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Author(s)	Kellie Snow, HATII

Abstract

This document sets out the planned activity for Planets' DT6 Training Work Package in Year 4. It outlines changes to the original Planets Training Plan (DT6-D1), which was produced in Year 1 of the project and explains the reasons for revisions and a new combined DT6 Training and DT10 Outreach Programme.

Keyword list

Training, outreach, objectives, audiences, format, programme, organisation, administration, coordination, documentation, funding arrangements, evaluation, measurement, templates, online training materials.

Contributors

Person	Role	Partner	Contribution
Kellie Snow	Author	HATII	Composer of first draft
Laura Molloy	DT6 Participant	HATII	Commented on first draft
Jane Humphreys	DT10 WPL Sub Project Lead	BL	Review and reworking

Document Approval

Person	Role	Partner
Adam Farquhar	Planets Co-ordinator	BL
Raymond J van Diessen	SB Member	IBM

Distribution

Person	Role	Partner
Andrew McHugh	DT6 Work Package Lead	HATII
Vittore Casarosa	DT6 Participant	HATII

Revision History

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1.0	HATII	15/06/2009	Initial draft version for internal review
2.0	BL	22/06/2009	Reworked draft with additional appendices
3.0	HATII	23/06/09	Review and minor changes
4.0	HATII	11/08/2009	Final draft incorporating reviewer comments

References

Ref.	Document	Date	Details and Version
DT6-D1	Training Plan	June 2007	Final version

EXECUTIVE SUMMARY

This document sets out the planned activity for Planets' DT6 Training Work Package in Year 4. It outlines changes to the original Planets Training Plan (DT6-D1), which was produced in Year 1 of the project and explains the reasons for revisions and a new combined DT6 Training and DT10 Outreach Programme.

Section 1 describes the Training Work Package in the context of the Dissemination and Take-up Sub Project, the work completed to date and tasks for the final year of the project.

Section 2 discusses the original training plan and the reasons for the revisions that are now required. It looks at how collaborative work with other Work Packages and projects has affected the development of the training programme and led to the need for a revised plan.

Section 3 outlines the revised plan. It summarises the objectives of the new training programme, the structure, target audiences, teaching methodologies, programme and scheduled course dates and locations of the face-to-face training. It outlines plans for the development of online training materials.

Section 4 describes the mechanisms and documentation that will support the coordination, delivery and evaluation of the training events.

Appendices provide the detailed workplan (A) for the DT6 Work Package, plus templates and samples of materials to organise and evaluate events.

This document has been developed as a result of work undertaken by the DT6 Work Package and by and with the Planets Programme Manager, Sub Project Lead and the DT10 Leads.

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1   Introduction

This document sets out a revision to the original Planets training programme contained in the DT6-D1 Training Plan deliverable. It outlines the original training programme and how this has been affected by subsequent developments and the new training programme. The changes are based on the evaluations contained in the DT6-D2 and DT6-D3 Reports on Training in Year 2 and Year 3.

The Year 4 Training Plan describes the revised programme for Planets and covers the objectives of the training events, structure, audience, programme, schedule, organisation and administration, success criteria and their evaluation plus a note about the development of online training materials.

It is intended primarily as a source of reference for participants and project partners.

The document has been developed as a result of work undertaken by the DT6 Work Package Lead and by and with the Planets Programme Manager, Sub Project Lead and the DT10 Work Package Lead.

1.1   Aims and objectives of the training programme

The DT6 Training Work Package supports the objectives of the Dissemination Sub Project's to: -

1. Educate prospective users and suppliers about Planets and its role in supporting preservation of digital objects in institutions in Europe.

2. Equip prospective end-users and suppliers with the information and skills they need to adopt Planets and stimulate its uptake.

3. Equip suppliers and vendors of digital preservation tools and services with the information and skills they need to integrate their offerings into Planets or Planets within their offerings.

4. Inform stakeholders about milestones in the project about what they can do to take advantage of Planets in their organisations

5. Engage with end-users and suppliers to understand their needs and to inform development of the project.

6. Collaborate with other EU FP6 and digital preservation organisations to coordinate activity and communicate clear respective roles and responsibilities.

DT6 is specifically concerned with the imparting of information and skills among prospective adopters of Planets technology to: -

1. Build on the outreach activities in DT10 to equip prospective users of Planets such as national libraries and archives and other large content-holding institutions with the understanding, information and skills they need to adopt Planets methods, products and services.

2. Build on the supplier vendor activities in DT10 to provide prospective suppliers such as tools developers and vendors, systems integrators, repository service providers and consultancies with the information, understanding and skills they need to incorporate their offerings within Planets or Planets within their offerings.

3. Develop an Online Learning Support Facility to support face-to-face courses and to disseminate training in Planets to a broader community.

4. Promote collaboration with other EU preservation projects to streamline activity and optimise education about digital preservation in Europe.

DT6 has and will continue to work closely with the DT10 Outreach Work Package which is concerned with promoting awareness of, interest in and stimulating up-take of Planets outputs through face-to-face communication activities. The final training and outreach events will feature the case studies and demonstrations developed in the DT8 work package, if these are available. The face-to-face training will be extended by the creation of a set of online training materials. .

1.2   Work carried out to date

During the first three years of the project, the DT6 Work Package has planned the training programme and, in conjunction with DT10 and WePreserve, planned, organised, delivered and evaluated individual events. The main activities and achievements include: -

*   DT6-D1 training plan to underpin the roll-out of the training programme and design of events.

*   Training materials and templates to aid the organisation of events and production of course materials.

*   Five training events, delivered in collaboration with the DT10 Outreach Work Package, and the WePreserve collaborative forum:

- WePreserve Annual Training Event, Vilnius, Lithunaia, 1-5 October 2007
- Planning the Future with Planets, a Preservation Tutorial, Vienna, 14-15 April 2008 (with DT10)
- WePreserve Annual Training Event, Prague, 13-17 October 2008
- WePreserve Annual Training Event, Barcelona, 23-27 March 2009
- Digital Preservation – The Planets Way, Copenhagen, 22-24 June 2009 (with DT10)

In addition, the DT10 Work Package delivered

- Digital Preservation, Principles, Practice and the Future of Planets, London, 26 July 2008
- Supplier Vendor Briefing, Brussels, 3-5 June 2009

- Detailed evaluation of each event and consolidated annual summaries (DT6-D2 and DT6-D3).

1.3   Tasks for final year of project

The outcomes of evaluation of activities in Years 1 – 3, feedback from participants and speakers and the evolution of the project and its outputs have led to re-assessment of the original aims and a revision to the Training Plan for the final year of the project.

In Year 4, DT6 will deliver: -

- DT6.1 **Work Package Management** – plan, report, co-ordinate activities

- DT6-T5 **Revised Training Plan** – (this document)

- DT6-T6 **Training Programme Rollout** – a further four training courses in close collaboration with the DT10 Work Package and other FP6 projects

- DT6-T7 **Development of Online Learning Support Facility** – create and disseminate a prototype training video and other materials for use on the Planets and partner organisations' websites

- DT6-T8 **Ongoing Evaluation of Training Programme** – evaluation of each course's organisation and delivery, a mid-year and end of project assessment of the long-term impact of the training programme

Appendix A: Work Plan gives a detailed breakdown of partner effort, tasks, outputs and timelines.

2   Evaluation of Original Training Plan (DT6-D1)

The Planets Training Plan (DT6-D1) was produced in Year 1. It aimed to provide the basis for a dynamic and extendable educational framework that would be developed throughout the remainder of the project. This section discusses the original plan and the revisions that will be made from evaluation of training that has taken place.

2.1   Review of the original plan

Target audiences - Training has been targeted from the outset at researchers in digital preservation, libraries and archives and other large content-holding institutions in Europe. Training was also designed to be targeted at suppliers and institutions of digital preservation tools and services.

Subsequent work carried out in Year 3 as part of the DT10 T2 (Messages and Milestones Document) task has led to clearer definition of Planets' target audiences. As a result Planets DT activities, including training, can now be focused more precisely by institution type, job role and geographical territory. Section 3.3 contains a summary of target audiences for Year 4. An analysis will be carried out as part of the External Communications Plan for Year 4 which describes the extent to which different regions in Europe are engaged in digitisation and digital preservation initiatives.

Programme structure – The Training Plan was conceived to be modular and comprise 15 self-contained units that could be delivered independently or in combination with other modules. The approach was designed to be flexible to suit the needs of different user groups. Original modules ranged from half day overviews of the Planets approach to two day technical tutorials on aspects of the Interoperability Framework.

The modular approach was rolled out during early Planets training events with the use of the more general modules and worked well as part of collaborative courses with other projects.

Subsequent feedback and development of Planets technology has meant that the project outputs can now be presented as a single suite of tools and services to support digital preservation activities. The 15 original modules have been consolidated into six modules and two new modules introduced to show how Planets may support digital preservation as part of general business and risk management.

Training methodologies – Face-to-face training was identified as being central to Planets Dissemination and Take-up as a means to enable adoption of the technology among prospective users and suppliers. This continues to be the case. Thirty-two per cent of respondents in the

recent DT1-D11 Market Survey identified conferences and training events as their primary source of information about digital preservation.

The original Training Plan identified a range of training methodologies that included: large group lectures and exercises for general courses, and small hands-on group training such as tutorials and case-based activities for more technical modules. In practice, early training was delivered as lectures supported by practical exercises. Feedback has indicated that delegates see a broader range of methodologies including a greater focus on demonstrations, practical activities and problem-solving/discussion. This has been incorporated into the Year 4 Plan.

Online training - During years two and three of the training programme a Planets Moodle Virtual Learning Environment (VLE) was established as a vehicle to deliver online pre- and post-course training for individual events and potentially more complete online tutorials as tools and services were finalised. This was intended to compliment the Moodles that were also to be used by DPE and CASPAR and to help ensure symmetry across the FP6 projects' training programmes.

Early Planets courses formed part of collaborative events. The majority of online materials were made accessible through the Wepreserve Moodle. However, many delegates were not familiar with the Moodle software and some found it inconvenient to spend time mastering navigation and use of the site for the purpose of pre-training for a short event. Consequently, the use of the pre-training material was lower than anticipated. The use of alternative online training methods will be introduced to support the Year 4 training events.

Course differentiation - Early courses were divided into those that focused on raising awareness of digital preservation issues among senior managers; processes to enable practitioners to preserve collections, and instruction in Planets infrastructure and technical tools to enable vendors and developers to wrap their tools and services within Planets or incorporate Planets within their tools and services. Early courses largely targeted the user community and promoted an understanding of the issues relating to digital preservation. This has substantially raised awareness about the need to preserve digital content. Ninety-three per cent of respondents to the Planets Market Survey said their organisation was aware of the need to manage digital information for the long-term. The survey indicates that potential end-users of Planets now seek courses that will equip them with tools, knowledge and skills to implement practical solutions in their organisation.

Work to target suppliers and vendors has taken place in DT10 in Year 3. It is envisaged that the final training event in Rome in Year 4 will build on initial contact made with suppliers and vendors this year to provide specific promotion of and training in Planets to this community through a twin-tracked event.

Number of courses and locations – Ten courses were planned over the project in locations throughout Europe. As a result of feedback from Planets participants, DT6 training events will now take place simultaneously with DT10 Outreach events. Nine courses will now be delivered.

Courses to date have been held in Vilnius (Lithuania), Vienna (Austria), London (England), Prague (Czech Republic), Barcelona (Spain) and Copenhagen (Denmark). The remaining four courses will be held in SE Europe (Sofia, Bulgaria), Central Europe (Zurich, Switzerland), Western Europe (London, England) and Southern Europe (Rome or Pisa, Italy).

Promotion techniques – Courses were initially promoted via mailing lists, announcements in the Planets and partner newsletters, web-logs and online event listings. Work as part of DT10 T3 (Contact Databases) and DT10 T4 (User Recruitment Campaign) has established a Planets User Community with 350 members, a Contact Database with 1000 contacts in National Libraries and Archives in Europe, a Planets Mailbox subscribed to around 300 mailing lists and an Outreach and Training event flyer. Events in Year 4 will draw on these dissemination channels.

Course design – The plan set out the resources that would be required to organise, deliver and evaluate a training course. This included forms, checklists and templates and a Quality Assurance process. A comprehensive set of templates was subsequently developed to support organisers and speakers at training events. These have been built on in DT10 to support recent DT6 Training and DT10 Outreach events and are presented here as a basis for templates to support activities in Year 4.

2.2   Evaluation of delivered training events

Early training events and participation as part of the WePreserve forum concentrated on the lecture and exercise format to provide overviews of the Planets approach. Feedback from courses delivered in Years 1 – 3, and summarised in the DT6-D2 and DT6 D3 deliverables, (Report on Training Courses) indicated that delegates value:

- Internationally-established lecturers with the authority to provide an effective introduction to digital preservation.

- Practical hands-on teaching sessions and interactive brainstorms and discussions in addition to lectures and demonstrations.

- An opportunity to exchange ideas with lecturers and other participants in order to develop knowledge of key principles and issues.

- Early sight of recommended reading and pre-course exercises so that participants can prepare fully for the event.

- An opportunity to socialise and network informally with delegates from a variety of backgrounds (job roles and institutions).

Training events in Year 4 will embrace this feedback and offer a wider range of teaching methodologies.

2.3   Other developments in DT6 and impact on the training plan

2.3.1   Collaboration with FP6 projects

Planets DT6 Work Package has worked closely with other digital preservation projects to combine resources and consolidate the number of digital preservation training courses offered to organisations (see section two of DT6-D1). This led to the WePreserve forum that brought together the FP6 projects of Planets, DigitalPreservationEurope and Cultural, Artistic and Scientific Knowledge for Preservation, Access and Retrieval (CASPAR), the Digital Curation Centre and Nestor projects. The WePreserve training courses have provided an introduction to digital preservation, and highlighted developments in the individual projects. Participation by Planets has enabled the project to raise the profile of its tools and services and provide the necessary background knowledge to understand the significance of digital preservation. The courses have laid the foundations for more extended and Planets-specific events in Year 4.

2.3.2   Work with DT10 Outreach Work Package

Collaboration between DT6 and DT10 has been fundamental to the development of the Planets training programme. The DT6 Training Work Package worked closely with the DT10 Outreach Work Package to deliver the first combined DT10 Outreach and DT6 Training event in Vienna in April 2008 and has subsequently taken part in monthly DT10 calls to streamline activity. The successful format of the Vienna event led to a proposal in the Year 3 Outreach Plan that the two Work Packages combine effort to deliver events to promote interest in Planets and equip delegates with the information and skills to implement it. The proposal regarded streamlined events as a more efficient and effective use of Planets resources. This was taken forward at a DT10/DT6 workshop in London in February 2009.

Significant work has since been undertaken by the two Work Packages to combine ideas and objectives and to develop a joint programme for Year 4. This is described in Section 3.

3   The Planets Outreach and Training Programme

3.1   Overview

The DT6 Training programme for Year 4 will deliver a series of five three-day combined DT6 Training and DT10 Outreach events in five locations across Europe in conjunction with effort from institutions on the Work Package and participants known as Local Hosts in the DT10 Work Package. In addition, it will lead to the development of online training materials.

These aim to demonstrate Planets as an integrated, viable and valuable set of tools and services to support the planning and long-term management of digital information by users and commercial provider of such offerings.

3.2   General Objectives

The objectives are derived from the Terms of Reference for Planets Training events developed at the DT10/DT6 planning workshop in London 26 February 2009 and contained in Appendix B.

Delegates on day one should leave with:

- An understanding of why to preserve digital content and its role in general risk management and the issues and challenges involved.
- An introduction to the preservation planning cycle, Planets framework, technology, tools and services and what they have to offer.
- An insight into how one or more organisation(s) are practically approaching preservation of digital content.
- An opportunity to engage in discussion, share ideas and best practice and to build contacts with colleagues in organisations with a need to preserve digital content.

Delegates participating in days two and three of the event should additionally leave with:

- Practical skills to start to plan to preserve digital content and to use Planets tools and services through training and hands-on practical exercises.
- An ability to visualise how Planets may work within their digital preservation strategy and activities and an understanding of how to adopt Planets in their organisation.
- An opportunity to ask questions and provide input for further developments of Planets technology.

Suppliers and vendors will leave the final training event with:

- Awareness of the potential commercial advantages to them of exploiting Planets investment into Research and Development to distribute their own tools or services more widely or to incorporate Planets within their offerings.
- Practical information and skills that will enable them to integrate their tools and services within the Planets framework or to work with Planets to integrate Planets within their digital library services and systems.
- A clear understanding of who they should contact and how they can explore and realise commercial opportunities with Planets.

3.3   Target audiences

The primary audiences for Planets include prospective users of Planets in:

- Planets Consortium partners (content-holding) and their partners (eg. government)
- European National libraries and national archives
- Large data-holding institutions in Europe

There are three target groups in each organisation type:

- CEOs or Heads of IT (strategic/commercial – who are concerned with aspects of digital preservation and Planets solution)
- Heads of Preservation or Conservation (conservation/library/archive background – who are concerned with practical solutions to preservation and benefits of using Planets)
- Digital Preservation Manager / Repository Managers (technical/IT stream – who are concerned with Planets technical solution and how it will work with their IT infrastructure and in their organisation)

Additionally, audiences may include:

- Researchers in digital preservation institutions or projects
- Others with an interest in digital preservation eg. publishers and trainers
- Members of the European Commission

The final training event in Rome / Pisa will include sessions that target supplier groups including:

- Digital Library Software suppliers and vendors
- Tools suppliers and vendors

- Systems integrators
- Consultants

This event will target CEOs, Heads of Strategy, Development and Product Managers in these organisations.

3.4 Messages

Tables 1 and 2 summarise the target audiences for the Year 4 Training programme and build on those defined by the DT10 T2 Messages and Milestones document. They summarise the core objectives with each audience.

Table 1 outlines the knowledge and skills the Work Package wishes prospective users to gain from the training events

User Type (Job Title)	Background	Learning Outcomes
CEO/Head of IT	Strategic/commercial	- Awareness of issues surrounding long-term preservation of digital content - Realisation of potential impact for own organisation - Recognition of Planets as a potential and realistic solution for own organisation
Head of Preservation or Conservation	Conservation/library/archive	- Awareness of practical solutions to preservation and the benefits of Planets - Recognition of need to commit people and resources to digital preservation - Recognition of Planets as a potential and realistic solution for own organisation - Understanding of how Planets could be built into own preservation strategy and how this can approached
Digital Preservation Manager/Repository Manager	Technical/IT	- Understanding of Planets tools and services - Understanding of how Planets could successfully work with IT infrastructure in own organisation - Knowledge of how Planets will work on a practical level and the steps to be taken for adoption
Digital Preservation	Researchers	- Awareness about the latest developments in the project - Understanding of Planets and how its outputs may be extended through future Research Development

Table 2 outlines the knowledge and skills the Work Package wishes prospective suppliers and vendors to gain from the final training event.

Type (Organisation)	Background	Learning Outcomes
Digital Library Software Vendor	CEO Head of Strategy Development Manager Product Manager	- They and their clients can benefit from Planets investment of €15million into Research & Developmen - Planets provides access to a wide range of third-party digital preservation tools and services throug single open-source installation - The preservation component of their system can be powered by the Planets engine - Planets is a safe, secure, trusted and affordable route to preservation of digital content
Digital Preservation Tools Providers	CEO Head of Strategy Development Manager Product Manager	- They and their clients can benefit from Planets investment of €15million into Research & Developmen - Planets provides their tools with instant access to a wider market of repository service providers - Planets provides them with opportunities to develop new business and distribution models - Planets is a safe, secure, trusted and affordable route to preservation of digital content
Systems Integrators	CEO Consultant championing digital preservation Development Manager	- They and their clients can benefit from access to €15 million of Research & Development - They can benefit by providing consultancy and integration services to tailor Planets to meet clie individual circumstances - Planets is a safe, secure, tested and affordable route to preservation of digital content - By linking their systems to Planets interfaces, they can give their clients access to Planets dig preservation tools and services
Consultancies	CEO Consultant championing digital preservation	- They and their clients can benefit from access to €15 million of Research & Development - They can benefit by providing consultancy services to tailor Planets to meet clients' individ circumstances - Planets is a safe, secure, trusted and affordable route to preservation of digital content

3.5   Training methodologies

The Year 4 Training Events will include a wider range of teaching techniques to address the issues identified by feedback:

- **Lectures and marketing presentations** – these will be used in large group sessions for both the introduction of a training topic and to raise awareness of Planets products and services.

- **Demonstrations** – these will be used to showcase the more technical aspects of Planets and to demonstrate how features work in practice.

- **Practical hands-on exercises** – short exercises will be used in combination with lectures to develop skills.

- **Case studies** – at least one case study demonstrating how an organisation in the region has successfully developed a policy and activities to manage digital information for the long-term.

- **Speaker panels** – speakers will answer questions and offer views on individual cases and problems. The technique offers an interesting alternative to other teaching methods, keeping the audience's attention and demonstrating the variety of approaches to a topic.

- **Scenarios** – these will be used in group sessions where students will work through scenarios in order to understand the application of various tools and services. It is hoped that exercises will come to be based increasingly on a real-life example or collection.

- **Social networking** – there will be an opportunity to establish contacts with colleagues involved in preserving digital content and gain an insight into issues from different perspectives. This will include a social event for all delegates at the end of day one and two.

- **Facilitated discussions** – these will offer the opportunity for students to feedback on what they have seen and heard, present their views and to pool ideas and experience.

By drawing on a variety of approaches each course should address feedback and provide a stimulating and diverse environment through which to learn about the Planets approach and products.

3.6   Programme structure

The content of the programme has been developed in the light of responses to the DT11 D1 Market Survey of over 200 institutions in Europe and the initial analysis of responses at the Supplier Vendor Briefing held in Brussels on 3-4 June 2009. These indicate a high degree of interest in Planets overall (80 per cent awareness of Planets) and specifically in Planets tools for preservation planning,

characterisation, migration and to a lesser degree emulation, the Planets testbed, service framework and in Planets work to develop technical and metadata standards. Respondents also indicated a high level of interest in receiving up-to-date information about digital preservation.

3.6.1   Modular approach

The original 15 modules have been consolidated into 6 broader modules to provide an introduction to the components of Planets and the ways in which these support long-term management of digital information. The revised modules are: -

Topic 1: Digital preservation and the Planets approach (include Planets 1 and 2)

Topic 2: Preservation planning decision support tool – Plato (include Planets 3, 4 and 5)

Topic 3: Preservation actions (include Planets 6, 7 and 8)

Topic 4: Characterisation framework (include Planets 9)

Topic 5: The testbed environment (include Planets 10 and 11)

Topic 6: The Planets interoperability framework/architecture (include Planets 12, 13, 14 and 15)

Two further contextual modules have been introduced:

Topic 7: The business case for preserving digital content

Topic 8:   The role of digital preservation in risk management

3.6.2   Proposed course programme

Day one will constitute the Outreach aspect of the event. It seeks to promote interest in Planets among all attendees by setting out the business case for digital preservation, how digital preservation fits into a risk management approach, the issues and challenges associated with long-term management of information, and Planets as a viable solution. Day one will be supported by formal discussion and an informal networking event to encourage exchanges of viewpoints.

Days two and three will form the training part of the event offering digital preservation managers the opportunity to gain hands-on experience of the various Planets tools and an understanding of how the system could be integrated into their own organisation. Days two and three will include discussion about how to determine organisational requirements, plenary sessions to share ideas and a facilitated discussion that enables delegates to inform Planets about their experiences and how Planets may or may not meet their requirements.

Appendix C2 sets out the core programme. Adjustments will be made for each event based on its individual focus (e.g. varying regional case studies), speaker availability, development of Planets components, specific tools eg. SIARD or emulation and results from the previous course.

3.6.3   Schedule

The original training plan proposed 10 events over the duration of the project, with five courses having been delivered as part of the collaborative events with WePreserve and DT10. A further four will be delivered (totalling 9 events overall) with DT10 at a variety of locations in Europe. This is intended to ensure accessibility to Planets training across Europe and to tailor events to include a regional focus.

Date	City and Country	Geographical coverage	Targeted Countries
June 2009 (22-24)	Copenhagen, Denmark	Northern Europe	Denmark, Norway, Sweden, Finland, Iceland, Estonia*, Latvia*, Lithuania*, Poland*, Germany*, Netherlands* and Belguim*
September 2009 (21-23)	Sofia, Bulgaria	Eastern Europe	Austria*, Belarus, Bulgaria, Czech Republic*, Bosnia-Herzegovina; Estonia, Hungary*, Latvia*, Lithuania*, Macedonia, Moldova, Poland*, Romania, Russia, Serbia*, Slovakia, Ukraine, Greece*, Albania*, Slovenia*, Croatia*.
November 2009	Bern, Switzerland	Central Europe	Austria*, Bosnia, Croatia, Czech Republic*, Germany*, Hungary*, Liechtenstein, Poland*, Slovenia, Switzerland, Italy*, France*, Monaco*, Belguim*
January/February 2010	London, UK	Western Europe	Belgium*, France*, Germany*, Ireland, Netherlands*, Luxembourg, UK, Spain*, Portugal*, Italy*, Switzerland*, Austria

Date	City and Country	Geographical coverage	Targeted Countries
March/April 2010	Pisa/Rome, Italy	Southern Europe	Albania, Andorra, Greece, Italy, Monaco, Montenegro, Macedonia, Malta, Portugal, San Marino, Spain, Turkey, Bosnia-Herzegovina*, Croatia*, Slovenia*, Serbia* * = included in more than one geographical area

3.6.4

3.6.5 Collaborative training opportunities

The DT6 Work Package will continue to support wider opportunities for Planets such as placement of Planets speakers at training events organised by external partners such as WePreserve and collaborative online training. The Work Package lead HATII is particularly well placed to explore such possibilities, being closely involved with the DPE and CASPAR training programmes as well as all partners in WePreserve.

3.7 Online Training

The Planets training programme has recognised since the outset the value of online training materials, in supporting face-to-face events and providing a lasting legacy to the Work Package and the project itself. The original training plan outlined the potential for a Virtual Learning Environment to deliver initial pre and post-course training materials, with the intention that further avenues would be explored as tools and services were completed. It is therefore in the final year of the project that these aspects of the Work Package can be fully developed.

3.7.1 Use of Moodle in dissemination of online training materials

The amount of time required to master the Moodle could deter delegates attending single training events from using it. In Year 4, there is greater emphasis on practical exercises during the events themselves. The role of the pre- and post-course materials is then to introduce key concepts in digital preservation and reinforce the learning that has taken place during the face-to-face tutorials. It is also to make training available to a wider audience. Advances over the four years of the project have also opened up new opportunities to use video or other multimedia technologies for training purposes and

to disseminate materials through channels such as YouTube. The end-of-project portal proposed in the PM4 Project Closure Work Package PM4 will provide an ideal platform for the online training materials to be located alongside the other outputs of the project instead of in a separate training VLE.

3.7.2   Online training activities for Year 4

The online training task (DT6-T7) will carry out the development of online training materials for the final year of the project. Pre- and post-course reading materials for the Outreach and Training events will primarily consist of background reading lists, with more detailed exercises performed during the events themselves. The reading lists will be made available through private pages of the Planets website, and delegates will be sent links to the pages in the weeks leading up to the event (see section 4.6).

As the Planets project enters its final year and a more complete collection of tools and services is available, the Work Package will begin work on developing a 'suite' of online training materials, which will be added to the Planets portal at the end of the project. The key anticipated outcome of this activity is that materials will be produced that can outlive the project itself, potentially being used by a wide variety of audiences in order to understand the Planets digital preservation approach.

The materials produced for the training events (and currently only available to course attendees) will be edited and presented in formats which make them accessible and understandable to a wider audience. This will include:

- Collating presentations from training event sessions
- Editing event exercises to create online tutorials for students to work through
- Creating a definitive reading list developed from the pre- and post-course reading

The Work Package will investigate, subject to the time allowed for the task (1.5PM) being adequate and the funding available in the Planets training budget, the option to use video to support the online training materials. The precise format and content of these videos will be agreed as project tools are finalised, but may include for example:

- Edited highlights of presentations/demonstrations delivered at one of the later training events
- A video walkthrough of particular aspects of the Planets system narrated by a Planets expert

4   Organisation, administration and promotion

4.1   Overview

The DT6 Work Package and five training events will be driven and coordinated by the DT6 Work Package Lead based at HATII. DT6 will be able to draw on the support of Local Hosts with effort in DT10. DT6 will additionally draw on effort of institutional participants on DT6 for speakers.

As the Local Host will be different for each training event it is important there are clear terms of reference to underpin the coordination of training events, administrative procedures to support the funding arrangements and documentation to ensure continuity in approach across the Training Programme. The DT6 Work Package developed two packs of templates to support training activities in Years 1-3 as part of the DT6 D2 task. The Sub Project Lead and DT6 Work Package Leads have worked together to develop terms of reference, administrative systems, documentation arrangements and an evaluation mechanism to support the revised Training Programme. They are described below with references to supporting appendices and examples taken from the combined training event held in Copenhagen on 22-24 June 2009.

4.2   Co-ordination of Work Package effort

The DT6 Work Package will be led in Year 4 by HATII which has 1.5PM of effort per event assigned to it.

DT6 can draw on the support of 1.5 to 2PM of effort of DT10 partners or Local Hosts per event. It will draw on their support to source the venue, develop the event and hospitality locally, draft event communications, promote the event, set up the event with the venue, run the event on the three days and evaluate the event.

HATII can draw on small amounts of effort from a large number of partner institutions within Planets. To support the revised Training Programme, DT6 will work with participants in the Work Package to ensure that adequate effort is made available to participating partners to take part in training events.

Their effort will enable them to attend event calls, prepare their sessions, develop supporting materials including pre and post-course reading and attend the event.

Detailed roles and responsibilities are set out in Appendix B2 Division of Labour document.

4.3   Administration and financial arrangements

Planets has set aside a budget of €71000 to fund Planets Training activities for Year 4 of the project. .This budget is administered by HATII. A set of procedures has been developed by the Sub Project Lead and Project Manager with DT6 and DT10 to underpin the administration of this budget. These arrangements have been communicated to Scientific Board members, Sub Project Leads, institutional Finance Administrators and speakers as part of the first combined DT6 / DT10 training event.

The DT6 Work Package lead will manage the budget for the Planets training programme. They will require the Local Host to develop a budget for their event which is approved by the DT6 Work Package and the Sub Project Lead. They will set up and monitor the account for each event. They will obtain details of suppliers from their Local Host and ensure that suppliers' and speakers' expenses are reimbursed. An account summary and summary of the status of the overall training budget will be submitted to the Sub Project Lead within one month of the end of each event.

Detailed arrangements are contained in Appendix B3.

Arrangements to register delegates have been outsourced to a professional registration services provider as the administration costs proved cheaper and the logistics simpler than administration by a Planets institution.

4.4   Organisation of events

The Sub Project Lead, DT10 and DT6 Work Package Leads have developed documentation arrangements to ensure that there is consistency of approach across the training programme. A dedicated Planets DT Sharepoint has been created to enable all participating partners to share documents of common interest and to support event planning. The Product-based Plan (Appendix B4) provides an overview of the process for ensuring the effective delivery and evaluation of each event. Each event is supported by a Gantt Chart (Appendix B5) created by the British Library and which sets out the tasks that must be delivered, the dates by which they must be delivered and the responsible partner in line with the Division of Labour document. Events are documented as follows:

Gantt charts (Appendix B5) – The British Library has a developed detailed Gantt chart for each event. These describe individual tasks for each partner, the start dates and estimated duration and critical milestones. The charts have been made accessible via the Sharepoint site to enable individuals to record progress on individual tasks and also to upload related documents for review. The system allows all partners involved in the event's organisation to stay updated on its progress despite being widely dispersed geographically. These may be used by the DT6 Lead or Local Host to create a simpler at a glance timetable (Appendix C4).

Proposed event plan and programme (Appendix C1 and C2) - This provides a summary of the scheduled event, including an event outline, target groups, objectives and format, programme, communication and evaluation. The document is produced by the Work Package Lead with the assistance of the Local Host and submitted to the Sub Project Lead for approval before detailed preparations begin for an event. It is the basis for discussion with Sub Project Leads and speakers.

Proposed budget plan (Appendix C3) – This outlines the event costs against revenue and is used as the basis for calculating delegate fees. The document is produced by the Local Host following research into potential event and hospitality venues, and will be approved by the DT6 Work Package lead and the DT Sub Project Lead. Local Hosts are encouraged to visit the prospective venue(s) to ascertain their suitability and seek out local knowledge about the opportunities for social activities and alliances to promote the event regionally.

4.5   Promotion of events

Planets has established a detailed Contact Database of around 1,000 contacts, a Planets News mailbox subscribed to around 300 mailing lists, and a Planets User Community of over 350 contacts. The DT6 Work Package will draw on these and other channels to promote training events. All communications are drafted by the Local Host and reviewed and approved by the Work Package and Sub Project Lead.

Pre-announcement (Appendix D2) - The announcement of each event is made to the Planets User Community at least <u>eight weeks prior to the event</u>.

Web-announcement (Appendix D2-4) and News Bulletin (Appendix D5) - After one to two weeks, and at least <u>six weeks prior to the event</u>, the event is publicised via the Planets website, partner websites and mailing lists. The web text contains the event Home Page, Programme, Session Abstracts, Biographies, Registration, Hotels and Restaurants and Pre-Reading pages.

Three Mailings (Appendix D2-D4) - Each event will be promoted via three mailings or calls to participate.

News Bulletin (Appendix D5) - A short news bulletin is placed on the Home Page of the Planets website.

Mailing Lists (Appendix D6) - Communications are disseminated via the Planets News mailbox to relevant mailing lists among the 300 to which the Planets mailbox is subscribed. The Local Host will research region-specific mailing lists to target mailings locally. Mailings are also posted to partner web-sites, relevant Event Boards and web-logs. Mailings are sent to Scientific Board members and personal contacts.

Flyer (Appendix D7) - The British Library has developed a flyer to promote the event series.

4.6   Delegate materials

Attendees to a training event will be provided with a variety of information before, during and immediately after an event. The following is a list of materials which delegates will be supplied with in order to support their learning experience.

Pre-event questionnaire (Appendix E1) – This document will be used to gain more information about the attendees and their needs and expectations in order for speakers to tailor sessions to individual requirements. It is prepared by the Local Host and circulated to delegates with input from the Work Package lead. The DT6 Work Package Lead prepares a summary of the results of the pre-questionnaire which is provided to speakers to enable them to tailor their sessions to delegates' level of experience and stated expectations of the event.

Pre-reading list (Appendix E2) – The pre-reading list is developed by the DT6 Work Package Lead with speakers and made available online to attendees before the course. It provides background reading that prepares them for the topics of the training course.

At the events themselves further materials will be required to ensure effective delivery: -

Delegate packs (Appendix E3) – These contain copies of the event programme, session abstracts and speaker biographies, along with a delegate list and any materials required for specific sessions. They are produced by the Local Host.

Logistics plan – this is optional and produced by the Local Host. It sets out a timeline of tasks during the event and is a basis for briefing organisers to ensure they are well prepared and complete all necessary tasks during the event.

Sign-in sheets and badges – these allow organisers to carry out successful registration at the start of the event.

4.7   Event evaluation and success measurement

The Sub Project has a set of criteria in place which are used to measure the success of individual events and can be used to ensure continuity across the Training Programme. Feedback Forms are analysed after each event and an Evaluation Report produced which informs subsequent developments to the training programme.

Success criteria	Measurement/assessment
Delegate attendance: - 50 or more on day one - 30 or more on days two and three	Registration records
70 per cent of attendees rate event as good or better against each of the event objectives	Feedback form
70 per cent of attendees rate the event as good or better in meeting their expectations	Feedback form
70 per cent of attendees rate each of the organisational components of event design as good or better	Feedback form
70 per cent of attendees represent target sectors	Pre-questionnaire
70 per cent of attendees represent target job roles	Pre-questionnaire

The results of the success criteria for each event will be discussed through the following reports: -

Evaluation Plan (Appendix F1) – The Evaluation Plan is developed by the Local Host and sets out the success criteria that will be measured. These relate to the objectives contained in the original Event Plan and also cover organisational criteria and individual sessions. The Evaluation Plan contains the Feedback Form for the event and is circulated to speakers prior to the event.

Feedback form (Appendix F2) – Attendees will be provided with a feedback form that will allow them to score the overall event and individual sessions against their objectives using a five-point scale. A standard form has been designed and will be distributed by organisers at the end of the event. These are produced by the Local Host.

Evaluation Report Appendix F3) – This is a report developed by the Local Host from feedback. It sets out how far the event met objectives using scores against a five point scale where 1 is poor and 5 is excellent. It also includes qualitative comments and an overall evaluation and recommendations for future events.

A final evaluation of the success of the training programme will be provided through the DT6-D5 deliverable, Training Final Evaluation Report, in m47.

5   Conclusions

The original training plan outlined a vision for the Planets training programme that would enable a dynamic and extendable educational framework to be developed. This document has highlighted how subsequent developments both within the DT6 Work Package and the wider project have confirmed the success of the original plans and emphasised how necessary revisions will ensure the programme continues to meet its original aims during the final year of the project.

The revised training plan aims to provide the clarity necessary to deliver a detailed and successful programme through both organised events in Europe and online training opportunities. The document offers a complete reference source for the DT6 Work Package and will provide a framework for the training partners throughout the remainder of the Planets project.

Appendix A   DT6 Year 4 Workplan

Project Number	IST-2006-033789
Project Title	Planets
Work-package	DT6 Training
Document	Workplan m37-48
Author(s)	HATII

1. Description of Work

The goal of the DT6 Training Work Package is to deliver an educational framework for the Planets project. It aims to equip user and supplier communities with the knowledge, understanding and skills they need to adopt Planets or to integrate products and services into the Planets framework.

The overall objectives of the Work Package are:

- Maximise take-up of Planets by providing a link between the innovations of the project and their exploitation and adoption by user and supplier communities
- Offer learning opportunities to staff in priority institutions to promote the take-up of Planets methods, practices and technologies
- Provide capability building training for consultancies, technology developers, and vendors
- 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

A significant amount of work has taken place over the first three years of the project, including the production of a training plan, design of course materials, delivery of five training courses, and the establishment of a Planets Moodle virtual learning environment. More recently DT6 and DT10 (Outreach) have combined effort and resources to develop the Planets Outreach and Training Programme, which will deliver the remaining Planets training courses during the final year of the project. The specific objectives for m37 to m48 are:

- Deliver a series of training events to both ALM institutions and developers and vendors
- Develop an Online Learning Support Facility to offer support for face-to-face courses and more dedicated online training tools
- Collaborate with EU preservation projects to develop and deliver complementary training programmes for the European community
- Evaluate potential value of creation and delivery of online training materials, taking advantage of video and other multimedia technologies

In order to meet these objectives a number of tasks and deliverables have been outlined:

DT6.1 Management of Work Package
DT6-T5 Revised Training Plan
DT6-T6 Training Programme Rollout
DT6-T7 Development of Online Learning Support Facility
DT6-T8 Ongoing Evaluation of Training Programme

DT6-D4 Revised Training Plan (m37)

DT6-D5 Training Final Evaluation Report (m47)

2. Partner Effort Overview

The following outlined effort covers the final year of the project. As some of the partners originally allocated effort in DT6 will not be involved in the events of the final 12 months, the effort outlined is a revised allocation as seen in the implementation plan for months 37-48. The figures are in development.

Overall Partner Effort Allocation for m37-m48

Partner	BL	KB-NL	SB	KB-DK	ONB	NANETH	TNA	BAR	UzK	ALUF	WIEN	HATII	TSS	ARC	IBM	Total
Mths	1.25	1.25	0	0	1.25	1.25	0	1.25	1.25	0	2.5	13.5	0	1.25	0	**24.75**

In addition, the following partners from the DT10 Work Package will contribute 1.5PM each to the organisation of the training events:

SB (Copenhagen event)

ONB (Sofia event)

BAR (Bern event)

TNA (London event)

BL (Rome/Pisa event)

Breakdown by tasks

Task	Partners	Effort (PM)
DT6.1 Management of Work Package	HATII	0.5
DT6-T5 Revised Training Plan	HATII	0.5
DT6-T6 Training Programme Rollout	HATII	10
	BL	1
	KB-NL	1

	ONB	1
	NANETH	1.5
	UzK	1.5
	WIEN	1.5
	ARC	1
DT6-T7 Development of Online Learning Support Fcility	HATII	1.5
DT6-T8 Ongoing Evaluation of Training Programme	HATII	1.5

3. Work Package Tasks and Breakdown of Effort

Task DT6.1 – Management of Work Package

This task will ensure the overall management of the Work Package and the coordination of all the other tasks. The training Work Package has a large number of partners who are all simultaneously carrying out various tasks, and therefore supervision of these numerous activities is essential. The following sub-tasks are envisaged:

- Management of the Work Package – ensure timely delivery of tasks, deliverables, milestones and training events
- Work Package planning – produce workplans detailing tasks to be completed, partner effort allocation and timeframes
- Coordination activities – coordinate the variety of training activities taking place including the simultaneous organisation of a number of training events
- Budget management – oversee the Planets training budget and develop arrangements to fund training activities
- Report production – deliver Work Package activity plans, highlight reports and any other documentation as required by the Sub Project Lead or Project Manager

Effort Allocation

Partner(s)	Effort (PM)	Responsibilities
HATII	0.5	• Manage DT6 Work Package to ensure timely delivery of tasks and deliverables • Maintain regular communication between DT6, the DT SPL and other parts of the project

		• Manage the delivery of all aspects of the five three-day training events
		• Put in place and communicate the arrangements to fund Planets training
		• Administer the account to fund training activities
		• Provide support for training activities carried out in non-DT6 Work Packages
		• Participate in calls to coordinate training activity with partner projects
		• Coordinate the provision of Planets speakers for external training
		• Update DT6 wiki
		• Produce the 6-monthly progress report (DT6-D5)

Task DT6-T5 – Revised Training Plan

This shorter task will deliver a revised training plan for the final year of the project. The original Planets Training Plan (DT6-D1) was produced during the first year of the project, and outlined the plans envisaged for the training programme. Since the plan was produced significant developments have taken place, including changes to the course structure and modules, and the sharing of effort with DT10. A revised reference source for the Work Package is therefore required. The following areas will be addressed by the document:

- Evaluation of original training plan – considering the initial proposals and how these have changed over the course of the project and what alterations are required
- Revised programme structure – including target audiences, revised modules, generic course programme and scheduled courses
- Event organisation and evaluation – covering systems in place to ensure effective organisation of event, documents and templates, and procedures for event evaluation in order to assess the success and impact of the training programme

Effort

Partner(s)	Effort (PM)	Responsibilities
HATII	0.5	Draft the Revised Training Plan (DT6-D4) setting out new programme structure, systems, templates, roles and responsibilities

Task DT6-T6 – Training Programme Rollout

This task will form the heart of the Work Package and will provide the most demands on partner effort. It will ensure that training courses are delivered, and in turn require close collaboration with not only other Work Packages in Planets but also other FP6 projects such as those involved in the WePreserve consortium. A detailed breakdown of partner responsibilities and effort is provided in section 3, but the main sub-tasks will be:

- Organisation of five training events – DT6 will work with DT10 to organise the five training courses throughout Europe as part of the Planets Outreach and Training Programme
- Delivery of five training events – the Work Package partners will provide speakers for events who will prepare and deliver sessions to delegates. Supporting materials for attendees including reading lists will also be produced
- Collaboration with other projects – the Work Package will continue to communicate with other FP6 projects such as CASPAR to identify further collaborative opportunities for training events

Effort (per event)

Partner(s)	Effort (PM) per event	Responsibilities
HATII	1.5	• See Division of Labour document
Local host (DT10)	1	• See Division of Labour document
WIEN	0.5	• Design, with DT6 Lead, the structure of individual sessions and feedback from pre-questionnaire
HATII	0.5	
BL	0.25	
ONB	0.25	• Produce presentations and any other supporting documentation
KB-NL	0.25	
UzK	0.5	• Contribute items to pre-reading
NANETH	0.5	• Attend event and deliver session(s)
ARC	0.25	• Submit expense claims to own institution who will submit claim to DT6 Lead
BAR	0.25	
	[note: figures are average amount of effort across events – earlier events may require more preparation effort than later events]	

Task DT6-T7 – Development of Online Learning Support Facility

This task will work on the development of a training 'suite' for inclusion in the Planets portal. It will include the development of a prototype training video in conjunction with the work of DT8

(Demonstrators) that can be used both at training events and for online training tutorials. DT6 envisages the following activities within the task:

- Evaluation of multimedia technologies for training opportunities – assess how the use of video and other communication channels can be utilised for online training
- Development of prototype training video
- Revision and collation of course materials including development of event exercises
- Establishment of the Planets Training Portal

Effort

Partner(s)	Effort (PM)	Responsibilities
HATII	1.5	- Research variety of multimedia technologies available which have potential for training opportunities - Develop prototype training video potentially drawing on demonstrators from DT8 - Disseminate training materials through Planets portal

Task DT6-T8 – Ongoing Evaluation of Training Programme

The real success and impact of the training programme cannot be determined without effective evaluation of courses. This task will therefore assess the various aspects of the programme to ensure continual improvement and an extendable educational framework that survives beyond the end of the project. The following sub-tasks have been identified:

- Individual event evaluation – assess the success of each training event through the circulation of feedback forms, collation of results through a feedback summary, and the production of an event evaluation report
- Long-term impact assessment – evaluate the overall success and impact of the training programme through the production of the DT6-D5 deliverable

Effort

Partner(s)	Effort (PM)	Responsibilities
HATII	1.5	Produce feedback summaries for each event based on collated feedback form results

		• Produce Evaluation Reports for each event assessing the organisation, teaching methods, supporting documentation and promotional methods • Produce the Training Final Evaluation Report (DT6-D6) assessing the success of the training programme and its long-term impact

Appendix B   Terms of Reference for Planets training events

B1   Terms of Reference

Planets Outreach and Training Event Planning Workshop

Thursday 26 February

The British Library, St Pancras

Attendees

Clive Billeness

Vittore Casarosa

Lynne Chivers

Jane Humphreys

Session 1:   Terms of Reference

Planets Outreach and Training Programme is a series of events that will introduce potential adopters of Planets to the framework, technology, tools and encourage them to adopt them in their organisation.

The programme will comprise five two and three-day workshops delivered jointly by the DT6 (Training) and DT10 (Outreach) work packages between May 2009 and 2010.

Why are we doing the training and outreach events?

- Make people aware of the digital preservation problems and issues
- Demonstrate we have actual working SOLUTIONS and what Planets has developed
- Make people aware of Planets framework, tools and services and what they have to offer
- Equip people with skills to use the tools through training and hands-on practical exercises
- Encourage people to adopt Planets in their organisations and let them know how
- Get people to start deeper discussions (community of best practice)
- Provide a chance for people to input
- Get people to visualise Planets within their digital preservation strategy

The emphasis is on demonstrating Planets and how it could provide practical solutions to digital preservation challenges in their organisation.

Who must we attract to Planets outreach and training events?

The events will target potential early adopters of Planets ie:

- Planets Consortium partners (content-holding) and their partners (eg. government)
- European National libraries and national archives
- Legal deposit libraries and large data-holding institutions in Europe eg. Trinity College Dublin, Cambridge University Library, National Libraries of Scotland and Wales, Bodlean Library and their equivalents in Europe, NHS, NDA, AEA, European Patent Office

There are three primary targets in each organisation:

- CEOs or Heads of IT (strategic/commercial - aspects of digital preservation and Planets solution)
- Heads of Preservation or Conservation (conservation/library/archive background - practical solutions to preservation and benefits of using Planets)
- Digital Preservation Manager / Repository Managers (technical/IT stream - Planets technical solution and how it will work with their IT infrastructure and in their organisation)

The events won't target developers/vendors of digital preservation software/consultancy or systems integrators[1]. The Planets project will not certify new third-party tools. These groups will be targeted through the Supplier Vendor Briefing.

What do we want these people to know or do when they leave?

CEOs/Heads of IT (allocate budgets – "purse-holders")
- Realise there are issues around long-term preservation of digital content
- Recognise the problem affects their organisation
- Sees Planets as a solution that could work for their organisation and is worth investigating

Heads of Preservation/Conservation/Repository Managers (mandate activity - managers)
- Recognises the need to commit people and resources to digital preservation
- Sees Planets as a solution that could work for their organisation and is worth investigating
- Recognises Planets as an inexpensive solution that they could build into their preservation strategy and IT infrastructure and knows what to do next

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[1] Note: It was decided after the Supplier Vendor Briefing held on 3-4 June 2009 that Suppliers and Vendors should be invited to attend the Planets training events and the final event should include sessions targeted specifically at this audience.

Digital Preservation Manager (implement the solution – "doers")

- Understands the tools and services

- Has confidence Planets can provide them with a workable technical solution

- The repository manager understands how Planets could fit with their IT infrastructure

- Understands the practical and resource implications – how Planets will work back in the office

- Knows what to do next

Do we need to get more than one person from an institution to attend?

Yes. These audiences have different perspectives on the problem and will be responsible for implementing different elements of it (finance; strategy, policy and resourcing; technical).

Do we need to reserve places or to create special places?

Yes. These are the likely early adopters. We should advertise each event selectively at least one – two weeks before to contacts on the contact database and only afterwards open it up more widely. We should target named individuals in each of these jobs in each National Library and Archive.

Do people who want to take part in days two and three need to take part in day one?

Yes. Day one is the foundation and covers background information to carry out the simulation in day two.

How should the event be structured to meet ours and audience needs?

Day one will be targeted at up to 60 delegates and accommodate all audiences. The day may introduce parallel sessions to cater for special interests: business/commercial; policy and strategy; technical. Day one will be repeated but with a different key-note speaker and case study at eache event. Day one will need a lecture room.

Day two will be targeted at up to 40 Digital Preservation Managers (preservation, curation and IT staff) and will give them a practical introduction to Planets and how it could fit within their organisation. Sessions will be updated as new tools/versions become available. Day two will need a lab with wi-fi access for up to 15 laptops or server and 15 PCs.

NB: This means that care needs to be taken to structure registration so that no more than 20 places are filled with people attending for only one day!

Do the proposed locations and scheduling work?

Yes ie:

First Outreach Event	Northern Europe	Copenhagen/Aarhus	May/June 2009
Second Outreach Event	Eastern Europe	Sofia	Sept/October 2009
Third Outreach Event	Central Europe	Bern	November 2009
Fourth Outreach Event	Western Europe	London	January 2010
Fifth Outreach Event	Southern Europe	Pisa/Rome	March/April 2010

Subject to confirmation of dates and venues and with speakers.

What teaching and learning styles best suit our audience's needs?

- Technical
- Marketing oriented presentations
- Hands-on, practical and demonstrations
- Inclusion of best practice/case studies
- Interaction and facilitated discussion/question and answer

How should the events be advertised?

Events will be advertised/communicated individually, making it clear that they are one in a series. Include specials in each eg. key-note speaker, regional case. They will initially be advertised through direct e-mails to contacts in the contact database and Planets user community database and then subsequently through mailing lists, the newsletter, website and event listings.

B2   Division of Labour

DT6 Work Package Lead (General)

- Manage the DT6 work package to ensure timely delivery of tasks and deliverables.

- Evaluate and draft the end of Year 3 Report on Training activities.

- Draft the Year 4 Training Plan setting out tasks, effort and roles and responsibilities.

- Coordinate Planets Training activities.

- Maintain regular communication within the DT6 work package directing activities.

- Maintain regular communication between DT6, the DT SPL and other parts of the project.

- Manage the delivery of all aspects of the five three-day DT6 Training (see below)

- Establish relationship with Local Hosts and ensure clarity over roles and responsibilities

- Coordinate the activities of Local Hosts drawing on 1PM of DT10 effort per event.

- Put in place and communicate the arrangements to fund Planets Training.

- Set up and administer an account to fund Training activities.

- Manage the production of online support materials (eg. videos).

- Provide support for Training activities carried out in non-DT6 work packages (eg. TB4).

- Participate in calls to coordinate Training activity with partner projects (eg. WePreserve).

- Coordinate the provision of Planets speakers for external Training (eg. WePreserve).

DT10 Work Package Lead (General)

- Manage the DT10 work package to ensure timely delivery of tasks and deliverables.

- Draft Evaluation of Year 3 Outreach Activities and Year 4 Outreach Plan (if app.).

- Coordinate Planets Outreach activities as set out in Year 4 Implementation Plan.

- Maintain regular communication within the DT10 work package directing activities.

- Participate in DT6 Event Calls and oversee delivery of prescribed activity by DT10 Local Hosts.

- Maintain regular communication between DT10, the DT SPL and other parts of the project.

- Draft Evaluation of Year 4 Outreach Activities and Impact Assessment.

DT6 / DT10 Training Events Roles and Responsibilities

To follow is a proposed division of labour between the DT6 Work Package Lead with 1PM to 1.5PM of DT6 effort per event and each of the five Local Hosts with 1PM to 1.5PM of DT10 effort to provide support for one event.

Role 1: DT6 Work Package Lead (Training Events) (Est. 6PM total effort)
Supported by Local Hosts with effort in DT10 (See Role 2)

Manage the delivery against plan of five Training events between May 2009 and May 2010. A Product Based Plan, Gantt Chart for all five events and Outreach Plan has been provided by the British Library.

- Initiate the DT6 Training Events with the Local Hosts (with effort drawn from DT10).
- Agree the event aims, objectives and size and a provisional date and venue.
- Develop the **Event Plan** and **Programme** with the Local Host and speakers. This will involve an all-speaker call to agree the initial Programme.
- Develop the **Timeline** with the BL (Lynne Chivers) and share with all. Incorporate any event-specific activity into the event Timeline.
- Drive and monitor progress of work on DT6 Training Events against the Event Gantt Chart or Timeline (whichever is being used).to ensure that work is delivered on time. This should be the starting point for every progress call.
- Review and approve or amend all documentation and communication relating to the event.
- Develop the **Event Budget** with the Local Host and approve it with the DT SPL.
- Finalise the venue and date with the Local Host.
- Set up an **Event Account** at HATII, monitor income into and payments from the account.
- Order and arrange for the payment of invoices for all services relating to the event.
- Work with the third-party provider to develop the **Online Registration Form**
- Work with the third-party provider to coordinate the registration process.
- Coordinate the drafting and issuing by the Local Host of event communications.
- Maintain and produce the **Agenda** and **Action Notes** of regular communications with the Local Host through weekly / bi-weekly calls.
- Maintain and produce the **Agenda** and **Action Notes** of communications with speakers through ad hoc calls to develop the programme. This will include a second pre-event call to finalise the programme, exercises, speakers and pre-reading.
- Liaise with speakers to define and develop materials to support the event (presentations, exercises, collections and **Pre-Reading**.)
- Arrange for final delegate numbers and special needs to be confirmed to the venue.
- Arrange for equipment and room lay-out needs to be confirmed to the venue.
- Arrange for outstanding monies to be chased and paid into the event account.
- Collate questionnaire responses and produce a **Summary** for the chair of the discussion.

- Coordinate pre-event call to ensure all logistical arrangements in place.
- Provide office back-up to the Local Host during the event.
- Coordinate post-event debrief call. Arrange for follow-up actions (issue of thank yous and drafting of Evaluation Report).
- Close the account and send a financial report to the SPL and Project Manager.
- Put event materials on DT6 wiki.

Role 2: Local Host (Training Events) (Est. 1PM to 1.5PM per event from DT10)
(Five local hosts with effort in DT10)

Provide support over a 3-month (+) period to set up and deliver one Training event.

- Carry out activities as directed by DT6 WPL drawing on 1PM of DT10 effort.
- Participate in all calls relating to coordination of the Training event.
- Draft the **Event Plan** incorporating the programme agreed with speakers. The programme will be developed by the DT6 Lead (see role 1) with the speakers. Incorporate **Hospitality Plan**. This may simply be a paragraph explaining the hospitality that will be provided to delegates eg. a dinner on Day One.
- Research and cost the event venue and hospitality.
- Visit venues to determine suitability.
- Draft and have approved the **Event Budget**.
- Reserve and book the venue, catering, room lay-out and equipment and hospitality.
- Provide details of event suppliers to the DT6 lead so that Purchase Orders can be issued.
- Draft core **Event Web-pages** (Home, Programme, Speakers, Abstracts, Registration, Pre-Reading, Venue and Hotels) and work with HATII web-content team to create physical web pages.
- Draft, approve with DT6 Lead **Event Mailings**. This will comprise a series of three electronic mailings which will be e-mailed to the Planets User Community and target mailing lists via the Planets mailbox.
- Research and identify region-specific mailing lists and ensure that the BL subscribes the Planets Mailbox to these lists. Issue Event Mailings.
- Arrange to receive regular updates on delegate numbers from The Conference People.
- Adapt content and timing of communications to secure full attendance.
- Liaise with speakers to draft and create the **Supporting Event Web-pages** and contents of the delegate packs (biographies, abstracts, pre-reading from the DT6 Lead).
- Obtain menus from the venue and restaurant and confirm catering to venue.
- Work with speakers to identify equipment needs and book equipment.
- Compile and arrange for The Conference People to issue pre-reading and questionnaire to delegates.
- Develop the **Event Evaluation** and **Feedback Forms** (days one and three).

- Finalise catering, room, equipment requirements with venue and hospitality.

- Put in place the staffing of the event.

- Create a **Logistics Plan** for the three days of the event. Brief speakers and organisers.

- Arrange for the issue by TCP of pre-joining communication to delegates.

- Create physical **Delegate Packs**, **Certificates**, **Badges** and feedback forms.

- Confirm final delegate numbers and produce **Delegate Lists**.

- Confirm delegate numbers to venue and restaurant(s).

- Confirm final logistical arrangements to speakers and organisers.

- Create time-keeping prompts and signage.

- Arrange transport of support materials to the venue.

- Set up the event, physically register delegates and man the event throughout.

- Check room layouts and equipment and reserve speakers'seating.

- Collate presentations and arrange for them to uploaded to the Planets website.

- Write to speakers to thank them for their involvement.

- Write to particpants via TCP to thank them for attending and signpost presentations.

- Transcribe facilitated discussion (if app.).

- Draft **Evaluation Report** and circulate it with individual feedback to speakers.

- Write up event for newsletter.

- Record time and alert DT6 WPL if Local Host will run out of time before the event.

Financing of Training Events

The arrangements for funding training events is set out in a separate document: 'Funding of Planets Training Events'. Funding is administered by the DT6 Work Package Lead, HATII.

B3   Funding of DT6 Training and DT10 Outreach Events

1.0   Introduction

This proposal sets out the arrangements for reclaiming the time and costs of providing speakers and/or organising one of the five DT6 Training Events in Year 4.

2.0   Overview of DT6 Training Programme

Planets will host five three-day DT6 Training and Outreach Events between June 2009 and May 2010 in five locations in Europe: Copenhagen, Denmark (22-24 June 2009); Sofia, Bulgaria (21-23 September 2009); Bern, Switzerland (November 2009); London, England (January 2010) and Rome/Pisa (March 2010). They consolidate DT6 Training and DT10 Outreach days for Year 4 to reduce costs and demands on speakers' time.

To reach the largest audience, the programme will be similar at each of the five events. Some institutions may need to regularly provide speakers (eg. TUWIEN/Naneth, KB-NL, ONB/HATII, ARC and UzK) or will organise one of the five events (SB, ONB, BAR, TNA, BL). The arrangements below allow institutions to recover the costs from the budget set aside for DT6 Training events. This is separate to institutions' own Training budget which should still be used to pay speakers' expenses for attending external training events (eg. WePreserve, JCDL etc).

3.0   Funding of DT6 Training Events

Planets has €440,000 set aside for Training. €174,000 has been allocated to HATII to lead Planets' Training activities. This includes €71,000 to pay for event costs such as venue, catering and equipment (€E31,000) and speakers' expenses (€40,000). Each instituion has a small amount of money and time to prepare for and present Planets training, produce training materials and represent Planets at external events. Scientific Board members are asked to give priority to the five DT6 Training events to ensure that sufficient speakers and DT6 time is available to deliver the series.

4.0   Cost of Training Events

Each DT6 Training Event will cost around €20,000 to €25,000 and €120,000 to €125,000 in total. These comprise €10,000 for speaker travel and subsistence and €10,000 – €15,000 for venue, equipment and catering. They are based on 10 speakers taking part over three days and will vary depending on the location, venue and catering costs. The Planets Training budget can provide up to €11,000 per Training event. The remaining costs will need to be recovered from delegate fees.

5.0   Administration of the DT6 Training Budget

The Training programme will be managed and coordinated by the DT6 Work Package drawing on 1 – 1.5 PM of effort per event and 1 – 1.5 PM per event of effort from local organisers – local hosts – in the DT10 work package. HATII will administer the Planets Training budget and the events. HATII will place orders for goods and services to support Training events and pay for them. HATII will also reimburse speakers' costs.

6.0   Reimbursement of Event Organisation Costs

The local host will, at the direction of the DT6 Lead, set up and publicise the event. They will provide the DT6 and DT10 Work Package Leads with a budget for the event and contact details of suppliers of services. Organisers should confirm the costs for each speaker to travel to the event and include them in the budget. The budget will be approved by the DT6 Work Package Lead. Where Planets may need to pay over €11,000 towards the event, the budget will be approved by the DT Sub Project Lead and Programme Manager. HATII will contract with, issue purchase orders and settle invoices directly with event suppliers. HATII has already contracted with The Conference People to provide third-party registration and billing services for the first two events. Local hosts should allow a registration fee of €18 per head in the budget. Organisers' expenses should be included in the budget and claimed as set out in 6.0 below. Local organisers should record their time as DT10.

7.0   Reimbursement of Speakers' Costs

Reasonable expenses will be paid to speakers to take part in Planets DT6 Training Events. Expenses include the cost of travel, including to and from the airport and the

venue, accommodation and subsistence including reasonable beverages with meals but not speaking fees. A <u>maximum</u> of €1,000 is allowed per speaker participating in all three days. All travel should be by standard class.

Members of the Scientific Board are asked to arrange with their finance teams for an expense head to be set up for DT6 Training Events. They are asked to communicate the arrangements for claiming expenses for DT6 Training events to their staff and finance teams. This will be a separate expense head to their institutional training expense head. Speakers should book travel and accommodation and claim expenses as usual but make certain they quote the DT6 Training Event expense code. Original receipts need to be submitted with claims. Speakers are asked to submit claims within five working days of the end of an event. Local finance teams are asked to submit invoices for expenses to HATII within ten working days of the end of an event. They do not need to send receipts but should keep them locally. Speakers should record their time as DT6 Training.

8.0   Accounting and Reporting

The DT6 Lead will set up an event account with their finance team and monitor the status of the account for each event. The DT6 Lead will provide the Sub Project Lead and Programme Manager with asummary and the balance at the end of each event and the series. The Sub Project Lead and Programme Director reserve the right to suspend events if the number of delegates is repeatedly insufficient or the income received is unsustainable.

Scientific Board members are asked to:

- Arrange with their finance teams for an expense head to be set up for DT6 Training Events. This is separate to the expense head for their institutional training budget.
- Communicate Planets staff and finance teams how to claim for costs relating to DT6 Training Events. This will help to ensure that costs are repaid.
- Ask staff to submit expense claims within five working days of the end of an event and finance teams to submit invoices within 10 working days. This will allow the budget to be monitored.
- Give priority to DT6 Training events over any other type of training to ensure speakers   are   available   to   deliver   the   full   series.

B4   Product-based Plan

B5   Excerpt from Gantt Chart (Copenhagen

ID	lineCo	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1		Local host identified	0 days	Mon 23/02/09	Mon 23/02/09		
2		Start-up event planning	0.5 days	Mon 23/02/09	Mon 23/02/09	1	DT/6 Lead
41	eakers	Identify aims/size of event	0.5 days	Tue 24/02/09	Tue 24/02/09	2	DT/6 Lead
42	eakers	Draft Event Plan/Programme	1 day	Mon 02/03/09	Tue 03/03/09	41	DT/6 Lead
50	eakers	Identify potential speakers	1 day	Tue 03/03/09	Wed 04/03/09	42	DT/6 Lead
40		arch event venues and costs	3 days	Tue 03/03/09	Fri 06/03/09	41FS+5 days	Local Host
45	eakers	Circulate programme and invite speakers	0.25 days	Wed 04/03/09	Wed 04/03/09	50,42	DT/6 Lead
46	eakers	Finalise event plan, programme, speakers and timeline with spea	1 day	Wed 11/03/09	Thu 12/03/09	45FS+5 days	DT/6 Lead
47	eakers	Circulate agreed event plan, programme, speakers and timeline	0.5 days	Thu 12/03/09	Thu 12/03/09	46	DT/6 Lead
43	ancial	Draft hospitality plan	0.5 days	Fri 13/03/09	Fri 13/03/09	42,47	Local Host
3	ancial	Draft event budget	1 day	Fri 13/03/09	Mon 16/03/09	40FS+5 days,43	Local Host
74	Venue	Agree venue	1 day	Fri 20/03/09	Mon 23/03/09	3FS+4 days	Local Host
5	pment	Identify training equipment needed	0.5 days	Mon 23/03/09	Tue 24/03/09	47	Local Host
10	pment	Identify speakers' equipment needs	0.5 days	Mon 23/03/09	Tue 24/03/09	47	Local Host
44	ancial	Research restaurants etc	0.25 days	Tue 24/03/09	Tue 24/03/09	43FS+4 days,74	Local Host
75	ancial	Refine budget	0.25 days	Tue 24/03/09	Tue 24/03/09	74FS+1 day,44,5	Local Host
76	ancial	Approve budget with DT/6 Lead and SPL	1 day	Mon 30/03/09	Tue 31/03/09	75FS+4 days	Local Host
4	ancial	Agree financial arrangements	1 day	Tue 31/03/09	Wed 01/04/09	49	DT/6 Lead
49	eakers	Date agreed	0 days	Tue 31/03/09	Tue 31/03/09	74,76,115SS	
115	eakers	Agree date	0.5 days	Tue 31/03/09	Wed 01/04/09	45	DT/6 Lead
78	Venue	Book venue	0.25 days	Thu 09/04/09	Thu 09/04/09	49,76	Local Host
79	atering	Book restaurant for hospitality (provisionally)	0.25 days	Thu 09/04/09	Thu 09/04/09	78SS	Local Host
80	atering	Book caterer at venue	0.25 days	Thu 09/04/09	Thu 09/04/09	78SS	Local Host
11	pment	Book speakers' equipment	0.5 days	Thu 09/04/09	Thu 09/04/09	10FS+5 days,78S	Local Host
77	Venue	Compile hotel info for delegates	0.75 days	Tue 14/04/09	Tue 14/04/09	76	Local Host
52	ations	Identify priority delegates to invite	0.25 days	Tue 14/04/09	Tue 14/04/09	47	DT/6 Lead
28	tration	Draft registration form	1 day	Tue 14/04/09	Wed 15/04/09	4FS+7 days,77,4	DT/6 Lead
38	Venue	Venue booked	0 days	Tue 14/04/09	Tue 14/04/09	79,11,78SS+1 da	
62	ations	Draft priority publicity material	0.5 days	Wed 15/04/09	Wed 15/04/09	52,77,47,38	Local Host
29	tration	Build registration system	1 day	Wed 15/04/09	Thu 16/04/09	28,38	DT/6 Lead
63	ations	Revise priority publicity material	0.25 days	Tue 21/04/09	Tue 21/04/09	62FS+3 days	Local Host
30	tration	Booking process ready to open	0 days	Tue 21/04/09	Tue 21/04/09	29FS+3 days	
31	tration	Open priority booking	0 days	Tue 21/04/09	Tue 21/04/09	30,64	DT/6 Lead
64	ations	Priority publicity material approved	0 days	Tue 21/04/09	Tue 21/04/09	63FS+0.5 days	
68	ations	Issue priority publicity	0.25 days	Tue 21/04/09	Tue 21/04/09	31SS	Local Host
51	ations	Agree general publicity channels	0.5 days	Mon 27/04/09	Mon 27/04/09	52,47	DT/6 Lead
65	ations	Draft general publicity material	1 day	Mon 27/04/09	Tue 28/04/09	51,77,38	Local Host
66	ations	Revise general publicity material	0.25 days	Thu 07/05/09	Thu 07/05/09	65FS+3 days	Local Host
32	tration	Produce priority delegate list	0 days	Wed 13/05/09	Wed 13/05/09	68FS+10 days	DT/6 Lead
33	tration	Open general booking	0 days	Wed 13/05/09	Wed 13/05/09	32	DT/6 Lead

Project: DT10 DT6 Event Planning v 0.5	Task		Progress		Summary		External Tasks		Deadline	
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ID	❶	lineCo	Task Name	Duration	Start	Finish	Predecessors	Resource Names
67		ations	General publicity material approved	0 days	Wed 13/05/09	Wed 13/05/09	66FS+2 days	
69	◈	ations	Issue general publicity - 1st notice	0.5 days	Wed 13/05/09	Wed 13/05/09	67,33SS	Local Host
56		packs	Determine contents of delegate pack	0.5 days	Mon 18/05/09	Mon 18/05/09	47,38	DT/6 Lead
48		sading	Define pre-reading	1 day	Mon 18/05/09	Tue 19/05/09	47,38	DT/6 Lead
57	◈	packs	Issue guidelines for delegate pack contents	0.5 days	Tue 19/05/09	Tue 19/05/09	56	DT/6 Lead
70		ations	Draft general publicity - 2nd notice	0.25 days	Tue 19/05/09	Tue 19/05/09	69	Local Host
71		ations	Issue 2nd general publicity	0.5 days	Wed 20/05/09	Wed 20/05/09	70,69SS+5 days	Local Host
89	◈	dback	Draft evaluation plan incl feedback forms	0.75 days	Wed 27/05/09	Wed 27/05/09	41,71	DT/6 Lead
55	◈	dback	Prepare pre-course questionnaire	1 day	Thu 28/05/09	Thu 28/05/09	89,47	DT/6 Lead
72		ations	Draft final notice	0.5 days	Thu 28/05/09	Thu 28/05/09	71	Local Host
53		sading	Compile pre-reading	1 day	Fri 29/05/09	Fri 29/05/09	48FS+5 days,55	DT/6 Lead
73		ations	Issue Final Notice	0.5 days	Fri 29/05/09	Fri 29/05/09	72,71SS+5 days	Local Host
94		packs	Assemble biographies	0.5 days	Wed 03/06/09	Wed 03/06/09	47	DT/6 Lead
95		packs	Assemble abstracts	0.5 days	Wed 03/06/09	Wed 03/06/09	47	DT/6 Lead
97		itering	Agree menus	2 days	Wed 03/06/09	Mon 08/06/09	69	Local Host
105	◈	packs	Collate speakers' presentations	0.5 days	Mon 08/06/09	Mon 08/06/09	47	DT/6 Lead
96		dback	Circulate event evalutation and feedback forms	0.25 days	Mon 08/06/09	Mon 08/06/09	89	DT/6 Lead
34		tration	Booking closed	0 days	Tue 09/06/09	Tue 09/06/09	73SS+5 days,53I	
58	◈	packs	Compile delegate pack	1 day	Tue 09/06/09	Tue 09/06/09	57FS+10 days,3(	DT/6 Lead
35	◈	tration	Invoices issued	0 days	Wed 10/06/09	Wed 10/06/09	34SS	
36	◈	tration	Pursue late payments	0.25 days	Wed 10/06/09	Wed 10/06/09	34FF,35	DT/6 Lead
99		gistics	Draft "on the day" logistics plan	0.25 days	Wed 10/06/09	Wed 10/06/09	11,34SS	DT/6 Lead
27		tration	Produce full delegate list	0.5 days	Wed 10/06/09	Wed 10/06/09	34	DT/6 Lead
100	◈	taffing	Identify event staff	0.5 days	Fri 12/06/09	Fri 12/06/09	99	DT/6 Lead
19		pment	Set up delegate Plato/Testbed accounts	1 day	Fri 12/06/09	Mon 15/06/09	25SS	TUWIEN
24		sading	Issue pre-reading and questionnaires	0.5 days	Fri 12/06/09	Fri 12/06/09	25,55,53,19SS	DT/6 Lead
25		tration	Delegate list produced	0 days	Fri 12/06/09	Fri 12/06/09	27	
26		itering	Confirm details with restaurant (hospitality)	0.5 days	Fri 12/06/09	Fri 12/06/09	25	Local Host
39	◈	itering	Arrange detailed catering with caterer	0.25 days	Fri 12/06/09	Fri 12/06/09	25,97FS+3 days	Local Host
23		sading	Pre-Course Questionnaires returned	0 days	Mon 15/06/09	Mon 15/06/09	24	
102		sading	Collate questionnaire responses	0.5 days	Mon 15/06/09	Mon 15/06/09	23	DT/6 Lead
103		sading	Analyse questionnaire responses	0.5 days	Mon 15/06/09	Mon 15/06/09	102	DT/6 Lead
6		pment	Book training equipment	0.25 days	Mon 15/06/09	Mon 15/06/09	5,78	Local Host
7		gistics	Arrange delivery of training equipment to venue	0.25 days	Tue 16/06/09	Tue 16/06/09	6	Local Host
104		sading	Draft questionnaire summary and send to discussion facilitator	1 day	Tue 16/06/09	Tue 16/06/09	103	DT/6 Lead
106		gistics	Create signs, incl timekeeping	0.25 days	Tue 16/06/09	Tue 16/06/09	99	Local Host
21		packs	Print Feedback forms	0.5 days	Tue 16/06/09	Tue 16/06/09	25,89	Local Host
59	◈	packs	Produce delegate pack	1 day	Wed 17/06/09	Wed 17/06/09	58,25,105FS+4 d	Local Host
107		sakers	Brief speakers (email)	0.5 days	Wed 17/06/09	Wed 17/06/09	99	DT/6 Lead
14	◈	packs	Prepare badges	0.25 days	Thu 18/06/09	Thu 18/06/09	25	DT/6 Lead

Project: DT10 DT6 Event Planning v 0.5	Task		Progress		Summary	External Tasks	Deadline
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ID	❶	lineCo	Task Name	Duration	Start	Finish	Predecessors	Resource Names
98	📎	gistics	Book transport of materials	0.25 days	Thu 18/06/09	Thu 18/06/09	25	Local Host
108		taffing	Brief organisers (phone or face-to-face)	0.5 days	Thu 18/06/09	Thu 18/06/09	99	DT/6 Lead
15		packs	Print badges	0.25 days	Thu 18/06/09	Thu 18/06/09	14	Local Host
16		packs	Prepare certificates	0.25 days	Thu 18/06/09	Thu 18/06/09	25	DT/6 Lead
17		packs	Print certificates and sign	0.5 days	Thu 18/06/09	Thu 18/06/09	16	Local Host
109		gistics	Transport materials to event	0.25 days	Fri 19/06/09	Fri 19/06/09	98,59,17,15	Local Host
116	📅	Venue	Access to venue enabled	0 days	Fri 19/06/09	Fri 19/06/09		
12		Venue	Check speakers' equipment	0.25 days	Fri 19/06/09	Fri 19/06/09	11,116SS	Local Host
13		Venue	Check room layout and reserve speaker seats	0.25 days	Fri 19/06/09	Fri 19/06/09	11,116SS	Local Host
18		Venue	Set up registration desk	0.25 days	Fri 19/06/09	Fri 19/06/09	17,15,116SS	Local Host
110	📎	iancial	Transfer monies into event account	0.25 days	Fri 19/06/09	Fri 19/06/09	116SS	DT/6 Lead
81	📅📎	peakers	Day 1 Outreach	1 day	Mon 22/06/09	Mon 22/06/09	13,18,21,23,59F!	Local Host(200%
101		gistics	Logistics complete	0 days	Mon 22/06/09	Mon 22/06/09	100SS+5 days,1(	
8	📎	pment	Training equipment delivered to venue	0 days	Mon 22/06/09	Mon 22/06/09	7,109	
9		pment	Configure training equipment	0.5 days	Mon 22/06/09	Mon 22/06/09	8	TUWIEN
82		peakers	Day 2 Training	1 day	Tue 23/06/09	Tue 23/06/09	81,9,19	Local Host(200%
83	📎	peakers	Day 3 Training	1 day	Wed 24/06/09	Wed 24/06/09	82	Local Host(200%
85		peakers	Thanks email to speakers	0.25 days	Thu 25/06/09	Thu 25/06/09	83	DT/6 Lead
87		ations	Publish presentations on website	0.25 days	Thu 25/06/09	Thu 25/06/09	58,81,83	DT/6 Lead
86	📎	ations	Thanks email to participants	0.25 days	Thu 25/06/09	Thu 25/06/09	85,87	DT/6 Lead
111	📎	ations	Transcribe facilitated discussion	0.5 days	Fri 26/06/09	Fri 26/06/09	83SS+2 days	Local Host
88	📎	idback	Feedback received	0 days	Fri 26/06/09	Fri 26/06/09	83FS+2 days,87	
90	📎	idback	Produce event evaluation report	2 days	Mon 29/06/09	Tue 30/06/09	89,88	DT/6 Lead
91		idback	Circulate evaluation report and send speakers' individual feedbac	0.5 days	Thu 02/07/09	Thu 02/07/09	90FS+1 day	DT/6 Lead
92	📎	ations	Put event materials on wiki	0.25 days	Thu 02/07/09	Thu 02/07/09	91	DT/6 Lead
114		ations	Write up event for newsletter	1 day	Thu 02/07/09	Fri 03/07/09	83,91	DT/6 Lead
84	📎	iancial	Ensure supplier invoices paid	0.25 days	Mon 06/07/09	Mon 06/07/09	83FS+7 days,11(	DT/6 Lead
37	📎	tration	All delegate payments received	0 days	Mon 06/07/09	Mon 06/07/09	36FS+5 days	
112		iancial	Close event account	0.5 days	Mon 06/07/09	Mon 06/07/09	84,36,37	DT/6 Lead
113		iancial	Draft final event financial report and send	0.5 days	Mon 06/07/09	Tue 07/07/09	112	DT/6 Lead
93		pment	Event completed	0 days	Tue 07/07/09	Tue 07/07/09	87,90,92,84,114,	
20			Design Feedback forms	0.25 days	Mon 13/07/09	Mon 13/07/09		DT/6 Lead
54			Issue pre-reading	1 day?	Tue 14/07/09	Tue 14/07/09	53,25	DT/6 Lead
22			Print Days 2/3 feedback forms	0.25 days	Tue 14/07/09	Tue 14/07/09		Local Host
60			Apply to PDF to underwrite	0 days	Tue 14/07/09	Tue 14/07/09		
61			Approval for underwriting by PDF received	0 days	Tue 14/07/09	Tue 14/07/09		

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Appendix C   Event Planning Documents

C1   Event Plan (Copenhagen)

Event Plan

Planets Outreach and Training Event, Denmark in June 2009

Workshop on the Planets way of long term digital preservation

Planets is organising an Outreach and Training Event in June 2009 in Denmark. This document summarises the event outline, target groups, objectives, format, speakers, and programme for and evaluation of the event.

Location and date

Copenhagen, 22-24 June

Event Outline

The event will be a three-day combined training and outreach event. It will start with one day of Outreach followed by two days of Training. Day 2 will be training using a scenario (a collection) to develop a preservation plan and Day 3 will have a focus on hands on using the Testbed and Planets tools to preserve a specific type of digital object. The event aims on Day 1 to educate CEOs, Heads of IT, Curation and Preservation and preservation / Curation / IT staff about the issues with preserving digital content and the benefits of Planets. At the same time Days 2 and 3 of the event will be an opportunity for digital preservation staff to gain hands-on experience of the different Planets tools for characterisation, planning and testing.

Target groups

The workshop fulfils task 6 of the DT10 Work Package to deliver one of five outreach events combined with DT6's Work Package tasks to deliver a series of training events.

The event will target potential early adopters of Planets ie:

- Planets Consortium partners (content-holding) and their partners (eg. government)
- National libraries and national archives
- Large data-holding institutions

There are three primary target groups in each organisation:

- CEOs or Heads of IT (strategic/commercial - aspects of digital preservation and Planets solution)
- Heads of Preservation or Conservation and/or Repository Managers (conservation/library/archive background - practical solutions to preservation and benefits of using Planets)
- Digital Preservation Manager (technical/IT stream - Planets technical solution and how it will work with their IT infrastructure and in their organisation)

Objectives

The objectives of the event are to:

- Make people aware of the digital preservation problems and issues
- Demonstrate we have actual working solutions and show what Planets has developed
- Make people aware of Planets framework, tools and services and what they have to offer
- Equip people with the skills they need to use the tools through training and hands-on practical exercises
- Encourage people to adopt Planets in their organisations and let them know how
- Get people to start deeper discussions (community of best practice)
- Provide a chance for people to input
- Get people to visualise Planets within their digital preservation strategy

Format

The event aims to attract max 60 participants on day 1, and max 40 participants on Day 2 and 3. Day 1 will provide an overview of the issues and challenges relating to digital preservation and the Planets project's way of handling the challenges, combined with case studies and panel discussion. Day 2 will focus on training to create a preservation plan using a sample collection. Day 3 will focus on using the Testbed and other Planets tools to preserve a particular type of file format .

Programme and speakers (see programme)

Day 1

Day 1 aims to develop an understanding of the Planets tools and framework as well as the general challenges of long term digital preservation. Day one is intended for executive, IT staff, and preservation/ curation staff. It includes a case study to show digital preservation in practice and a facilitated discussion.

Day 2 and 3

Day 2 and 3 will guide the attendees through a complete preservation scenario using a fictitious "real collection" to introduce Planets tools and to create a preservation plan. The intended audience is mainly preservation / curation staff and IT staff. The focus will be on the use of preservation planning tools, characterisation and preservation actions, the use of specific Planets tools to preserve particular types of file formats, and finally the use of the Planets Testbed to verify in a controlled environment the preservation plan developed in the course of the presentations.

Communication

The event will be communicated first directly by e-mail to National Libraries and Archives and Planets User Community members. After one - two weeks it will be publicised more widely using the Planets website, mailing lists and partner websites.

Timeline

To follow.

Evaluation

The event and sessions will be evaluated against objectives using an evaluation document and feedback form and reported in an Evaluation Report.

C2   Event Programme (Copenhagen)

Digital Preservation – The Planets Way

Programme Day 1, 22 June 2009

Time	Session	Speaker
08:30 - 09:00	**Coffee and Registration**	
09:00 - 09:30	**Introduction to Digital Preservation: Why preserve?**	Ross King, Austrian Research Centers
09:30 - 10:00	**The Preservation Action Cycle: Introduction to Planets**	Clive Billenness, British Library
10:00 - 10:30	**Preserving Digital Content**	Volker Heydegger, University at Cologne
10:30 - 11:00	**Why do we have to plan preservation solutions?**	Christoph Becker, Vienna University of Technology
11:00 - 11:15	**Break**	
11:15 - 12:00	**Digital Preservation: How to Preserve**	Sara van Bussel, The National Library of the Netherlands
12.00 - 13:00	**Lunch**	
13:00 - 13:45	**Tools: How to Understand Files**	Jan Schnasse, University at Cologne
13:45 - 14:30	**Digital Preservation: How to Verify**	Petra Helwig, The National Archives of the Netherlands
14:30 - 14:45	**Break**	
14:45 - 15:45	**Digital Preservation: How to Plan**	Christoph Becker, Vienna University of Technology
15:45 - 16:30	**Tools: How to Integrate the Components of Digital Preservation**	Ross King, Austrian Research Centers
16:30 - 17:00	Case Study	Barbara Sierman, The National Library of the Netherlands
17:00 - 17:30	**Summary of Value and Benefits and Facilitated Discussion with Speaker Panel**	Clive Billenness, British Library
19:00	**Dinner for participants**	

Programme Day 2, 23 June 2009

Time	Session	Speaker
08:30 - 09:00	**Coffee**	
09:00 - 09:30	**Introduction to the Digital Preservation Scenario and to a "real collection"**	Vittore Casarosa, HATII at the University of Glasgow
09:30 - 10:30	**Preservation Planning with Planets**	Hannes Kulovits and Christoph Becker, Vienna University of Technology
10:30 - 10:45	**Break**	
10:45 – 12:00	**Group Exercise: Define, present and discuss objective tree**	Hannes Kulovits and Christoph Becker, Vienna University of Technology
12:00 - 12:45	**Lunch**	
12:45 - 14:15	**Characterisation of Digital Documents**	Volker Heydegger and Jan Schnasse, University at Cologne
14:15 - 15:15	**Preservation Actions**	Sara van Bussel, The National Library of the Netherlands
15:15 - 15:30	**Break**	
15:30 - 17:00	**Benchmarking Preservation Tools: the Testbed Environment**	Petra Helwig, The National Archives of the Netherlands and Brian Aitken, HATII at the University of Glasgow
17:00 - 17:30	**Day 2 Closing Session**	

Programme Day 3, 24 June 2009

Time	Session	Speaker
08:30 - 09:00	**Coffee and Registration**	
09:00 - 11:00	**Finalising a Preservation Plan**	Hannes Kulovits, Vienna University of Technology
11:00 - 11:15	**Break**	
11:15 - 12:45	**Experiencing the Testbed Environment**	Brian Aitken, HATII at the University of Glasgow
12:45 - 13:15	**Light Lunch**	
13:15 - 14:15	**Pulling it all together: Implementing Digital Preservation using the Planets Interoperability Framework**	Clive Billenness, British Library
14:15 - 15:00	**Round-up of the learning days, lecturers' panel, discussion and feedback**	

C3   At a Glance Timeline

The Planets Way of long term digital preservation
Date: 22-24 June 2009
Venue: The Royal Library, Copenhagen

Activity	30/03 12	06/04 11	14/04 10	20/04 9	27/04 8	04/05 7	11/05 6	18/05 5	25/05 4	02/06 3	08/06 2	15/06 1	22/06 0	Owner
Produce event aims and size	X													
Secure event date	X													
Agree event plan	X													
Confirm venue + venue and catering prices	●													
Draft **event programme**/speakers	X													
Draft **budget**	X													
Coordinate programme with Vittore	X													
Coordinate social activities with Vittore	●													
Contact hotels and draft list of hotels for delegates	●													
Brief webmaster	●													
Confirm funding		●												
Invite speakers		X												
Confirm speakers		●												
Draft **registration form**	●													
Get abstracts from speakers		●												
Get biographies from speakers		●												
Secure online registration provision		●												
Agree registration arrangements		●												
Agree collection of delegate fees		●												
Draft and publish **event web-pages**			●											
Draft and issue **event notice**			●											
- to user community and personal contacts			●											
- to contact database (spreadsheet)				●										
- to mail lists XXX					●									
- others? (ABM-sentrum, ABM-utvikling)					●									
Monitor response					••								
(Draft and) issue **reply**, including invoice, to					••								

Activity	30/03 12	06/04 11	14/04 10	20/04 9	27/04 8	04/05 7	11/05 6	18/05 5	25/05 4	02/06 3	08/06 2	15/06 1	22/06 0	Owner
Draft and issue **second notice**							●							
Send **questionnaire** to speakers for feedback									●					
Collate homework and reading lists from speakers									●					
Collate speaker feedback and amend questionnaire										●				
Draft and issue **mail to delegates** with homework and reading lists + questionnaire										●				
Book accommodation if staying overnight									●					
Conference call to talk through arrangements on day, check everything covered										●		●		
Draft and approve **evaluation document**											●			
Collate questionnaires from delegates											●			
Create **feedback log spreadsheet**											●			
Finalise arrangements with Conference Centre											●			
Appoint minute-taker for the facilitated discussion												●		
Registration closes												●		
Collate presentations and circulate evaluation document for comments												●		
Create and circulate **delegate lists**												●		
Create badges												●		
Create delegate packs												●		
Create **delegate certificates** and arrange signing												●		
If available incorporate results from the questionnaire into delegate pack												●		
Send **joining e-mail** to delegates												●		
E-mail final arrangements to speakers plus amended evaluation document												●		

On the week of the event

Task	18/6	19/6	22/6	23/6	24/6	Resp.
Registration set up		●				
Man registration desk			●	●	●	
Check lay out of rooms and reserve speakers seats			●			
Check equipment and microphone		●	●	●	●	
Meet and greet speakers and take through any arrangements for their sessions			●	●	●	
Contact catering team and check everything in hand/brief		●				
Put up any signage and arrange electronic signage			●		●	
Water on podium			●	●	●	
Monitor session time-keeping, flag up 5, 2 and 0 minutes to end			●	●		
Minute facilitated discussion session.			●			
Remind final speaker about feedback form and collect feedback forms			●	●	●	
Load presentations onto USB stick	●		●	●	●	

Week after the event

Task	26/6	29/6	30/6	1/7	2/7	Resp.
Thank speakers	●					
Update websites with presentations and e-mail speakers		●				
Transcribe facilitated discussion			●			
Create feedback log and update with comments from facilitated discussion			●	●	●	
Complete event evaluation			●	●	●	
Upload all event documentation onto wiki for future reference					●	
Write up event report (FB) and make available on websites					●	

C4   Budget (Copenhagen)

	Number	Price	Total		Euro/DKK
Speakers costs					
Total			10,302	see 'Speakers' sheet for specifications	
Venue					
Blixen - KB	3	2,215	6,644		
Blixen - discount	3	-2,215	-6,644		
Small meeting rooms	2	0	0		
Caretaker assistance	3	134	403		
Total			403		
Catering					
Full day arr.	140	47	6,577	Estimated 60/40/40 people	
Total			6,577		
Registration					
Booking service	60	20	1,200		
Total			1,200		
Total expenses			**18,482**		
Delegate rates					
One day only	20	77	1,537		
Three days	40	170	6,783		
Total			8,320		
Surplus			140		
Workshop dinner	50	54	2,685		

	Number	Price	Total		Euro/DKK

Speakers costs

Total			10,302 see next sheet for specifications

Venue

	Number	Price	Total
Blixen - KB	3	2,215	6,644
Blixen - discount	3	-2,215	-6,644
Small meeting rooms	2	0	0
Caretaker assistance	3	134	403
Total			403

Catering

	Number	Price	Total	
Full day arr.	110	47	5,168	Estimated 50/30/30 people
Total			5,168	

Registration

	Number	Price	Total
Booking service	50	22	1,100
Total			1,100
Total expenses			**16,972**

Delegate rates

	Number	Price	Total
One day only	20	80	1,598
Three days	30	174	5,218
Total			6,816

Surplus			145

Workshop dinner	50	54	2,685

Appendix D   Communication and Publicity

D1   Web Text (Copenhagen)

Digital Preservation – The Planets Way

Date: 22-24 June 2009
Venue: Royal Library, Copenhagen, Denmark

See Programme

As more information is created online it has become increasingly important - for regulatory, governance, business continuity, or simply to keep hold of valuable or valued information - to take action to ensure that this information will still be available in ten and more years' time.

Planets (Preservation and Long-term Access through NETworked Services) will host the first in a series of three-day training events in Europe at The Royal Library, Copenhagen on 22-24 June 2009. Digital Preservation – The Planets Way will examine the need to preserve digital content, the action that needs to be taken and the Planets approach to addressing these issues.

Day 1 will consider the case for preserving digital objects, the technical issues involved, the Planets framework, tools and services. On days 2 and 3 delegates will gain hands-on experience of working with Planets and a scenario (sample collection) to develop a preservation plan and preserve objects.

The event will include plenty of opportunity for discussion, sharing ideas and best practice and to ask questions and an example of how the Royal Library of the Netherlands is preserving digital content.

Planets is a joint European project co-funded by the European Commission as part of Framework Programme 6 and delivered by a Consortium of 16 National Libraries, Archives, research and technology institutions. Planets has already released a number of preservation tools that can be used freely and/or downloaded, and by mid 2010 will make available a Preservation Framework and suite of digital preservation tools and services.

Why attend?

- Understand what is involved in preserving digital content
- Learn about the range of services and tools that are available
- Gain hands-on experience of digital preservation and the use of Planets tools
- Obtain skills to use the tools through training and practical exercises
- Opportunity to ask questions and discuss the issues of digital preservation
- Share examples of best practice

Who should attend?

The event aims on Day 1 to educate CEOs, Heads of IT, Curation and Preservation and preservation / curation / IT staff about the issues concerning preserving digital content and about the benefits of Planets. Days 2 and 3 of the event offer an opportunity for digital preservation staff (e.g. librarians, archivists, digital librarians and archivists, repository mangers, software developers, policy managers etc.) to gain hands-on experience of the different Planets tools for characterisation, planning and testing.

Registration

You can register for either Day 1 only at a cost of 80 EUR, or for all three days at a cost of 175 EUR.

Due to the nature of the event there is an upper capacity of 60 delegates on Day 1 and 40 delegates on Days 2 and 3.

Final closing date for all registrations is 11 June 2009.
Morning and afternoon coffee breaks and lunch will be provided and are included in the registration fee.

Participants are encouraged to bring a wireless enabled laptop since there will be practical exercises on Days 2 and 3. Bringing your own laptop also means that you can use the sample collection and exercises after the event.

Venue and Hotels

Information about the venue and hotels in the vicinity, including details of discount rates.

Further information

If you have any further queries or require additional information about this event, please contact: trainingevents@planets-project.eu.
For Planets queries, please contact info@planets-project.eu.
Register for electronic bulletins to stay informed about the Planets project at: www.planets-project.eu/community.

Programme

See programme

Return to the main page for this event

Venue and Hotels

Copenhagen and the Royal Library

Copenhagen has a long history well integrated with today's modern life. The city is a multicultural centre thanks to yesterday's and today's immigration, a fact that contributes to Copenhagen's international atmosphere.

The city is among Europe's oldest and most wonderful capitals with both medieval streets and modern buildings like the newly built Opera House. In Copenhagen you will also find world famous attractions as the "Little Mermaid", the amusement park "Tivoli", the Royal Theatre and the royal palace, Amalienborg, where the royal family resides.

Another pride of the city is the new wing of the Royal Library, The Black Diamond, which was inaugurated in September 1999 by Queen Margrethe. It is clad in Absolute Black granite, mined in Zimbabwe and cut and polished in northern Italy. The fantastic building is right by the waterfront of Copenhagen harbour and is the venue of the Planets Outreach and Training event, "Digital Preservation – The Planets Way" in June 2009.

For more information about Copenhagen, please go to www.visitcopenhagen.com.
The Royal Library was founded by King Frederik III in 1648.The king was a real book-worm and acquired four private libraries. In 1793 the library was opened to the public, and in 1906 the old building on the Isle of Slotsholmen was inaugurated. Since 1989 the Royal Library and the University Library, founded in 1482, have merged into one institution.

Conference Dinner

The conference dinner on Monday 22 June will take place at Restaurant VIVA , a charming and elegant restaurant on a boat by Langebro. The location gives a unique seaside experience with a view to the beautiful Black Diamond of the Royal Library.

A Description of Festivities in Copenhagen

On the 23 June it is Skt. Hans-evening in Denmark. Skt. Hans is the Danish name for St. John and the Danish Midsummer tradition entails bonfire and singing. In the centre of the city, you will have a chance to experience the Midsummer festivities at: Islands Brygge, across the water from the Black Diamond.

Address:

Kulturhuset Islands Brygge

Islands Brygge 18

2300 København S

To see a description of the event, please go to:

Midsummer Eve Copenhagen - Official tourist-site about Copenhagen

For a map of the location, please follow this link.

The bonfire will be lit at 9 PM.

See more events and attractions at http://www.visitcopenhagen.com/

Hotels

The following hotels are all within walking distance of the Royal Library.

Hotel Opera

Tordenskjoldsgade 15

DK-1055 Copenhagen K

Phone: +45 3347 8300

Email: hotelopera@arp-hansen.dk

Best Western Hotel City

Peder Skrams Gade 24

DK-1054 Copenhagen K

Phone: +45 3313 0666

Email: hotelcity@hotelcity.dk

Prices from approx. 1,000 DKK

Clarion Collection Hotel Twentyseven

Løngangsstræde 27

DK-1468 Copenhagen K

Phone: +45 7027 5627

Email: cc.27@choice.dk

Prices from approx. 900 DKK

Hotel Cabinn City

Mitchellsgade 14

DK-1568 Copenhagen V

Phone: +45 3346 1616

Email: city@cabinn.com

Prices from 545 DKK

Hotel Maritime

Peder Skrams Gade 19

DK-1054 Copenhagen K

Phone: +45 3313 4882

Email: hotel@maritime.dk

Prices from approx. 945 DKK

Clarion Collection Hotel Neptun

Sankt Annæ Plads 18

DK-1250 Copenhagen K

Phone: +45 3396 2000

Email: cc.neptun@choice.dk

Prices from approx. 1,100 DKK

Copenhagen Strand

Havnegade 37

DK-1058 Copenhagen K

Phone: +45 3348 9900

Email: copenhagenstrand@arp-hansen.dk

Prices from approx. 900 DKK

Hotel Danmark

Vester Voldgade 89

DK-1552 Copenhagen V

Phone: +45 3311 4806

Email: hotel@hotel-danmark.dk

Prices from approx. 700 DKK

[Scandic Palace Hotel](#)

Raadhuspladsen 57

DK-1550 Copenhagen V

Phone: +45 3314 4050

E-mail: palacecopenhagen@scandichotels.com

From approx. 700 DKK

Many hotels offer a 20% discount if you stay for at least three nights.

Road Description

The Black Diamond at The Royal Library

Søren Kierkegaards Plads 1

1016 Kbh. K

"Digital Preservation – The Planets Way" will take place in the Blixen-room at the Black Diamond.

If arriving by plane:

- take the train to Københavns Hovedbanegård (the Central Station)

The Black Diamond is within walking distance from Københavns Hovedbanegård (the Central Station).

To see the route, please follow [this link](#).

[Scandic Palace Hotel](#)

D2   Mailing 1 (Copenhagen)

*** Apologies for cross-postings ***

You are invited to participate in the Planets Outreach and Training event, 'Digital Preservation – the Planets way' at the Royal Library in Copenhagen, Denmark, on 22-24 June 2009.

The event will consider the challenges of digital preservation and how the Planets tools and framework can assist national institutions with digital preservation.

Registration is now open, and a full event programme and registration form is available on the Planets website at: http://www.planets-project.eu/events/copenhagen-2009/.

Day 1 of the event explores the challenges of digital preservation and introduces the Planets tools and services. On Days 2 and 3 delegates will gain hands-on experience of working with Planets and a scenario (sample collection) to develop a preservation plan and preserve digital objects. The event will include plenty of opportunity for discussion, sharing ideas and best practice and to ask questions.

The event is aimed at CEOs, Heads of IT, Curation and Preservation, IT staff, digital librarians and archivists, curators, policy managers and other staff preparing to or involved in preserving digital content.

You can register for either Day 1 only at a cost of 80 EUR, or for all three days at a cost of 175 EUR.

Due to the nature of the event there is an upper capacity of 60 delegates on Day 1 and 40 delegates on Days 2 and 3.

Final closing date for all registrations is 11 June 2009.

This event is the first in a series of Planets outreach and training events to be hosted at venues across Europe between June 2009 and May 2010.

Planets (Preservation and Long-Term Access through Networked Services) is a four-year project co-funded by the European Union under Framework Programme 6 to address core digital preservation challenges. Planets is building practical tools and services to help ensure long-term access to our digital cultural and scientific assets.

D3   Mailing 2 (Copenhagen)

Digital Preservation – The Planets Way: 22-24 June 2009, Royal Library Copenhagen, Denmark

Apologies for cross-postings

Does your organisation know what to preserve digitally for the future? Do you want to discuss your strategies for digital preservation with colleagues and experts? Do you know how to preserve your collections for the future? Do you know which tools and services to use for this?

There has been an explosion in the volume of information world-wide which will grow to 180 exabytes by 2011. But if action is not taken, that information can be lost within five to ten years.

Digital Preservation – The Planets Way is an opportunity to understand what may be done to manage digital content for the long-term. The Planets project invites you to take part in the three-day training event which will be presented by members of the Planets project and established experts in the field of digital preservation. The event will take place at the striking Royal Library in Copenhagen on 22-24 June – and is also an opportunity to visit Denmark's capital during the Midsummer's Eve celebrations!

The event has been subsidised to enable attendance. For the cost of 80 EUR to attend day one and 175 EUR to attend all three days, the event will help you to make a start with, or advance, digital preservation activities in your organisation.

Planets delivers a sustainable framework to enable archives, libraries and other large collection holders to approach digital preservation confidently and effectively. The Planets framework and tools, which range from preservation planning to preservation action and the use of a testbed environment, will be presented in full for the first time. The event will give you an insight into the activities involved in preserving digital content and an opportunity to work with Planets tools, with the help of their designers, programmers and developers!

On **Day 1** you, as a decision-maker or preservation staff, will get an understanding of the case for digital preservation, the benefits versus the costs, the activities involved and how preservation and Planets may fit into management activities. Keynote speaker, Dr. Ross King, Austrian Research Centres, and Clive Billenness, Programme Manager, Planets, will discuss digital preservation and its role in general risk management. The National Library of the Netherlands will explain how it is preserving its digital collections.

Days 2 and **3** are an opportunity to meet and learn from the experts, creators and developers of Planets. Using a sample collection, there will be the chance to gain hands-on experience of Planets

tools and services. There will also be plenty of opportunity to ask questions, network with peers and to take home tools and exercises!

You can see the full programme and register at http://www.planets-project.eu/events/copenhagen-2009/.

Due to the nature of the event there is an upper capacity of 60 delegates on Day 1 and 40 delegates on Days 2 and 3.

If you have any questions about the event, please send an email to trainingevents@planets-project.eu.

We look forward to seeing you in Copenhagen!

D4   Final Reminder (Copenhagen)

REMINDER - Invitation to Planets event 'Digital Preservation - The Planets Way'

*** Apologies for cross-posting ***

Dear all,

This is a final reminder for the Planets outreach and training event 'Digital Preservation - The Planets Way' at the Royal Library in Copenhagen on 22-24 June 2009. Besides giving you a better understanding of the processes of digital preservation this event offers a unique opportunity to meet and engage with digital preservation colleagues from all over Europe and with developers of Planets digital preservation tools.

- Dates: 22-24 June 2009
- Registration deadline: 11 June 2009.
- Registration fee: Day 1 €80, Days 1-3 €175.
- Venue: The Royal Library, Copenhagen, Denmark

For more information and registration, please go to
www.planets-project.eu/events/copenhagen-2009/

D5   Web News Piece (Copenhagen)

Planets will host a three-day outreach and training event at The Royal Library, Copenhagen on 22-24 June 2009. The event will explore the need to preserve digital content, the action that needs to be taken and the Planets approach to addressing these issues.

The first day of the event will focus on the challenges of digital preservation and introduces the Planets tools and services. On days two and three the delegates will gain hands-on experience of working with Planets and a scenario (sample collection) to develop a preservation plan and preserve digital objects. The event will include plenty of opportunity for discussion, sharing ideas and best practice and to ask questions.

D6   Mailing list excerpt

Planets Distribution Channels			
Mailing Lists - UK JISC Lists			
Name	**Owner**	**Web**	**E-mail**
AHDS-ALL	JISC		AHDS-ALL@jiscmail.ac.uk
AHDS-DISCUSS	JISC		AHDS-DISCUSS@jiscmail.ac.uk
ARCHIVES-NRA	JISC		ARCHIVES-NRA@jiscmail.ac.uk
			ARCHIVES-WALES@jiscmail.ac.uk
ART-TECHNOLOGY	JISC		ART-TECHNOLOGY@jiscmial.ac.uk
BISA	JISC		
BUSINESS-PROCESS-MANAGEMENT	JISC		BUSINESS-PROCESS-MANAGEMENT-request@jiscmail.ac.uk
CLIN-LIB	JISC		CLIN-LIB-request@jiscmail.ac.uk
DCC-DEVELOPMENT	JISC	www.jiscmail@ac.uk	dcc-development@jiscmail.ac.uk
DC-PRESERVATION	JISC	www.jiscmail@ac.uk	dc-preservation@jiscmail.ac
DIGI-EVAL	JISC	www.jiscmail@ac.uk	Digi-eval@jiscmail.ac.uk
DIGITAL-ARTS-FORUM	JISC		DIGITAL-ARTS-FORUM@jiscmail.ac.uk
DIGITAL-PRESERVATI	JISC		DIGITAL-PRESERVATION@jiscm

ON			ail.ac.uk
DMRN-LIST	JISC		DMRN-LIST@jiscmail.ac.uk
E-BUSINESS	JISC	www.jiscmail@ac.uk	E-BUSINESS-request@jiscmail.ac.uk
E-DOCUMENTM ANAGEMENT	JISC		E-DOCUMENTMANAGEM ENT-request@jiscmail.ac.uk
E-FRAMEWORK	JISC	www.jiscmail@ac.uk	e-framework@jiscmail.ac.u k
E-GOVERNMEN T	JISC	www.jiscmail@ac.uk	egovernment@jiscmail.a c.uk

D7   Event Flyer

Digital media...

The dominant way that we create, shape, and exchange information. Unlike paper we have limited abilities to ensure that today's digital information will be accessible in 10, 50, or 100 years. Unless we act now, we could lose access to the early decades of the digital era, and future generations will see a gaping hole in their cultural and scientific record.

The Planets programme is a series of workshops which will allow delegates to gain an in-depth understanding of the technical challenges that are presented by digital preservation and how the Planets framework operates in order to provide solutions to these issues. The three-day events will also give delegates the opportunity to obtain practical, hands-on experience of using the Planets suite of tools and services to gauge how the technology could best be used by their individual institution or company.

Day One will provide an introduction to digital preservation and the Planets suite of tools and services.

Days Two and Three delegates will work through a scenario using Planets tools to preserve a sample collection.

The five events will take place across Europe between May 2009 and 2010. Delegates can register for Day One only, or all three days.

Copenhagen   22 – 24 June 2009
Sofia   21 – 23 September 2009

Venues and dates will follow for events in: Bern, London and Rome.

For further information on the events, please visit the Planets events website www.planets-project.eu/events/

If you would like to be kept up-to-date with Planets news, please register at www.planets-project.eu/community

planets

Appendix E   Supporting Materials

E1   Pre-reading list excerpt (Copenhagen)

Suggested Readings for "Digital Preservation - The Planets Way" 22-24 June

Introduction to Preservation and Planets

The Open Archival Information System Reference Model

Brian F. Lavoie, OCLC Online Computer Library Center

This report provides a brief history of the OAIS reference model and an introduction to the three separate but related parts that constitute a OAIS compliant archive. The first part describes the external environment within which the OAIS operates; the second part describes the functional components, or internal mechanisms, which collectively fulfill the OAIS's preservation responsibilities. The third part describes the information objects which are ingested, managed, and disseminated by the OAIS.

[report, 20 pages, PDF, 372KB]

Planets: **Integrated** Services for Digital Preservation

Adam Farquhar, Helen Hockx-Yu, The British Library

This article introduces the motivation for the Planets project, describes the extensible technical architecture and places the Planets approach into the context of the Open Archival Information System (OAIS) Reference Model. It also provides a scenario demonstrating Planets' usefulness in solving real-life digital preservation problems.

[paper, 12 pages, pdf, 290KB]

Modelling Organisational Preservation Goals

Angela Dappert, Adam Farquhar, The British Library

This paper introduces a conceptual model for expressing the core concepts and requirements that appear in preservation guiding documents. It defines a specific vocabulary that institutions can reuse for expressing their own policies and strategies. In addition to providing a conceptual framework, the model and vocabulary support automated preservation planning tools through an XML representation.

[paper, 8 pages, PDF, 152KB]

How to Choose a Digital Preservation Strategy

Stephan Strodl, Christoph Becker, Robert Neumayer, Andreas Rauber, Vienna University of Technology

This paper presents the Planets Preservation Planning approach. It provides an approved way to make informed and accountable decisions on which solution to implement in order to optimally preserve digital objects for a given purpose. It is based on Utility Analysis to evaluate the performance of various solutions against well-defined requirements and goals. The viability of this approach is shown in several case studies for different settings. The paper presents its application to two scenarios of web archives, two collections of electronic publications, and a collection of multimedia art.

[paper, 10 pages, PDF, 503KB]

Significance is in the Eye of the Stakeholder

Angela Dappert, Adam Farquhar, The British Library

The concept of significant characteristics has become prominent within the digital preservation community to capture the key goal of preserving the most relevant aspects of the content of a digital object, even at the cost of sacrificing less important ones. However, the term has become over-loaded and very often it remains ill-defined. In this paper, the domain of significant characteristics is analyzed, and a clear terminology is introduced.
[paper, 12 pages, PDF, 132KB]

Digital Preservation - The Planets Way

Pre-questionnaire

We kindly ask you to fill out this questionnaire as part of the preparations for the event 'Digital Preservation – The Planets Way' in Copenhagen on 22-24 June. All answers will be held confidentially and will be used only to help organisers and lecturers to understand the expectations of the delegates and to structure the training the best possible way.

You can print out the empty questionnaire from here if you wish to be able to see the questions before answering electronically. Thank you for your time!

About you

1. Name and affiliation (optional)

2. What type of organisation do you work for?

☐	National Library	☐	Business/industry
☐	Provincial Library	☐	Media
☐	National Archive	☐	Vendor or software developer
☐	Provincial Archive	☐	Repository provider
☐	National Museum	☐	Systems developer
☐	Provincial Museum	☐	Consultancy, publisher or training
☐	Academic Institution	☐	Other
☐	Government		
☐	Public Sector Organisation		If other, please specify:

3. What is your function?

Please specify eg. librarian, digital archivist, software developer, researcher etc.

4. Will you be attending Day 1 only or Days 1-3?

☐   Attending Day 1 only

☐   Attending Days 1-3

About digital preservation

5. Does your organisation have a digital preservation policy?

☐   Yes

☐   No

If yes, is the policy reviewed:

☐   Annually or more frequently?

☐   Every 2-5 years?

☐   Has not been reviewed yet?

6. Does your organisation have a budget for digital preservation?

☐   Yes

☐   No

7.   Does digital preservation feature in your:

                                        Yes No

☐   Operational planning

☐   Financial planning

☐   Business-continuity planning

8.   Please describe your plans for the long-term management of digital information:

☐   Assessing needs with a consultancy or prototype

☐   Tendering for a solution

☐   Long-term solution in development

☐   Long-term solution in place

☐   No plans

9. From which types of source system do you or will you take digital information which requires long-term management?

                                                    Now?   In 10 years' time?

☐   File system

☐   Electronic Document Management System (EDMS)

☐   E-mail system

☐   Computer Aided Design (CAD)

☐   Lab systems

☐   Media store

☐   Document scanning programme

☐   ERMS database

☐   Internet

         Others, please specify:

10. What types of digital information require long-term management in your organisation?
Please tick all that apply.

☐   Documents

☐   Audio

☐   Images

☐   Video

☐   eBooks

☐   eJournals

☐   Scientific data

☐   Databases

☐   GIS

☐   ISO or disc images

☐   Software

☐   Websites

☐   E-mails

Others, please specify

How do you expect this to change over the next ten years?

11. How much digital information do you store:

	Now	**In ten years' time**

- ☐   Less than 20TB
- ☐   20-100TB
- ☐   100TB-1PB
- ☐   More than 1PB

About the training event

12. My interests in this training event / I would like to get the following from the training:

13. Anything else you would like to add that hasn't been asked?

Thank you!

Your answers will be submitted when you press the X.

If you wish to print a copy of your answers, please press the print icon

E3   Delegate Pack

E3.1   Excerpt from session abstracts (Copenhagen)

Why do we have to plan preservation solutions?

Christoph Becker, Vienna University of Technology

The rapid technological changes in today's information landscape have considerably turned the preservation of digital information into a pressing challenge. A lot of different strategies, i.e. preservation actions, have been proposed to tackle this challenge. However, which strategy to choose, and subsequently which tools to select to implement it, poses significant challenges. The creation of a concrete plan for preserving an institution's collection of digital objects requires the evaluation of possible preservation solutions against clearly defined and measurable criteria. Preservation planning aids in this decision-making process to find the best preservation strategy considering the institution's requirements, the planning context and possible actions applicable to the objects contained in the repository. Performed manually, even evaluating a rather small number of possible solutions against requirements takes a good deal of time. Plato, a web-based, interactive software tool, supports and partly automates this process.

This series of presentations and exercises will

- Discuss the needs of preservation planning,
- Review the preservation planning methodology and workflow,
- Show how to quantify and measure requirements,
- Discuss examples coming from case studies,
- Demonstrate how Planets tools and services aid in the requirements definition and evaluation process,
- Utilise the range of services and tools Planets is delivering, and
- Engage participants in group discussions on requirements for selected digital objects.

E3.2   Excerpt from speaker biographies (Copenhagen)

Christoph Becker

Christoph Becker is PhD researcher at the Department of Software Technology and Interactive Systems, Vienna University of Technology. Since 1998 he has worked as an independent IT consultant and software architect on a wider range of IT projects. Christoph graduated with an MSc in Economics and Computer Science from the Vienna University of Technology in 2007 and with an MSc and BSc in Computer Science in 2006 and 2004 respectively. He has been involved in research projects and published research papers at international conferences relating to Digital Preservation. His special interest is Preservation Planning. Christoph is a member of Planets' Scientific Board and advisor to its Technical Coordination Committee.

E3.3   Excerpt from session abstracts (Copenhagen)

Why do we have to plan preservation solutions?
Christoph Becker, Vienna University of Technology

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Appendix F   Evaluation and Measurement

F1   Evaluation Plan

Digital Preservation – The Planets Way
The Royal Library, Copenhagen
22-24 June 2009

Event Evaluation and Measurement Plan

Planets will present a three day Outreach and Training Event: Digital Preservation – The Planets Way at the Royal Library, Copenhagen on 22-24 June.

The outreach and training event is on Day one intended to be an overall introduction to digital preservation and Planets tools. Days two and three are intended to be practical training days on developments in digital preservation and Planets technology, tools and services and to include real-life as well as conceptual examples of work. It is structured to be stimulating and to equip delegates with information, skills, and examples that will help them and their organisations to preserve digital content and use Planets tools in that process.

Digital Preservation – The Planets Way aims to attract up to 60 delegates on Day one and up to 40 delegates on Days two and three representing organisations in the Nordic Countries and Europe.

The event supports the DT10 Task 6 and the DT6 Task 6 set out in the Rolling Implementation Plan and supports the Planets Key messages where as Planets is addressing the challenge of long-term preservation of digital content.

Digital Preservation – The Planets Way
– Objectives

Delegates participating in Day one of the event should:

- Obtain an awareness of the digital preservation problems and issues
- Be presented to actual working solutions and obtain knowledge about what Planets has developed
- Obtain an awareness of Planets framework, tools and services and what they have to offer

Delegates participating in Days two and three of the event should furthermore:

- Obtain the skills they need to use the tools through training and hands-on practical exercises
- Obtain the knowledge of Planets technology and how to adopt Planets in their organisations
- Have an opportunity to engage in deeper discussions (community of best practice)
- Have an opportunity to provide input for further developments of Planets tools
- Be able to visualise Planets within their digital preservation strategy

Why evaluate?

Evaluation of the event will provide evidence to Planets which will make it possible to determine:

- How far the event has met the objectives set and delegates' requirements
- Monitor progress towards outreach objectives for Planets
- Inform design of the series of Planets training events in 2009 and 2010 in the light of needs and feedback
- Input feedback into the project

Targets and Measures

The targets for the event are:

- Attendance by 50 or more delegates for Day one (max. 60 delegates)
- Attendance by 30 or more delegates on Days two and three (max. 40 delegates)

70 per cent of attendees rate the event as good or better:

- Against the criteria in the feedback form which is based on the objectives of the event.
- In meeting delegates needs and expectations

70 per cent of attendees rate each of the components of event design as good or better:

- Speakers
- Content/presentations
- Structure and pace of the event
- Reading and documents
- Venue and catering
- Logistics/organisation
- Booking/administration
- Communication

Evaluation will also allow delegates to feedback on individual sessions.

Communication

The Evaluation Report will be disseminated among organisers and speakers within Planets. It will be available to project management. The evaluation will be used to inform future events. A short summary of user requirements and feedback will be available to Planets partners.

F2   Attendee feedback form

Digital Preservation – The Planets Way
The Royal Library, Copenhagen
22-24 June 2009

Feedback Form

Please can you fill in the feedback form and hand it to one of the organisers as you leave.

ABOUT YOUR ATTENDANCE

Did you attend one day or three days?
❐   Attended Day 1 only
❐   Attended all three days

ABOUT YOU

What type of organisation do you work for?
❐   National Library   ❐   Public Sector Organisation
❐   Other Library   ❐   Business/industry
❐   National Archive   ❐   Media
❐   Other Archive   ❐   Vendor or software developer
❐   National Museum   ❐   Repository provider
❐   Other Museum   ❐   Systems developer
❐   Academic Institution   ❐   Consultancy, publisher or training
❐   Government

Other (please specify)

_____

What is your function?
(Please specify e.g. CEO, librarian, digital archivist, software developer, researcher etc)

_____

ABOUT THE EVENT

Please rate you response to the following (where **1** is **poor** and **5** is **excellent**; **N/A** is not applicable): The event has given me:

	1	**2**	**3**	**4**	**5**	**N/A**
1. An understanding of why to preserve digital content and the issues associated with preservation planning, policy and strategy setting and executing preservation	❐	❐	❐	❐	❐	
2. An introduction to the preservation planning cycle, Planets framework, technology, tools and services and what they have to offer	❐	❐	❐	❐	❐	
3. An understanding of the way organisations approach preservation of digital content by using Planets tools and services	❐	❐	❐	❐	❐	
4. An opportunity to engage in discussion, share ideas and best practice and to build contacts in organisations with a need to preserve digital content	❐	❐	❐	❐	❐	
5. Practical skills to plan to preserve digital content and to use Planets tools and services	❐	❐	❐	❐	❐	❐
6. Has helped me to see how Planets may fit into my organisation's digital preservation strategy and activities	❐	❐	❐	❐	❐	
7. An opportunity to ask questions and provide input into further developments of Planets.	❐	❐	❐	❐	❐	❐
8. The event has met my expectations?	❐	❐	❐	❐	❐	

If not, why not?

_____
____

	1	**2**	**3**	**4**	**5**	
9. I would consider using Planets in my organisation?	❐	❐	❐	❐	❐	

If not, why not?

_____
____

10. I would expect to attend similar events ❏ ❏ ❏ ❏ ❏
    in the future

ABOUT THE EVENT ORGANISATION

Please rate the following aspects of event organisation (where **1** is **poor** and **5** is **excellent**; **N/A**   is   not   applicable):

	1	**2**	**3**	**4**	**5**	**N/A**
1. Speakers (*see following pages*)	❏	❏	❏	❏	❏	
2. Content of the sessions	❏	❏	❏	❏	❏	
3. Content of the exercises	❏	❏	❏	❏	❏	❏
4. Structure and pacing	❏	❏	❏	❏	❏	
5. Pre-reading and documents	❏	❏	❏	❏	❏	
6. Venue and catering	❏	❏	❏	❏	❏	
7. Organisation/Logistics	❏	❏	❏	❏	❏	
8. Administration	❏	❏	❏	❏	❏	
9. Communication	❏	❏	❏	❏	❏	

YOUR COMMENTS

What did you like best about the event?

What else would you have liked to have seen covered?

What could we have done better?

GETTING INVOLVED

Please indicate if you would like us to contact you with information about how you can be informed or involved in Planets development.

☐

Name:

_____

Organisation:

_____

E-mail:

_____

Telephone:

_____

OTHER

How did you hear about the workshop?

_____
_____

What motivated you to attend?

_____

If you would like to comment on individual sessions, please continue on next page.
Thank you for your help.

DAY 1 - SPEAKERS AND SESSIONS

Please rate the following aspects of event organisation (where **1** is **poor** and **5** is **excellent**;

	1	2	3	4	5
Introduction to Digital Preservation: Why Preserve Ross King, Austrian Research Centers	❏	❏	❏	❏	❏
The Preservation Action Cycle: Introduction to Planets Clive Billenness, British Library	❏	❏	❏	❏	❏
Preserving Digital Content Volker Heydegger, University at Cologne	❏	❏	❏	❏	❏
Why do we have to plan preservation solutions? Christoph Becker, Vienna University of Technology	❏	❏	❏	❏	❏
Digital Preservation: How to preserve Sara van Bussel, The National Library of the Netherlands	❏	❏	❏	❏	❏
Tools: How to understand files Jan Schnasse, University at Cologne	❏	❏	❏	❏	❏
Digital Preservation: How to verify Petra Helwig, The National Archives of the Netherlands	❏	❏	❏	❏	❏
Digital Preservation: How to Plan Christoph Becker	❏	❏	❏	❏	❏
Tools: How to integrate the Components of Digital Preservation Ross King, Austrian Research Centers	❏	❏	❏	❏	❏
Case study Barbara Sierman, The National Library of the Netherlands	❏	❏	❏	❏	❏

Feedback

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DAY 2 - SPEAKERS AND SESSIONS

Please rate the following aspects of event organisation (where **1** is **poor** and **5** is **excellent**;

	1	2	3	4	5	N/A
Introduction to the Digital Preservation Scenario and to a "real collection" Vittore Casarosa, HATII at the University of Glasgow	❏	❏	❏	❏	❏	❏
Preservation Planning with Planets Hannes Kulovits and Christoph Becker, Vienna University of Technology	❏	❏	❏	❏	❏	❏
Characterisation of Digital Documents Volker Heydegger and Jan Schnasse, University at Cologne	❏	❏	❏	❏	❏	❏
Preservation Actions Sara van Bussel, The National Library of the Netherlands	❏	❏	❏	❏	❏	❏
Benchmarking Preservation Tools: the Testbed Environment Petra Helwig, The National Archives of the Netherlands and Brian Aitken, HATII at the University of Glasgow	❏	❏	❏	❏	❏	❏

DAY 3 - SPEAKERS AND SESSIONS

	1	2	3	4	5	N/A
Finalising a Preservation Plan Hannes Kulovits, Vienna University of Technology	❏	❏	❏	❏	❏	❏
Experiencing the Testbed Environment Brian Aitken, HATII at the University of Glasgow	❏	❏	❏	❏	❏	❏
Pulling it all together: Implementing Digital Preservation using the Planets Interoperability Framework Clive Billenness, British Library	❏	❏	❏	❏	❏	❏

Feedback

F3   Event evaluation report

Preservation Planning: Principles, Examples and the Future with Planets
The British Library Conference Centre
29 July 2008
Event Evaluation and Measurement

Planets and the Digital Preservation Coalition (DPC) hosted a joint outreach workshop at the British Library on 29 July 2008. The event was targeted at members of organisations with an interest in encouraging long-term preservation of digital content. These included: the DPC, Joint Information Systems Committee (JISC), SURFoundation Netherlands, Caspar, Digital Preservation Europe, Protage, Shaman and the Digital Curation Centre.

This document sets out evaluation of feedback from delegates against the event objectives with recommendations for future events (Appendix 1). Feedback forms (Appendix 2) were submitted by 45 per cent of delegates.

Success Criteria

The objectives of the Principles, Examples and Future with Planets event were to provide delegates with:

- An understanding about the issues associated with planning to preserve digital content, policy and strategy setting
- A sound conceptual and practical introduction to the Planets technology, tools and services
- Insight into using Planets tools such as Plato, identifying the characteristics of digital objects and working in a test bed environment
- Insight into the way organisations approach the process of planning to preserve digital objects
- An opportunity to share ideas, input feedback on their requirements and to the development of the projects
- An opportunity to build links with colleagues in digital preservation organisations

Success criteria were set at:

- Attendance by 40 or more delegates representing target user and supplier communities
- 70 per cent of attendees rate the event as good or better at achieving targets set

- 70 per cent of attendees rate components of event design as good or better

At a Glance

The following table summarises feedback against each core objective plus variation. (Negative variation against targets is shown in red.) Percentages denote the proportion of delegates rating the event good or better at meeting the criterion.

	Understanding issues (%)	Introduction to Planets (%)	Introduction to tools (%)	Understanding approaches (%)	Share ideas and feedback (%)	Build contacts (%)	Met expectations (%)	Would attend again (%)	Speakers (%)	Content (%)	Structure (%)	Pre-reading (%)	Venue and catering (%)	Organisation and logistics (%)	Administration (%)	Communication (%)
Target	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70
Actual	85	75	60	50	50	65	90	75	100	80	55	64	75	85	95	95
Variation	15	5	10	20	20	5	20	5	30	10	15	6	5	15	25	25

Evaluation

Audience Composition

The event aimed to attract 40 delegates. Forty-eight delegates registered and forty-three attended.

Those responsible for digital collections (archivists, curators and librarians) made up 26 per cent of delegates. Archivists accounted for a further 19 per cent, librarians 16 per cent and researchers nine per cent. IT managers, managers and consultants accounted for 7 per cent, 5 per cent and 5 per cent respectively. The remainder were made up of records managers, curators, project management, risk and copyright managers.
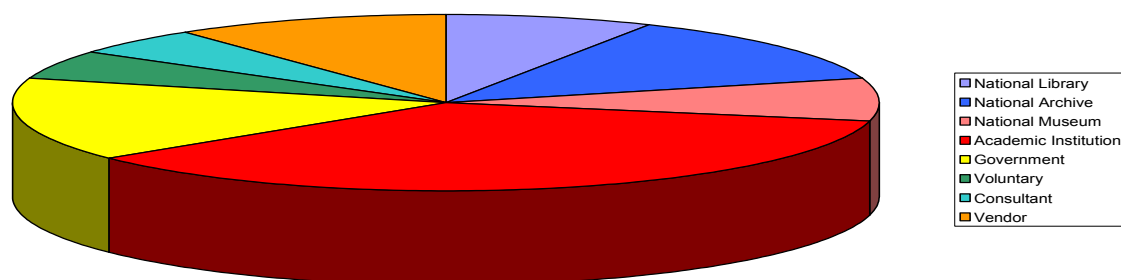
Job Titles

Organisation

Over two-fifths (41 per cent) of delegates came from academic institutions. Fifteen per cent came from national archives and 13 per cent from government or the public sector. A further eight per cent came from both national museums and the charitable sector. The remainder of delegates represented national museums, commercial developers and service providers.
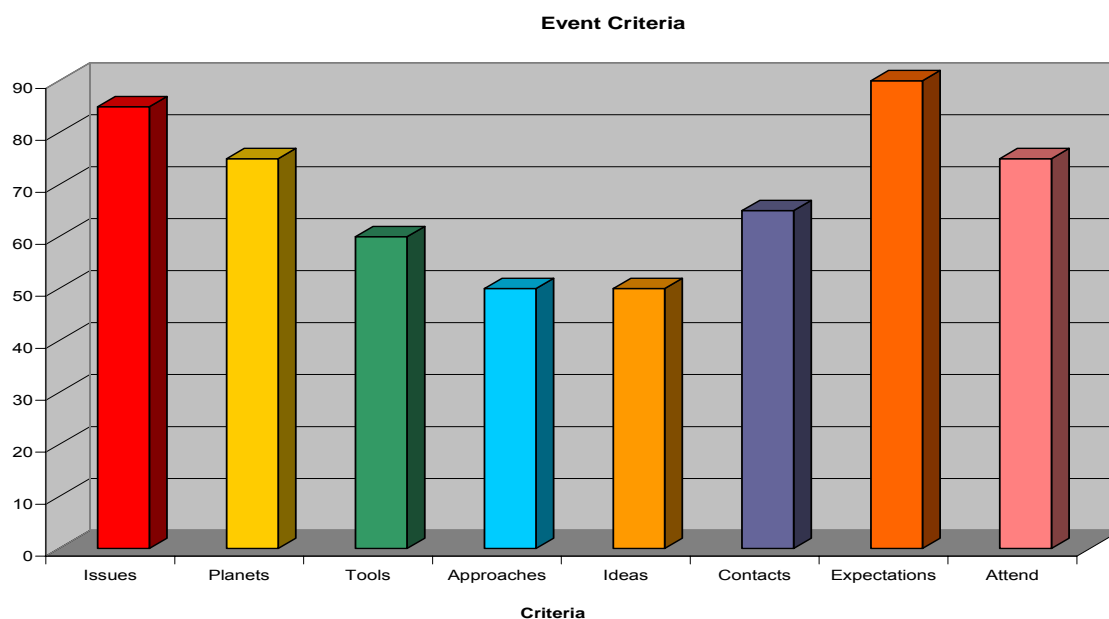
Organisation

About the Event

Delegates were asked to rate aspects of the event on a five point scale against objectives where 1 is poor and 5 is excellent. The event met or exceeded expectations against 10 of 16 criteria. The event scored especially highly on providing an understanding of the issues associated with preservation of

digital objects (85 per cent), introducing Planets (75 per cent) and meeting audience expectations (75 per cent).

The event scored less well on providing delegates with an insight into how organisations preserve digital content (50 per cent), the opportunity to input ideas and feedback (50 per cent) and an understanding of specific preservation tools (60 per cent).
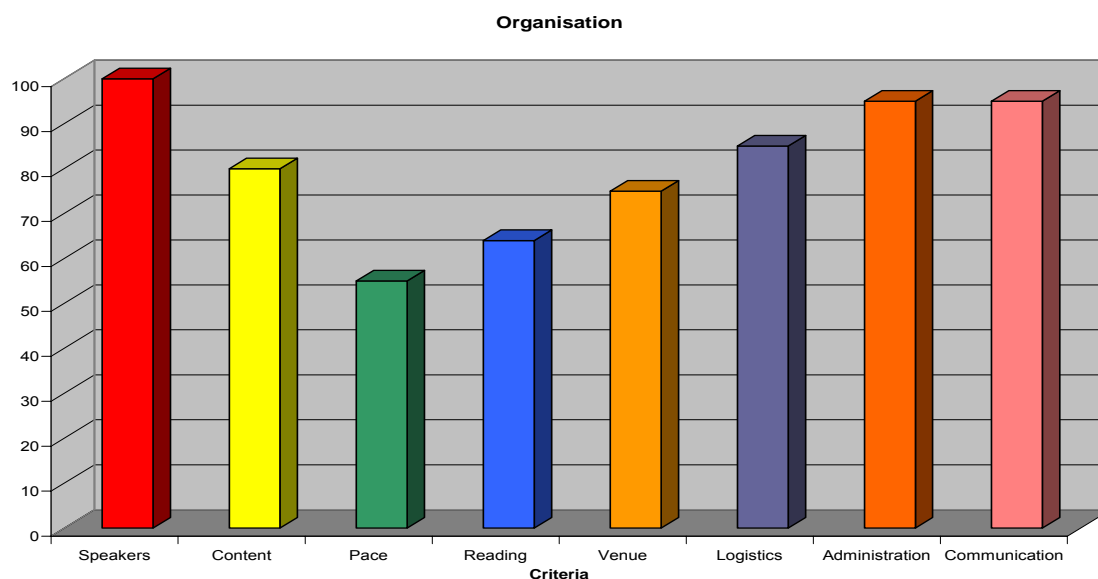
Event Criteria

Event Organisation

The event met six of eight organisational targets. All delegates thought the speakers were good or better. The workshop scored highly on administration (90 per cent), communication (90 per cent), logistics (85 per cent) and content (80 per cent).
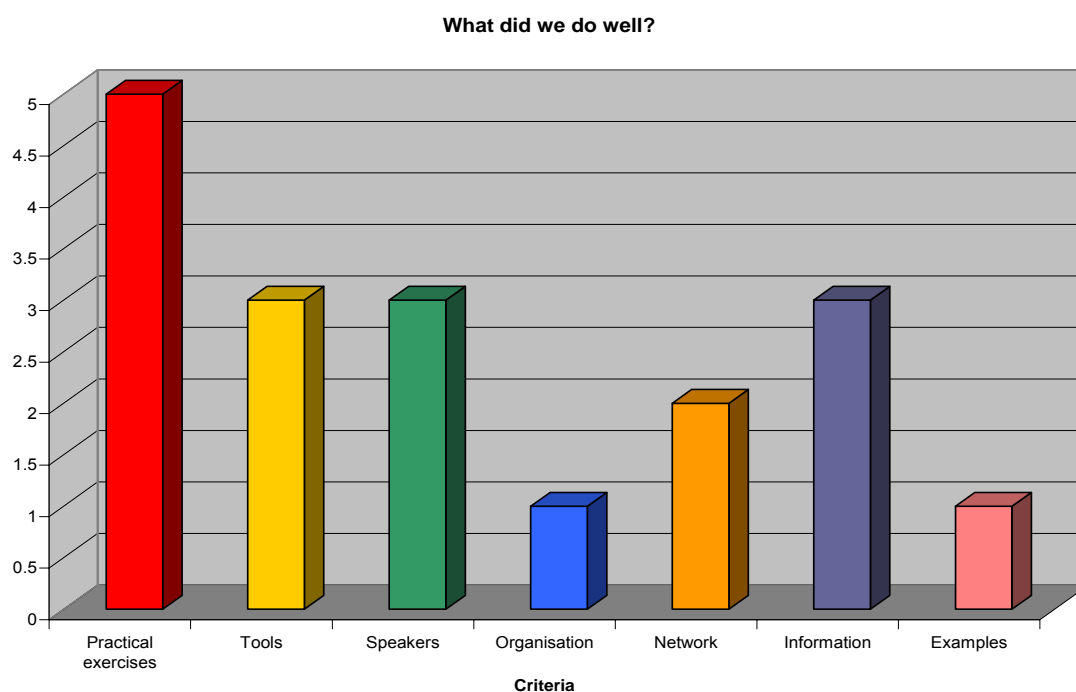
It fell short in two areas: structure and pace (55 per cent) (see below) and the quality of printing of pre-reading materials, which delegates found difficult to read.
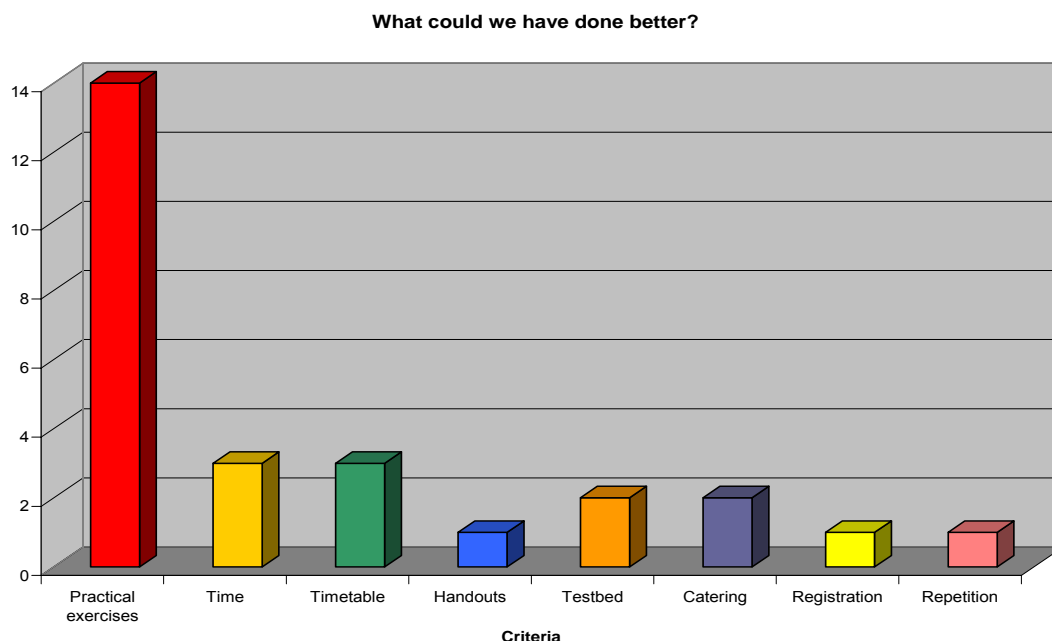
Organisation

Qualitative Feedback

Qualitative feedback provides us with some insight into the figures. Respondents thought the event performed well in providing practical demonstrations of techniques and a chance to see Planets tools in action. They found the speakers and content to be informative and interesting. Other factors which received positive comments included the case studies, a chance to network with colleagues and the event's organisation.

What did we do well?

Respondents said they would like to have seen covered organisational issues, issues relating to access to digital content and examples of how tools have been used in organisations.

What could we have done better?

A large number of comments (14) were received about the practical demonstrations. While these, along with the quality of speakers and information, were the aspect of the event that respondents liked, they suggested a number of ways that these sessions could be developed.

Respondents asked for a clear briefing at the start of the exercises so that they can get straight to work on the tasks. Recommendations included a slide with their scenario and an A4 handout listing the criteria they should be considering when building an objective tree.

Respondents would have liked more time to be devoted to the mind-mapping exercises and demonstrations. They suggested that the exercises may benefit from fewer, larger groups and a feedback gathering session at the end.

Three respondents commented on the pressure on the timetable overall and the amount of material that the event tried to cover. Respondents suggested that the testbed demonstration could be shorter and the testbed and characterisation sessions possibly be less technical for delegates inexperienced in preserving digital content.
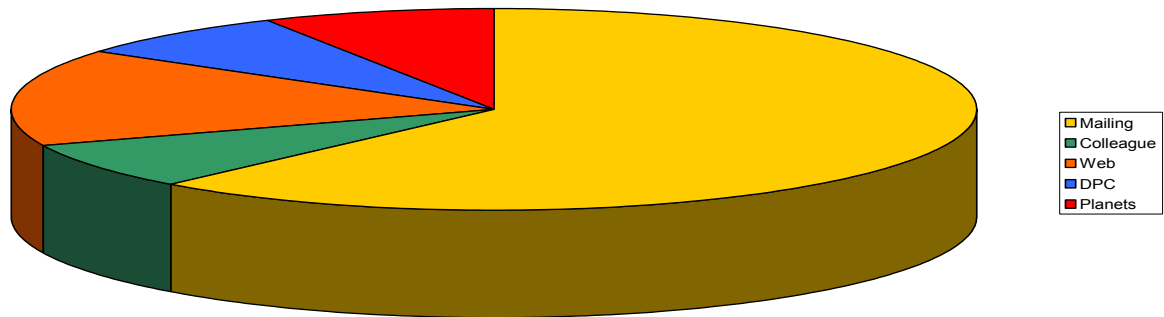
Catering could have met the needs of vegetarians better and that queues needed to move more quickly during breaks.

Communication

The majority of respondents (66 per cent) had learned about the workshop from a mailing list. Others picked up information from Planets/DPC websites or directly from the DPC.

Communication

Half of respondents attended because they were responsible for preservation of digital content. Others wanted a better understanding of digital preservation or to help raise awareness of their line manager or had attended a previous event.

Summary and Recommendations

The event was well-received. Delegates found the speakers and content to be of consistently high standard. As with previous events, delegates appreciated the practical exercises and an opportunity to see tools in action. They also appreciated the inclusion of real-life case studies and chance to network with colleagues.

Respondents have consistently commented on trying to cover too much material in the time available. One delegate suggested that events would benefit by being targeted at specific user groups such as archivists, which would allow content to be tailored.

The pre-event registration activity could usefully ask delegates to complete brief 'About you' details. This will make it possible for them to indicate their experience of preserving digital objects, previous courses they have attended and their expectations of the event. The information will help organisers and speakers to structure content and progress through the workshop.

Practical sessions will benefit from an introduction which sets out the scenario, exercise and criteria to be considered. Delegates find these sessions especially useful. Future workshops should allocate more time to practical work. Exercises would benefit from time being set aside for delegates to feedback and discuss findings.

Both testbed and characterisation sessions scored highly. It may be helpful to provide a less technical introduction to these aspects of digital preservation. Depending on the numbers at events, it may be worth considering parallel tracks eg. for beginners and technically experienced delegates.

Future events should make provision to serve drinks to maximise the time available for networking.