the knowledge and skills acquired through the training.

Specifications

The PLANETS 'Description of Work' outlines a number of specifications in relation to the range of training that should be delivered. These can be summarized as: -

Audiences to which training will be offered: -
- Practitioners
- Bespoke developers
- Vendors
- Researchers
- Training professionals

Types of training: -
- Online tutorials (PP, PA, PC)
- Large group classroom teaching (PP, PA, PC)
- Hands-on small group training (IF, TB)

Number of courses: -
- 40 hours of remote learning tutorials
- 12 two-day courses over 12 EU member states
- 5 three-day hands on small group training courses (for developers)
- 5 five-day hands on small group training courses (for librarians and archivists)

Training Course Areas

Preservation Planning
- creating high-quality and cost-effective preservation plans
- implementing PLANETS planning models
- applying PLANETS planning tools and templates
- testbed/validation training

Preservation Action
- preservation action framework and existing tools (vendors and practitioners)
- using PLANETS registries and existing preservation approaches (practitioners)

- integrating PLANETS registries and new tools into products they're building(vendors)
- introducing researchers to gaps and to PLANETS framework for creating suitable preservation tools and services
- knowledge and skills development in innovative preservation approaches

Characterisation
- how PLANETS Characterisation Framework can be implemented and integrated with metadata-extraction and other validation tools (practitioners and developers)

Testbed
- enable practitioners, developers and researchers to implement, use and interpret results that come from the testbeds

Interoperability Framework
- how to install and configure PLANETS service node
- how to wrap existing or new tools as PLANETS services
- how to create, access and manipulate shared data repositories and how to integrate external data sources
- modelling and execution of preservation workflows based on PLANETS orchestration mechanism

A knowledge and skills development portfolio is envisaged which would enable participants to complete individual PLANETS training modules on an ad hoc basis. Others would achieve PLANETS stars and when a certain amount of training and abilities in PLANETS methods and technologies had been collected they would be granted the status of PLANETS Certified Engineers. This indicates that a modular approach to the training programme will be vital to ensure consistency throughout the training programme.

Goals

The first 18 months of the workpackage is divided into three key tasks, with an initial definition of training needs to be carried out before tasks begin. The tasks are: -

- Training Plan (DT/6.1)
- Training Development (DT/6.2)
- Training delivery and Assessment (DT/6.3)

The workpackage also has two deliverables and one milestone for the first 18 months of activity: -

DT/6-D1: PLANETS Training Plan (m11)
DT/6-D3: Report on first two PLANETS training courses (m18)

M1: Launch first PLANETS training course (m14)

In order to carry out these tasks and to meet deadlines a structured approach to the workpackage needs to be developed. Below is an identification of the key stages and outputs for the first 18 months, which will need to be completed in order to achieve the deliverables. These stages have been developed from the information provided in the ‘Description of Work’.

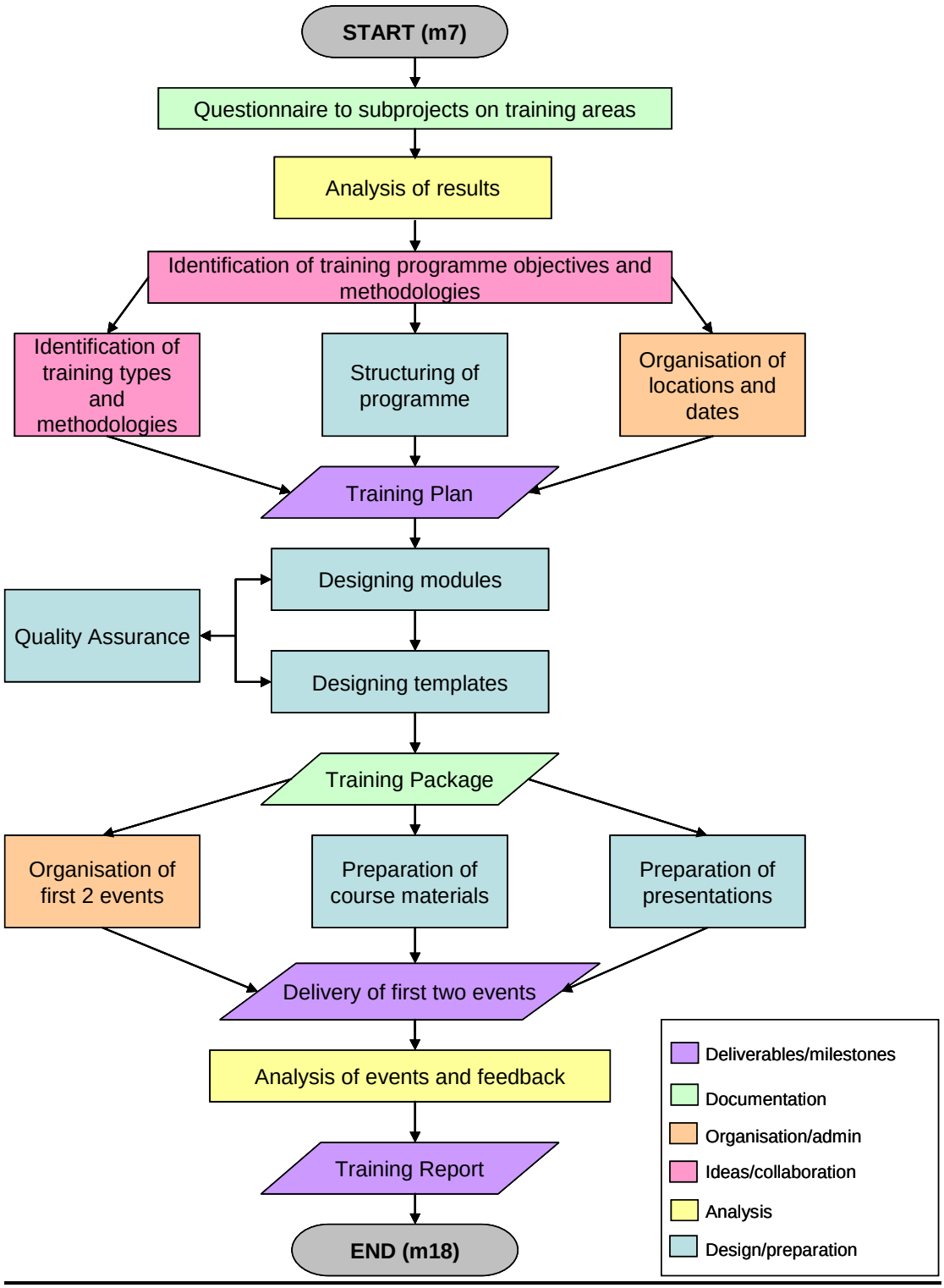
General stages/outputs

- Questionnaire and communications with subprojects on areas for training
- Identify training programme objectives and methodologies
- Identify types of training and methodologies

- Structure training programme
- Organise course dates and locations
- Produce training plan document
- Design training modules
- Design templates
- Prepare supporting course materials for first two events
- Organise first two courses
- Prepare presentations for first two courses
- Deliver first two training courses
- Evaluate feedback and effectiveness of first two courses
- Produce report on first two training courses

The diagram below outlines the flow of activity for these stages, along with the nature of the activities themselves, demonstrating the variety of skills which will be required.

Diagram of workflow for DT/6 workpackage, m7 to m18



Proposal for first 18 months

Phase 1: Needs definition and training plan (m6 to m14)
During this phase the partners will define what PLANETS aims to achieve through providing training, which communities would benefit and the areas of the project where training could be offered. Work will then move towards the production of the training plan document which will develop these definitions, as well as containing more specific details such as outlining the courses that will be running, individual course objectives and locations, dates and times.

Needs definition – The work will begin with an online questionnaire to subproject leaders that will be used to identify areas for training and possible timescales. Analysis of responses will allow DT/6 to plan the training programme in line with the outputs of the subprojects. More in-depth communications with the subprojects may be carried out as necessary. At the same time workpackage partners will identify overall training aims and objectives which will allow objectives for individual courses to then be defined. These aims and objectives will be stated in the training plan.

Training Plan - From the results of the subproject questionnaire the workpackage will define the training programme and for each potential course address the following questions: -

Delivery and logistics
- When is the best time to offer the course (deciding factors include: readiness to deliver, achieving the best audience, and delivering the most value to the audience)?
- What educational environment would best ensure that these learning outcomes are delivered and achieved?
- What will be the most effective combination of teaching methods?
- What resources will be required to deliver the training?
- Should the course be designed as one which would be offered on a one-off basis or on repeat occasions, or should it be designed to train other trainers, given substantial distributed market potential?

Partner involvement
- Which of the partners will be best placed to contribute to the delivery of the training?
- Which partner will be responsible for leading the particular training course?
- Which partners will contribute to the specific training course?
- What kind of trainers will be needed to deliver the training (e.g. professional trainers, practitioners, researchers)?

Audience
- What is the likelihood of attracting attendees to the course and what is the most effective method of making the community aware of the
- What is the optimum size of the cohort to be trained?

Content and evaluation
- What are the learning outcomes of the particular training course?
- course and its value (e.g. statement of benefits)?
- What content, at a high level, needs to be delivered to achieve these learning outcomes?
- How long will it take for participants to acquire the knowledge and skills required? (This will be balanced against an intention to ensure that residential educational opportunities are offered in 2, 3 or 5 day units and remote learning involves around 40 hours of activity).
- What content, at a detailed level, will be delivered in the course?
- How will the success of the participants in achieving the learning outcomes be measured (e.g. assessment exercise, follow up questionnaire)?
- How will the effectiveness of the training and its impact be accessed?

The answers to these questions will allow a firm and consistent training programme to emerge, with clear training types and methodologies that ensure learning outcomes are achieved. They will allow the workpackage to establish locations for each training course, taking into consideration both who will be delivering the training and the need to reach as many EU member states as possible. Dates will also be established in line with the outputs of the subprojects. The final document is likely to consist of the following sections: -

- The aims of the PLANETS training and what it hopes to achieve
- Benefits to different communities
- How take-up of training will be encouraged
- Countries where training will be held
- Individual aims, objectives and learning outcomes of each course
- Locations and dates
- Charging plan

This detailed plan will thus provide a step-by-step programme for the running of the PLANETS training, and allow for a seamless move to the training development task.

Phase 2: Training development, delivery and assessment (m10 to m18)
This phase will build upon the training courses identified in the training plan by producing more detailed literature and tools to support these courses. This will include agreeing a training methodology, developing modules and templates, preparing briefing documents, schedules and programmes, and the organising of the first two training courses. The events themselves will then be delivered and a report including an evaluation of their success will be produced.

Training development - The development phase will require a significant amount of work in order to produce a variety of supporting literature that covers every aspect of the organisation and delivery of a training event. It is essential that a methodology is established from the outset, and that templates are agreed upon to ensure documentation is consistent. The following tasks will need to be addressed: -

- Design of modules – this will follow on from what is outlined in the training plan, by developing each course into a more cohesive module. The partners will work on the premise that whatever is covered in the two day courses can be fed into the three day events, and this detail into the five day events. This offers consistency for the variety of groups who will be undertaking PLANETS training, ensuring each receives the same knowledge and skills development.
- Design of templates – knowledge of what each module will contain will allow for the development of generic templates, which can be used for the variety of training methods and events. The workpackage will draw upon experience from other projects, such as ERPANET and the DCC, to design templates that any PLANETS partner can use to organise and deliver an event. The level of detail should be such that every aspect of organising and delivering an event will be covered by these templates. As well as templates for the documentation at the course itself, an event management tool will also be developed that provides all the guidance necessary in organising an event.
- Quality assurance – this will be considered in the design of each module and template, and clear measures will be introduced to ensure the courses and their supporting literature are of the highest quality. Again experiences and procedures from other projects will be drawn upon.
- Preparation of course materials – this will focus on using the templates to produce supporting documentation for the first two training events

Training delivery and assessment - The outputs which have been produced in the development stage will be tested and evaluated through the organisation and delivery of the first two training events. As only a limited amount of PLANETS partners have been allocated time to the training workpackage for the first 18 months, it will be these partners who will organise and deliver the first two courses. From the outset it is anticipated that the first two courses will be two-day events focussing on the Preservation Planning and Testbed subprojects, areas in which the current DT/6 partners are involved. The task will involve the following sub-tasks: -

- Organisation of events – this will involve arranging the practicalities of the event using the templates developed, as well as lining up speakers etc.
- Delivery of training courses – partners will be allowed adequate time to prepare presentations and workshops, and to deliver the course itself. We will work on the premise that for every hour of teaching, eight hours of preparation is required.
- Feedback and interpretation – as part of the delivery partners will gather feedback on the events, and a designated partner will then interpret the results as part of a general course evaluation in preparation for inclusion in the training report.
- Training report – this will provide a synopsis of the first two training events, and more importantly evaluate the effectiveness of these early courses. It will analyse feedback on the events and highlight any changes which need to be made to templates to ensure the effectiveness of the rest of the training programme.

Phase 3 (m19 onwards)

The training report in month 18 will prepare the way for the next phase of the training workpackage, which will concentrate on the development of a whole series of modules based around PLANETS tools and modelled on the first two courses and their assessment. The training plan will have already outlined which partner is responsible for the delivery of which modules, based on the areas of PLANETS they are involved in. The locations and dates of each training event will also have been identified. A detailed support package will also have been created which will allow any partner to effectively plan and deliver a training event on their designated area. In addition to the training courses, the workpackage will also tackle the extra training needs of those who have already completed PLANETS courses, and develop remote skills development services to support these groups.

Work Allocation

The PLANETS training workpackage is extensive, involving nearly all partners at some point during the course of the project. For the first 18 months, with which this document is concerned, only five partners have allocated time, as displayed below.

IP Efforts (taken from the "Description of Work")

Full Duration of Project

Partner	BL	KB-NL	SB	KB-DK	ONB	NANETH	TNA	BAR	UzK	ALUF	WIEN	HATII	TESS	ARC	IBM	Total
Mths	2	2	4	2	2	5	2	4	2	2	2	18	2	2	2	**53**

First 18 months

Partner	BL	KB-NL	SB	KB-DK	ONB	NANETH	TNA	BAR	UzK	ALUF	WIEN	HATII	TESS	ARC	IBM	Total
Mths	0	0	2	0	0	2	0	0	0	0	1	4	1	0	0	**10**

Last 30 months

Partner	BL	KB-NL	SB	KB-DK	ONB	NANETH	TNA	BAR	UzK	ALUF	WIEN	HATII	TESS	ARC	IBM	Total
Mths	2	2	2	2	2	3	2	4	2	2	1	14	1	2	2	**43**

In order to designate workloads which will be both realistic for partners but also ensure deliverables are met, a clear work allocation plan needs to be developed. Based on a consideration of the key tasks in the workpackage, an overall person-months time for each task was suggested. These times were then separated further between each of the partners, as displayed below. HATII has time spread across each of the tasks due to its role as workpackage leader, with a concentration on tasks which will require the most time-consuming work. NANETH and SB are also involved substantially in each task. WIEN and TSS have work confined to the latter stages, allowing each to contribute to the large training development task and the delivery of one training course.

Overall time allocations for each partner (per task)

	HATII	SB	NANETH	WIEN	TSS	Total time
Needs definition	0.75					0.75
Training Plan	1.25	0.75	0.75			2.75
Training Development	1	0.5	0.75	0.75	0.75	3.75
Training Delivery	1	0.75	0.5	0.25	0.25	2.75
Total time	4	2	2	1	1	**10**

To allocate time more specifically, the following table revisits the key stages outlined earlier in this document, and provides suggested dates for completion of each stage. More importantly, it specifies exactly which partners will be responsible for each task.

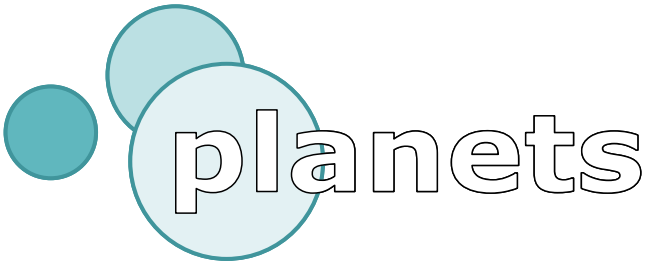
Detailed workplan for stages/outputs in workpackage

Stage/output	Partners responsible	Expected date of completion	Effort
[Setup of workpackage]	HATII	8/12/06	0.5
Training needs and definition Questionnaire/communications with subprojects on areas for training	HATII	31/12/06	0.25
Training plan Identifying training programme objectives and methodologies	HATII, SB, NANETH	31/01/07	0.75
Identifying types of training and methodologies	HATII, SB, NANETH	31/01/07	
Structuring of training programme	HATII, NANETH	28/02/07	1
Organising of dates and locations	HATII, SB	28/02/07	
Production of training plan document	HATII, SB, NANETH	31/03/07	1
Training development Designing of modules	HATII, WIEN, NANETH	31/05/07	1.75
Designing of templates	HATII, WIEN	31/05/07	
Quality assurance	HATII	30/06/07	0.25
Preparation of course materials	SB, NANETH, TSS	30/06/07; 31/08/07; 30/09/07	1.75
Training delivery and assessment General organisation of events	HATII, NANETH, TSS, WIEN	31/07/07; 30/09/07	1.5
Preparation of presentations/exercises	HATII, NANETH, TSS, WIEN, SB	31/07/07; 30/09/07	
Delivery of training	HATII, NANETH, TSS, WIEN	31/07/07; 30/09/07	
Interpretation of feedback	HATII, SB	31/08/07; 31/10/07	0.5
Training report document	HATII, SB	30/11/07	0.75

Finally, a clear month-by-month work allocation table shows the time each partner will spend on each task, and also indicates which tasks will be covered in which months

	[Needs definition and setup of w/p]					**DT/6.1 Training Plan**					**DT/6.2 Training development**					**DT/6.3 Training delivery and assessment**				
	HATI	SB	NAN	WIE	TSS	HAT	SB	NAN	WIE	TSS	HAT	SB	NAN	WIE	TSS	HAT	SB	NAN	WIE	TSS
Nov (6)	0.25																			
Dec (7)	0.5																			
Jan (8)						0.25	0.25	0.25												
Feb (9)						0.5	0.25	0.25												
Mar (10)						0.5	0.25	0.25			0.25									
Apr (11)											0.25			0.5						
May (12)											0.25		0.25	0.25						
Jun (13)											0.25				0.25		0.25	0.25		
Jul (14)												0.25			0.25			0.25	0.25	
Aug (15)													0.25		0.25	0.25				
Sep (16)												0.25	0.25			0.25				0.25
Oct (17)																	0.25			
Nov (18)																0.5	0.25			
Partner totals (per task)	**0.75**					**1.25**	**0.75**	**0.75**			**1**	**0.5**	**0.75**	**0.75**	**0.75**	**1**	**0.75**	**0.5**	**0.25**	**0.25**
Task totals	**0.75**					**2.75**					**3.75**					**2.75**				

A.7 DT/6 Workplan m13-m30



Project Title	PLANETS
Workpackage	DT/6 - Training
Document	Workplan m13-30
Date	20th April 2007
Authors	Kellie Snow (HATII), Seamus Ross (HATII)

1. Introduction

1.1 Objectives

This work package involves the design, delivery, and assessment of the effectiveness and impact of the Planets Training Programme. It will:

- maximise take-up of Planets methods, products and services by providing a conduit between the innovations of the project and their subsequent exploitation and adoption by potential user communities;
- offer learning opportunities for staff in archives, libraries, data archives and universities to promote the take-up of Planets methods, practices, and technologies;
- provide capability building training for consultancies, SME technology developers, and vendors;
- 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.

During the first twelve months of the project the workpackage have concentrated on identifying training needs and opportunities, and on producing the first deliverable, the Planets training plan. The work over the next 18 months will consist of developing course materials, delivering courses, establishing an online learning support facility, and evaluating the training programme. This document will provide further clarification on each of these tasks and propose a partner effort allocation through to the end of the project.

1.2 Goals

The workpackage has several defined tasks for the period m13-30: -

DT/6.2 – Training development
DT/6.3 – Training delivery and assessment
DT/6.4 – Training programme rollout
DT/6.5 – Development of online learning support facility
DT/6.6 – Ongoing evaluation of training programme

A number of deliverables and milestones have also been specified: -

DT/6-D2: Report on first two Planets training courses (m19)
DT/6-D3 – Programme for third and fourth Planets Training Courses (m20)
DT/6-D4 – End of Phase II report on progress of training programme (m30)

M1 – Launch first Planets' training course (m16)
M2 – Launch of the Online Learning Support Facility with pre- and post-course material for the third and fourth courses (m20)

2. Tasks 6.2 and 6.3 – training development, delivery and assessment (m13-19)

[Details of this stage of the workpackage have already been provided in the first DT/6 workplan, covering m1-m18. They are repeated here for reference]

This phase will build upon the training courses identified in the training plan by producing more detailed literature and tools to support these courses. This will include agreeing a training methodology, developing modules and templates, preparing briefing documents, schedules and programmes, and the organising of the first two training courses. The events themselves will then be delivered and a report including an evaluation of their success will be produced.

Training development - The development phase will require a significant amount of work in order to produce a variety of supporting literature that covers every aspect of the organisation and delivery of a training event. It is essential that a methodology is established from the outset, and that templates are agreed upon to ensure documentation is consistent. The following tasks will need to be addressed: -

- Design of modules – this will follow on from what is outlined in the training plan, by developing each course into a more cohesive module. The partners will work on the premise that whatever is covered in the two day courses can be fed into the three day events, and this detail into the five day events. This offers consistency for the variety of groups who will be undertaking PLANETS training, ensuring each receives the same knowledge and skills development.
- Design of templates – knowledge of what each module will contain will allow for the development of generic templates, which can be used for the variety of training methods and events. The workpackage will draw upon experience from other projects, such as ERPANET and the DCC, to design templates that any PLANETS partner can use to organise and deliver an event. The level of detail should be such that every aspect of organising and delivering an event will be covered by these templates. As well as templates for the documentation at the course itself, an event management tool will also be developed that provides all the guidance necessary in organising an event.
- Quality assurance – this will be considered in the design of each module and template, and clear measures will be introduced to ensure the courses and their supporting literature are of the highest quality. Again experiences and procedures from other projects will be drawn upon.
- Preparation of course materials – this will focus on using the templates to produce supporting documentation for the first two training events

Training delivery and assessment - The outputs which have been produced in the development stage will be tested and evaluated through the organisation and delivery of the first two training events. As only a limited amount of PLANETS partners have been allocated time to the training workpackage for the first 18 months, it will be these partners who will organise and deliver the first two courses. From the outset it is anticipated that the first two courses will be two-day events focussing on the Preservation Planning and Testbed subprojects, areas in which the current DT/6 partners are involved. The task will involve the following sub-tasks: -

- Organisation of events – this will involve arranging the practicalities of the event using the templates developed, as well as lining up speakers etc.
- Delivery of training courses – partners will be allowed adequate time to prepare presentations and workshops, and to deliver the course itself. We will work on the premise that for every hour of teaching, eight hours of preparation is required.
- Feedback and interpretation – as part of the delivery partners will gather feedback on the events, and a designated partner will then interpret the results as part of a general course evaluation in preparation for inclusion in the training report.
- Training report – this will provide a synopsis of the first two training events, and more importantly evaluate the effectiveness of these early courses. It will analyse feedback on the events and highlight any changes which need to be made to templates to ensure the effectiveness of the rest of the training programme.

3. Task 6.4 – Training Programme Rollout

Based on the contents of the training report in m19, this task will begin by making any necessary changes to the training course approach, before planning and delivering a further three training courses. It will use the templates and supporting material developed in the training development phase to organise, deliver and evaluate each face-to-face course, as well as providing course attendees with pre- and post-residential support through Planets' online training facility. Whilst carrying out this work every effort will be taken to collaborate with other EU projects in joint initiatives and training events. The task will consist of the following sub-tasks: -

- Organisation of event – this will include logistics such as the booking of venues and catering, plus correct marketing of the course including press releases through various communication channels. The workpackage will take advantage of the pre-course documentation provided in the training plan, including event checklist and course initiation form. Liaison between the DT/6 workpackage leader and the leaders of other EU training programmes will also be required to identify any collaborative opportunities.
- Preparation of presentations and course materials – as the course is being organised identified speakers for the event will develop their presentations, training activities and supporting course literature using the templates developed in the course design stage.
- Contribution to online training facility – as well as producing supporting documentation for the event itself partners will add information to the online training facility to support course attendees both before and after the event. The tools used will include pre-course questionnaires, quizzes and forums.
- Attendance of event – partners responsible for the course will attend the event and deliver the training.
- Gathering of feedback and evaluation of event – at the end of each event one partner will be responsible for gathering feedback at and immediately after the event, along with completion of the course evaluation form. This will provide useful information on the success of the course and identify any areas for improvement.

4. Task 6.5: Development of Online Learning Support Facility

As task 6.4 begins the workpackage will also concentrate on the deployment of an online learning support facility (based on the open source toolkit Moodle) and populate this with training materials to support the delivery of pre- and post-course educational materials. During the period up to month 30 the facility will be used to support the face-to-face courses; after this period online tutorials will also be developed. The work will involve the following subtasks: -

- Set-up and launch of the Online Learning Support Facility – an instance of the platform will be set up by HATII using the experience held by this partner.
- Adding material to support face-to-face courses – partners involved in the organisation and delivery of events will populate the facility with pre- and post-course materials to support the face-to-face events. This will include online access to readings, exercises, course questionnaires and course materials.
- Development of online tutorials [after month 30] – as project outputs increase and the tools courses are prepared , partners will work to add online tutorials to the system, which will provide a complete learning experience on a particular tool or method. Partners responsible for the delivery of the technical courses have been allocated extra effort for the development of these tutorials.
- Quality Assurance – features which supply information on the use of the online tool and students' experiences will be activated. These will provide information for the evaluation of the training programme by task 6.6.

5. Task DT/6.6: Ongoing Evaluation of Training Programme

This task will provide the ongoing evaluation of the training programme and lay the foundations for longer-term assessment of its impact. The gathering of feedback and initial analysis will be carried out after each event as outlined in task 6.4. However, this task will use these early evaluations to produce periodic detailed analysis of the programme as a whole which will in turn lead to any alterations in the training approach. The online training support facility will also be assessed by this task. The main outputs of the task are periodical reports on the training programme at the end of each project phase. In order to complete these reports effectively the following subtasks have been identified: -

- Analysis of course evaluation forms – partners will assess the feedback gathered at events and the subsequent conclusions drawn. This will include detailed evaluation of course organisation, teaching methods, supporting documentation and promotional methods.
- Review of use of online tool – partners will use statistics produced by the online training facility to analyse use of the system. Questionnaires will also be issued to course attendees several weeks after their attendance of the event to gather feedback on their experiences in using the tool and any improvements they would like to see.
- Production of evaluation report – the information gathered and analysis carried out above will be consolidated in an end of phase report. The report will also provide a list of actions to ensure any issues highlighted are addressed and changes made accordingly.

6. Partner Effort Allocation

The following information outlines partner effort allocation for the training workpackage. Although effort up to month 19 was stated in the first DT/6 workplan, it has been provided again in this document with any necessary alterations. The remaining effort allocation outlined covers effort through to the end of the project. This is order to offer clarification for effort allocated to individual courses.

Remaining Work Allocation (m13-18)

Partner	BL	KB-NL	SB	KB-DK	ONB	NANETH	TNA	BAR	UzK	ALUF	WIEN	HATII	TESS	ARC	IBM	Total
Mths	0	0	1	0	0	1.3	0	0	0	0	1	1	1	0	0	**5.3**

Breakdown by task

	HATII	SB	NANETH	WIEN	TSS	Total time
Training Development	0.5	0.3	0.8	0.5	0.5	2.6
Training Delivery	0.5	0.7	0.5	0.5	0.5	2.7
Total time	1	1	1.3	1	1	**5.3**

Overall Work Allocation (m19-m48)

Partner	BL	KB-NL	SB	KB-DK	ONB	NANETH	TNA	BAR	UzK	ALUF	WIEN	HATII	TESS	ARC	IBM	Total
Mths	2	2	2	2	2	3	2	4	2	2	1	14	1	2	2	**43**

The following effort allocation is divided into two areas: firstly the effort required for the organisation and delivery of courses (task 6.4), and secondly the effort for workpackage support such as evaluation reports, maintenance of online tool and final scholarly papers. The effort for task 6.5 (development of online learning support facility) is divided between these two areas. This is in order to highlight the difference between effort for maintenance and evaluation of the tool, and effort for actually populating the facility with material to support face-to-face courses.

6.1 Training Delivery

Overall Effort Allocation for Delivery of Training Courses

	Course	BL	KB-NL	SB	KB-DK	ONB	NAN	TNA	BAR	UzK	ALUF	WIEN	HATII	TESS	ARC	IBM	Course totals
Spring 2008	Building PP's (1)	0.3						1				0.5	0.7	0.5			3
	Building PP's (2)	0.7						0.3				0.5	0.8	0.5			2.8
Autumn 2008	Evaluating in TB envir. (1)	0.5				0.5	1.2			1			1				4.2
Spring 2009	Evaluating in TB envir. (2)	0.5				0.5	0.8			1			1				3.8
	Tools for PP (1)										1		2.5		1	1	5.5
Autumn 2009	Process of PP in distrib. envir (1)		1		1.5		0.5	0.5					1				4.5
	Tools for PP (2)					1					1		1		1	1	5
Spring 2010	Process of PP in distrib. envir (2)		1		0.5		0.5	0.2	1				1				4.2
Partner totals		2	2	0	2	2	3	2	1	2	2	1	9	1	2	2	**33**

Effort Allocation for individual courses (1 month=20 days)

Building preservation plans (delivery 1, Spring 2008)

	TNA	WIEN	TSS	BL	HATII	
Organisation/logistics	8				5	
Preparation of presentations/course materials	6	6	6	2		
Contribution to online tools	4			2		
Attendance of event	2	4	4	2	4	
Gathering of feedback/evaluation of event					5	
Total	20 (1m)	10 (0.5m)	10 (0.5m)	6 (0.3m)	14 (0.7m)	

Building preservation plans (delivery 2, Spring 2008)

	TNA	WIEN	TSS	BL	HATII	
Organisation/logistics				10	7	
Preparation of presentations/course materials		2	2			
Contribution to online tools	2	4	4			
Attendance of event	4	4	4	4	4	
Gathering of feedback/evaluation of event					5	
Total	6 (0.3m)	10 (0.5m)	10 (0.5m)	14 (0.7m)	16 (0.8m)	

Evaluating and selecting preservation plans in a test-bed environment (delivery 1, Autumn 2008)

	NANETH	BL	UzK	ONB	HATII	
Organisation/logistics	10				10	
Preparation of presentations/course materials	7	5	10	5		
Contribution to online tools	4		5			
Attendance of event	3	5	5	5	5	
Gathering of feedback/evaluation of event					5	
Total	24 (1.2m)	10 (0.5m)	20 (1m)	10 (0.5m)	20 (1m)	

Evaluating and selecting preservation plans in a test-bed environment (delivery 2, Spring 2009)

	NANETH	BL	UzK	ONB	HATII	
Organisation/logistics			15		10	
Preparation of presentations/course materials	7	5				
Contribution to online tools	4			5		
Attendance of event	5	5	5	5	5	
Gathering of feedback/evaluation of event					5	
Total	16 (0.8m)	10 (0.5m)	20 (1m)	10 (0.5m)	20 (1m)	

The tools for preservation planning (delivery 1, Spring 2009)

	HATII	IBM	ALUF	ARC	ONB	
Organisation/logistics	30					
Preparation of presentations/course materials	10	10	10	10		
Contribution to online tools		3	3	3		
Attendance of event	5	7	7	7		
Gathering of feedback/evaluation of event	5					
Total	50 (2.5m)	20 (1m)	20 (1m)	20 (1m)		

The tools for preservation planning (delivery 2, Autumn 2009)

	HATII	IBM	ALUF	ARC	ONB	
Organisation/logistics	8			13	9	
Preparation of presentations/course materials		3	3		4	
Contribution to online tools		10	10			
Attendance of event	7	7	7	7	7	
Gathering of feedback/evaluation of event	5					
Total	20 (1m)	20 (1m)	20 (1m)	20 (1m)	20 (1m)	

The process of preservation planning in a distributed environment (delivery 1, Autumn 2009)

	KB-DK	KB-NL	NANETH	TNA	HATII
Organisation/logistics	20				8
Preparation of presentations/course materials	5	8	3	3	
Contribution to online tools		5			
Attendance of event	5	7	7	7	7
Gathering of feedback/evaluation of event					5
Total	30 (1.5m)	20 (1m)	10 (0.5m)	10 (0.5m)	20 (1m)

The process of preservation planning in a distributed environment (delivery 1, Early 2010)

	KB-DK	KB-NL	NANETH	TNA	BAR	HATII
Organisation/logistics		8			13	8
Preparation of presentations/course materials	3	5	3			
Contribution to online tools				4		
Attendance of event	7	7	7		7	7
Gathering of feedback/evaluation of event						5
Total	10 (0.5m)	20 (1m)	10 (0.5m)	4 (0.2m)	20 (1m)	20 (1m)

6.2 Training support and workpackage development

Overall Effort Allocation (months)

	HATII	BAR	SB	Task totals
Setting up and development of online support	2	1		3
Evaluation of courses/development of training programme	2	1	1	4
Scholarly papers	1	1	1	3
Partner totals	5	3	2	10

Effort Allocation (per month)

		2007	2008												2009												2010			
Task	Par	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
Setting up/development of online tool	HAT	0.3	0.2						0.2	0.3										0.5					0.5					
	BAR					0.3									0.2										0.5					
	SB																													
Evaluation/ development of training prog.	HAT												0.5							0.5				0.5	0.5					
	BAR								0.2				0.3							0.2					0.3					
	SB								0.3				0.2							0.3					0.3					
Scholarly papers	HAT																												0.5	0.5
	BAR																												0.5	0.5
	SB																												0.5	0.5