

# JISC DEVELOPMENT PROGRAMMES

## Project Document Cover Sheet

### FINAL REPORT - DPTP

#### Project

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# JISC/DPTP : final report

## Title Page

Digital Preservation Training Programme - Final Report from Phase I

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## Acknowledgements

This project was funded by JISC under the Institutional Digital Preservation and Asset Management Programme 2004 (also known as the 4/04 programme.) We gratefully acknowledge their support, and that of the programme manager, Helen Hockx-Yu. ULCC were partnered in the UK by the Digital Preservation Coalition, and I am particularly grateful to its past Executive Secretary, Maggie Jones, without whom this project would not have begun. We also benefited from an effective working relationship with Cornell University, and in particular from their generosity in making all of their training material, developed over the course of a number of years, available to us.

I would also like to express my thanks for the contributions made to this project by staff in the Digital Archives Group at ULCC.

## 1 Executive Summary

The project's aim was to take the one-week intensive training course which Cornell had already developed and adapt it for UK needs in two ways. The first adaptation involved taking material which was USA-specific (such as that relating to copyright law) and replace it with material specific to the situation in the UK and Europe. The second adaptation was to rework some of the material, and develop new modules, to address the requirements identified in the UK training needs report (see the Background section for more information on this.) Having made these changes, the project was then funded to deliver one pilot course, with no tuition fees for attendees, and conduct detailed follow-up evaluation on its success. We were then to amend the content as necessary and deliver the course on up to a further 3 occasions, covering

the costs of delivery from course fees.

One of the UK-specific adaptations we chose was to make use of the online Handbook *Preservation Management of Digital Materials* (Jones & Beagrie, 2001) and update some of its content to reflect a changing landscape and specific needs of the course.

We succeeded in all of these aims, although market conditions meant we were only able to run the course on 2 further occasions rather than 3, neither with full attendance. Independent evaluation, and our own, indicated that the course was extremely well received and it has been assessed as offering very good value. However, there are questions about how many institutions are able to release staff for a one-week course, despite the undoubted benefits that such intensive training offers over the DPC's previous one-day events. We will be continuing to develop the course materials and exploring other

## 2 Background

The background to the project was set out in the original funding proposal, from which the following is directly quoted.

A major challenge facing all HE (and other) institutions is the need to equip staff with the skills and confidence to be able to embark on a pragmatic and cost-effective digital preservation programme appropriate to their own institutional needs. While there is a wealth of information available on technical, organisational, and legal issues to be considered, there is a significant gap in training courses designed to provide practical support to those who are already dealing with increasing quantities of digital material, at least some of which they will need to look after themselves. This takes on an increasing sense of urgency as the volume and complexity of digital materials rapidly increases, the dependence on them for teaching and research increases, but the long-term infrastructure capable of assigning authoritative responsibility for agreed classes of materials is progressing slowly. The net result of this combination is that institutions cannot afford to wait until long-term challenges have been fully addressed. This will mean at best a lengthy delay and indeed as the long-term agenda is likely to be a constantly evolving development, it could result in a permanent state of deferral. Waiting for a national solution will inevitably result in the loss of much valuable data as a key aspect of digital materials is the need to manage them as early in their lifecycle as possible. Effectively managing digital materials needs to be embedded within institutions rather than viewed as outside the scope of normal activities.

Despite the lack of concrete long-term solutions, a number of effective strategies exist which individual institutions can adopt immediately, and which will provide them with a managed approach for the short to medium term. These can be tailored to individual institutional needs, priorities and budgets. Much can be achieved by relatively modest changes in managing materials and there is an urgent need to provide support and training in these principles and techniques. Despite numerous efforts at awareness-raising, there is still much misunderstanding about digital preservation and it has acquired a mystique which suggests to many that it needs to be the sole province of highly trained technical specialists. Information, reports and guidelines now abound; senior staff need training to know how to select and apply this information to their benefit. Junior staff need practical training in hands-on skills, supported by self-paced learning materials.

The Digital Preservation Coalition has responded to the recognised need for training by organising one-day training workshops for its members. These workshops have been well received but have also served to reinforce the need for an intensive training programme which will provide the skills, tools, and confidence to transfer this learning directly to participants' own institutional settings. To ensure success, this training programme will require intensive planning and preparation and be accompanied by carefully designed course materials which will provide support well beyond the training programme itself.

The Cornell Training Workshops and Online tutorial, developed with National Endowment for the Humanities (NEH)

funding, offered a model for the kind of programme we had envisaged. Excellent links have already been formed with the Cornell team and we would propose building on this still further in developing a core set of training modules, applicable to any setting, while also tailoring requirements to specific UK settings. Cornell have applied for further NEH funding and are keen to develop a more modular approach to the training material in collaboration with the DPC. Appendix B contains a key extract from the application for funding prepared by Cornell which they have shared with us. This seems to us to provide the most productive aspects of international collaboration, benefiting from each others expertise and experience and enabling sharing of creative ideas for delivering content, while still retaining the ability to develop aspects of the programme which will be specific to UK requirements.

JISC have funded a report, commissioned by the DPC, to scope the development of an intensive digital preservation training programme, based on the Cornell model. This scoping report will provide an excellent foundation on which to base development of the programme

Implicit in the above is that the project principals - Kevin Ashley at ULCC, Maggie Jones at the DPC, and Anne Kenny and Nancy McGovern at Cornell - had a good working relationship, a strong commitment to the project, and enjoyed developing and delivering training.

## 3 Aims and Objectives

Our aims were to take the starting points of the existing Cornell course, the online handbook and the DPC's previous training materials and build on them to:

- Develop UK-specific versions of some content
- Adjust existing content and develop new content to meet the needs identified in the Cornwell report
- Update the online handbook and add new material
- Turn the course from a single one-week package into something more modular
- Deliver the course in a pilot (with independent follow-up) and further paid-for events
- Build an ongoing relationship with Cornell for future development

We believe all of these aims were met.

## 4 Methodology and implementation

### 4.1 Development

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The approach we took, once the targets for new development had been identified collectively, was to allocate the development of individual modules to individuals or to small teams of no more than two. Overall development was coordinated, and progress monitored, by the use of the project wiki, by occasional telephone conference calls, and by infrequent face-to-face meetings. These project-wide mechanisms allowed for effective peer review of the material which was developed.

Two individuals from the UK were sent to Cornell to experience the course first-hand, and to help in building relationships between the US and UK teams.

Development of the modules and online materials was undertaken by a mixture of project staff at ULCC and the DPC, and external developers (some of whom were also involved in course delivery.)

We divided up development in this way for a number of reasons. Material is generally quicker to develop the smaller the

number of people involved, and this is much truer when those working on the project are widely geographically dispersed. The material tends to be stronger, having a clearer sense of voice. This is particularly important when we're using material in a week-long course. Over-editing and over-review by committee tends to produce blander outputs with a common voice. It's tiring to teach, and tiring to learn, with materials of this type.

## 4.2 Evaluation

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For evaluation, we utilised three mechanisms.

We had decided at the outset to use some form of independent evaluation of the pilot, and sub-contracted this to Gill Joy of ESYS. She conducted her work through telephone interviews. We indicated a number of questions to which we wanted answers, but left her free to explore additional areas - we wanted to make sure we were had the chance to find out about concerns which we might not have anticipated.

We also gave each participant an evaluation sheet which allowed them to rate each course component on a 5-point scale, offer narrative comments on each component, and offer general comments on the whole experience. For the pilot, we failed to include specific questions about the venue and accommodation (although we received many comments - mainly positive - about both.) This was corrected for later events. We encouraged participants to fill in these sheets as the course progressed, at least once per day. We were surprised and very pleased that people took this to heart - we received extensive, detailed and constructive feedback from almost every participant, for which we are very grateful.

Finally, we gathered all the tutors together at the end of each day to discuss progress, report on our monitoring of each other, and decide on any minor changes that might be necessary as the course progressed.

## 4.3 Group exercises

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The course includes a variety of exercises, one of which lasts all week and is designed to be completed by groups of up to 6, and some of which are 5-minute exercises undertaken individually. Other points between these extremes are covered. We consciously attempt to construct different groups of different sizes for different exercises. Some are randomly chosen ; some try to mix together people with similar backgrounds; some deliberately put together people with different professional skills.

Each of these techniques allows different goals to be accomplished by the exercises. People can learn to work across professional boundaries in the mixed groups, and can learn to cooperate with their peers in the combined groups. The mixing also ensures that occasional difficulties which arise due to personality clashes don't affect someone's work for the entire week.

## 5 Outputs, Results and outcomes

Our outputs are few, but we plan that they will continue to increase. The most important is a larger pool of trained professionals with new skills, and new confidence, in dealing with digital preservation issues. We have also created a larger pool of people with experience in delivering training in this area and have gained a greater insight into training needs in the UK in this area. We intend to produce a report on this area through the DPC during 2007.

We also have a redeveloped online handbook on the DPC web site, an evaluation report on the pilot course, and a pool of training material which can be made available to others subject to licences.

Our work is of benefit not only to the HE/FE community, but also to the wider research and information community of

which we are a part. The course is an intense experience for most of its participants, trainers as well as students. In the UK, as at Cornell, this means that we not only produce a set of trained individuals, but groups of professionals who have developed links that will last some years into the future. We are looking to develop alumni workshops to respond to demands from students for events like this.

## 6 Conclusions

The main conclusion we can draw is that the training needs identified before the 4/04 call was issued were real, and continue to exist. However, more market knowledge is required to know how best to price and deliver such training to be able to continue it on a long-term basis. Despite being good value, it can be difficult to afford in its present form. Furthermore, it is clear that, at present, course fees can defray the costs of delivery but not the costs of ongoing development of course materials.

## 7 Implications

We have shown the benefit of linking up with established digital preservation initiatives elsewhere, and seeking to build on them rather than reproduce them. We achieved a great deal because we had an excellent starting point with Cornell's material, and they proved to be helpful, knowledgeable and generous colleagues. They plan to establish similar links in Australia and we look forward to possible benefits which might accrue.

There is great potential to develop the material, and to produce shorter, more focussed versions, either for specific institutions or for specific requirements, such as institutional repository managers.

## 8 Recommendations (optional)

Our main recommendation is to attend the course, and to let us know what you want from it!

## 9 References

Online Handbook: <http://www.dpconline.org/graphics/handbook/>

Cornell course: <http://www.library.cornell.edu/iris/dpworkshop/>

Cornwell training needs analysis: [http://www.jisc.ac.uk/uploaded\\_documents/finalReport.pdf](http://www.jisc.ac.uk/uploaded_documents/finalReport.pdf)

ESYS evaluation: <http://www.ulcc.ac.uk/dptp/esys-evaluation.pdf> (in preparation)

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