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Abstract

This document assesses the activities carried out during Year 4 of the Planets DT6 Training Work Package. It considers progress against planned objectives, analyses feedback from the series of training events delivered and offers recommendations for future training activities based on experiences in the final year of the project.

Keyword list

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

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EXECUTIVE SUMMARY

The Planets DT6 Training Work Package works to provide a link between the developments of the project and its potential end users. During the fourth and final year of the project the Work Package has focused on delivering a series of outreach and training events to teach target audiences about the Planets approach, alongside the development of online training materials to ensure the Work Package's outputs are available beyond the end of the project.

Section one provides an introduction to the Work Package's activities in Year 4 and outlines the purpose of the document.

Section two provides an overview of the Work Package and its primary objectives.

Section three describes the achievements of the Work Package in Year 4, identifying the tasks assigned and discussing the progress of each.

Section four analyses the series of outreach and training events delivered in greater detail, considering feedback results from across the series in order to evaluate its success.

Finally, section five considers the qualitative feedback from the series and uses the information to provide a list of recommendations for future training events.

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1. Introduction

The DT6 Training Work Package aims to deliver a training programme that provides a link between the results of the project and its intended adopters. In its first year, the Work Package focused on outlining its vision and planning the training programme. This was followed in Years 2 and 3 with a series of joint events as part of the wepreserve initiative, which co-ordinated activities between Planets and the FP6 DPE and CASPAR projects that ended in 2009. The evaluations of these events are contained in the DT6-D2 and D3 end of year deliverables.

In year 4, development and integration of Planets tools and services has made it possible to design and deliver a series of events dedicated to teaching delegates about what Planets can offer. DT6 joined with the DT10 Outreach Work Package to develop the 'Digital Preservation – the Planets Way' outreach and training events. This provided the opportunity to ensure events were fully attended, streamline effort and put resources into ensuring a highly refined series of events. The feedback from the series is contained and analysed in sections 4 and 5 of this document.

Whilst there was a focus on face-to-face training, the Work Package has also been keen to ensure it offered support to delegates through online materials and that it developed resources which could be used by a wider audience beyond the life of the project itself, offering a legacy to the Work Package activities. It has therefore worked to develop a number of resources including technical guides, narrated presentations and reading lists. Some of these were made available to attendees of the courses and a dedicated online training materials webpage was launched in m47.

This document discusses and evaluates the activities of the Training Work Package in Year 4. It assesses the achievements of the Work Package against its planned objectives, analyses the feedback across the training events and finally offers recommendations for the further development of Planets training activities in the follow-on Open Planets Foundation.

An end-of-project evaluation of the Work Package will be provided in DT6-D7 and will summarise the results of a survey with attendees of outreach and training events into the longer-term impact of the training programme. It will also provide recommendations and useful information for the follow-on OPF.

2. Objectives for the Training Work Package

The overall objectives of the Work Package are to:

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

The aim of the Year 4 events has been to deliver a series of five three-day outreach and training events, supported by the online training materials, to potential adopters in target institutions. The events have aimed to introduce Planets tools and services and provide initial hands-on experience, and to make these accessible across Europe. Post-event evaluation has supported continual adjustments to events in the light of feedback.

3. Achievements of Training Work Package in Year 4

3.1 Overview

The following table outlines the specific Work Package objectives for Year 4 (as described in the DoW) and the progress made. This is detailed in the sections below.

Objective	Task No.	Progress/achievements
Manage Work Package effectively including planning, co-ordination of activities and partners, administration of budget and timely delivery of tasks, milestones and reports.	DT6-T1	<ul style="list-style-type: none"> - Timely production of all deliverables and reports - Timely delivery of all tasks including training events - Effective co-ordination of partners and collaboration with DT10
Update the DT6-D1 Training Plan incorporating feedback from previous events and create a revised Training Plan for Year 4 (DT6-D4).	DT6-T5	<ul style="list-style-type: none"> - DT6-D4: Revised Training Plan (completed m39)
Deliver a series of five training events targeted at national libraries, archives and other large institutions in Europe and provide overall coordination of the work of Local Hosts with effort from DT10.	DT6-T6: a: Copenhagen (m37) b: Sofia (m40) c: Bern (m42) d: London (m44) e: Rome (m47)	<ul style="list-style-type: none"> - Copenhagen event (m37) - Sofia event (m40) - Bern event (m42) - London event (m45) - Rome event (m47)
Develop online training materials to offer support for face-to-face courses and more dedicated online training tools.	DT6-T7	<ul style="list-style-type: none"> - Launch of online training webpages (m47)
Evaluate and report on the outcomes of individual events to inform the design of subsequent events and produce an end-of-project assessment of the impact of the training programme	DT6-T8: a: end of event evaluation reports b: DT6-D5 Year 4 evaluation report (m47) and D6 mid-year report. c: DT6-D7 Impact assessment of training programme (m48)	<ul style="list-style-type: none"> - Evaluation reports for each delivered event - DT6-D5 Year 4 evaluation report (this document) - DT6-D7 Impact assessment (in draft: due for submission m48)

Table 1: DT6 Year 4 objectives and progress

3.2 Progress and achievements

3.2.1 DT6-T5: Revised Training Plan

Following feedback from speakers and attendees at early events, a decision was taken at the start of year 4 to combine outreach and training events to optimise speaker and preparation time and attendance at events. A joint DT6/DT10 workshop was held in London in February 2009. The Planets Training Plan (DT6-D1) was reviewed and revised in the DT6-D4 Revised Training Plan. This built on the ideas in the DT6 and DT10-D3 deliverables. The plan contained a set of project

management documents setting out the overall structure and arrangements for coordinating events. It also contained an updated set of event templates based on the original organisers' pack and templates developed during the first training event in Copenhagen. These helped to ensure clarity over roles and responsibilities and consistency across five events. The completed document has served as a complete reference to the training activities for Year 4 of the project.

3.2.2 DT6-T6: Event delivery and evaluation (see Section 4)

The DT6 training team has worked with the DT10 Outreach Work Package to manage the content and delivery of the event series and its financial and general administration. Local Hosts, with effort in DT10, have been responsible for coordinating one event locally and drafting the post-event evaluation report (see T8). Three of five events have been fully attended on all days and two have been fully attended / booked for days two and three.

3.2.3 DT6-T7: Online training

The online training materials have sought to provide training materials which support attendees of the training events, but also offer the opportunity for a wider audience, unable to attend events, to learn more about the tools and services available. In addition, online training will ensure the teaching materials developed by DT6 will extend training beyond the life of the project itself. Online materials will be made available in m47 and consist of:

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

3.2.4 DT6-T8: Evaluation of programme

Post-event evaluation reports for each event have assessed the feedback from delegates and provided recommendations. They have been reviewed with speakers during the start-up call for the subsequent event and used to refine the programme. The reports can be viewed in appendices A-E. Confidential feedback on each session was also collated and reported to the individual speakers by the DT6 Work Package Lead. As a result of ongoing evaluation, there have been consistent improvements to satisfaction ratings across the series.

This document brings together the evaluations of each event to assess the success of the overall Year 4 programme, following the format of the previous D2 and D3 assessments of Year 2 and Year 3 of the Work Package respectively.

4. Events

4.1 Introduction

4.1.1 Overview

'Digital Preservation – the Planets Way' was delivered to almost 250 people in five European locations between June 2009 and April 2010. The events were aimed at potential adopters of Planets. These included: those responsible for digital preservation or the budget for it in Planets consortium partners, cultural and heritage institutions and large data holding institutions; CEOs and

product managers in organisations that provide digital preservation solutions (digital library systems, repository systems, preservation tools, consultancy and systems integration and format or content tools), as well as researchers in the field.

The series was designed so that with each event Planets targeted a different area of Europe, thus ensuring accessibility for countries throughout the region and the opportunity to provide a local focus to each event. A table showing the target regions and countries for each event can be seen on pages 20-21 of the DT6-D4 Revised Training Plan deliverable.

Day 1 formed the outreach aspect of the event, providing background to the Planets project, an overview of the issues and challenges, an introduction to preservation activities as part of a general risk management approach and the Planets framework, tools and services.

Days 2 and 3 delivered dedicated practical training sessions which demonstrated how Planets can help to create integrated workflows to support digital preservation. Participants were provided with sample content to experience the process of planning, characterising digital content, creating an action plan, selecting preservation actions, testing, executing and validating a plan.

At each event case studies from the local area demonstrated the challenges organisations in the region face with preserving digital content and how these are being tackled.

4.1.2 Success criteria and evaluation

For each course an event plan was produced (for sample see Appendix C1 of DT6-D4), which outlined the general and specific nature and objectives for that course. While events were refined and improved on the basis of feedback and each had local variations (eg Sofia secured a Central European Initiative sponsorship for 15 bursary candidates and London was delivered with the Digital Preservation Coalition), the overall objectives, format and content remained constant to allow for comparison. The objectives were the basis for the subsequent evaluation plan (for sample see Appendix F1 of DT6-D4) and feedback form which aimed to measure how well the event performed against the goals to:

- Provide an **understanding of issues** with digital preservation
- **Introduce Planets'** approach, tools and services
- Provide practical examples of how two **organisations' approaches** to the issues
- Provide an opportunity to **engage in discussions**, share experience and best practice
- Equip people with **practical skills**
- Enable people to **see Planets as a potential solution** in their organisation
- Provide an opportunity to **ask questions and input** feedback

It was intended delegates should leave with the event having:

- **Met expectations**
- Encouraged attendees to **consider using Planets** and
- Pre-disposed to **attend similar events** in future

Each event was evaluated against the following criteria:

- 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 event criteria in the feedback form which is based on the objectives of the event (see above)
- 70 per cent of attendees rate each of the components of event design (organisational criteria) as good or better:
 - Speakers

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

The success criteria were measured through delegates' responses to a standard feedback form, which was issued at the end of each event. This form asked delegates to score various aspects of the event (1 being poor and 5 being excellent), as well as provide comments on what they liked best about the event and what could have been done better. The evaluation also allowed delegates to feedback on each of the sessions, the results of which were communicated confidentially to each individual speaker. A sample of the feedback form can be seen in Appendix G.

The rest of this section analyses the results from the feedback forms across the series and presents a summary of conclusions and recommendations. Individual event evaluations can be seen in Appendices A-E.

4.2 Demographics

The following section discusses the audience composition of those who attended the Year 4 events. Due to the unprecedented shutdown of European air space because of volcanic ash before and during the Rome event, a significant proportion of registered delegates were unable to attend, leading to a smaller and almost exclusively local audience. In order to give a fairer representation of the audience which should have attended the Rome event, information used in this section is based on all delegates who registered, rather than just attended. More details of demographics for actual attendees can be seen in the Rome evaluation report in Appendix E.

4.2.1 Attendance

Each event in the series was well attended, with three out of five reaching target for all day attendees and two full capacity for days two and three. The London event offered 40 places to members of the Digital Preservation Coalition (DPC) on day one (maximum capacity 80), which led to a high level of attendance on that day. The Sofia event had no day one only attendees, but did have good attendance across the three days. The overall lower number of delegates for this event was however anticipated, based on the level of digital preservation activity in the area and experience from other training events in Eastern Europe (most notably the Vilnius DPE/Planets/nestor training event in 2007). Similar issues occurred with the Rome event, again possibly because of the low level of activity in Southern Europe. The original numbers expected to attend demonstrate that had the volcanic ash incident not occurred attendance for Days 1-3 would have been in line with previous events. The overall averages across the events still show good attendance for the series as a whole.

		COPENHAGEN	SOFIA	BERN	LONDON	ROME		Overall average
						Registered	Attended	
Day 1	Target	50	50	50	50	50	50	50
	Actual	57	--	57	72	36	11	55
	Variation	7	--	7	22	-14	-39	
Days 1-3	Target	30	30	30	30	30		30
	Actual	35	27	35	34	30	8	32
	Variation	5	-3	5	4	0	-22	

Table 3: Overall event attendance

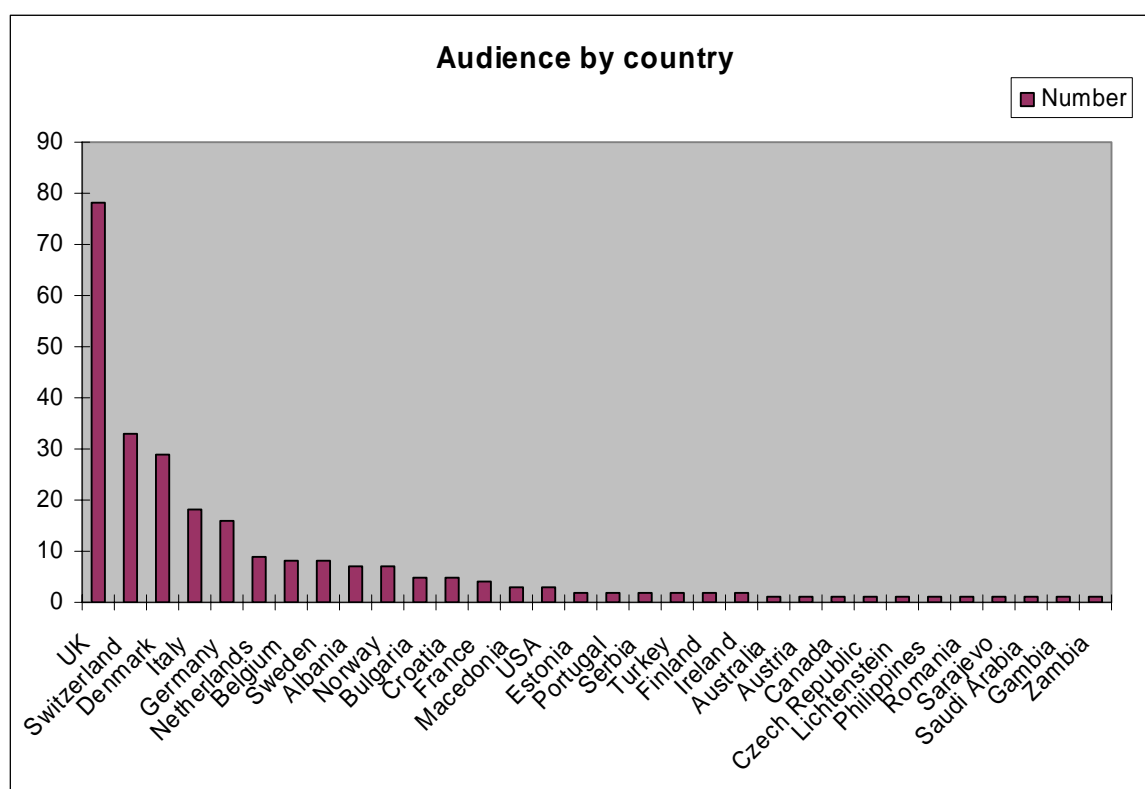
4.2.2 Audience by geographical region and country

The series aimed to ensure that the percentage of attendees from target regions met or exceeded seventy percent. As can be seen from the table below, all events except Rome met their target successfully, whilst still training a good percentage of delegates from outside the region in focus. As previously mentioned there was difficulty in attracting delegates from outside the target countries for the Rome event, perhaps because along with lower levels of digital preservation activity the project has no Consortium partners and fewer close contacts in the region. There was also such a large amount of interest in the sold-out London event that delegates from its target countries who were unable to secure a place for London instead registered for Rome.

	COPENHAGEN	SOFIA	BERN	LONDON	ROME	Overall average
Target %	70	70	70	70	70	70
Actual %	75	74	75	88	43	71
Variation %	5	4	5	18	-27	1

Table 4: Respondents from targeted countries

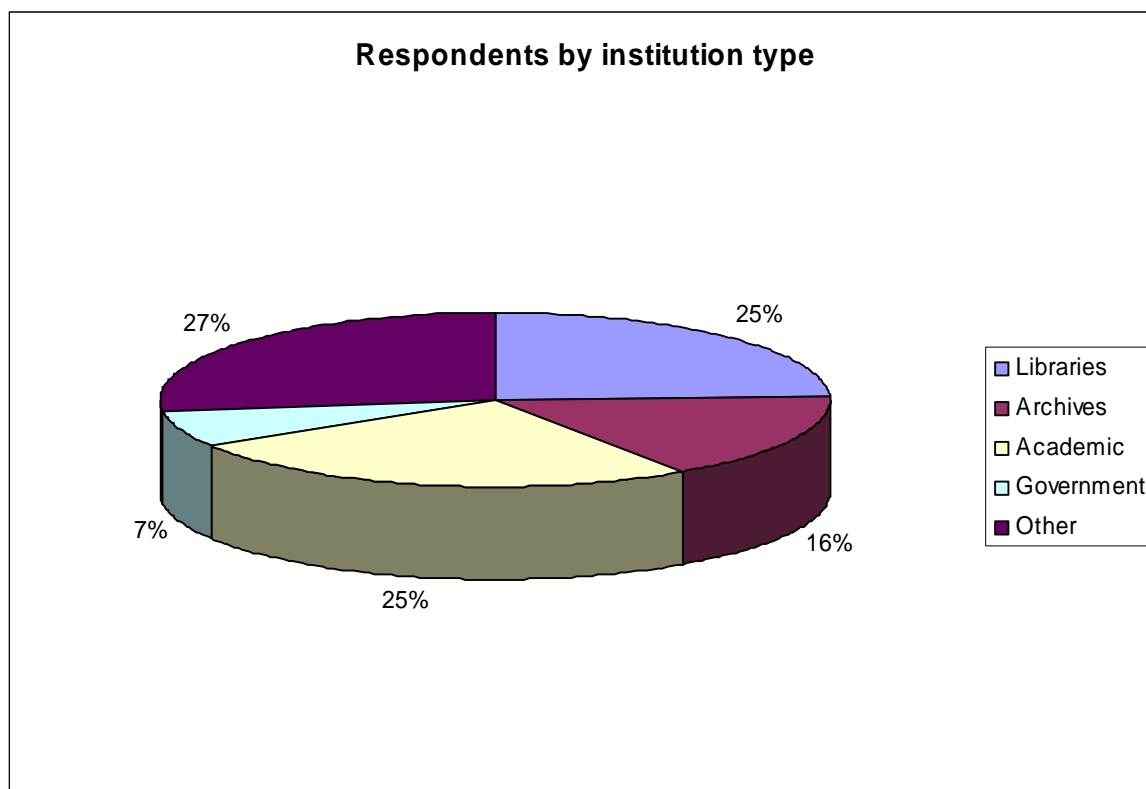
A look at attendance by country across the five events shows that the series successfully attracted delegates from a large number of countries in Europe, as well as a number from other parts of the world including the USA, Australia, Saudi Arabia and the Philippines.



The countries with the largest number of delegates were the UK, Switzerland, Denmark and Italy, where four of the events took place. Germany was also well represented, perhaps demonstrating a good level of interest in digital preservation activities in that country, as well as near proximity to many of the events. Countries which were under represented included those of Southern and South Eastern Europe, despite the events in Rome and Sofia, and also some Western European countries such as France and Spain. Possible explanations for these countries' comparatively lower attendance may be less interest or involvement in digital preservation, or a reluctance to attend events delivered in English.

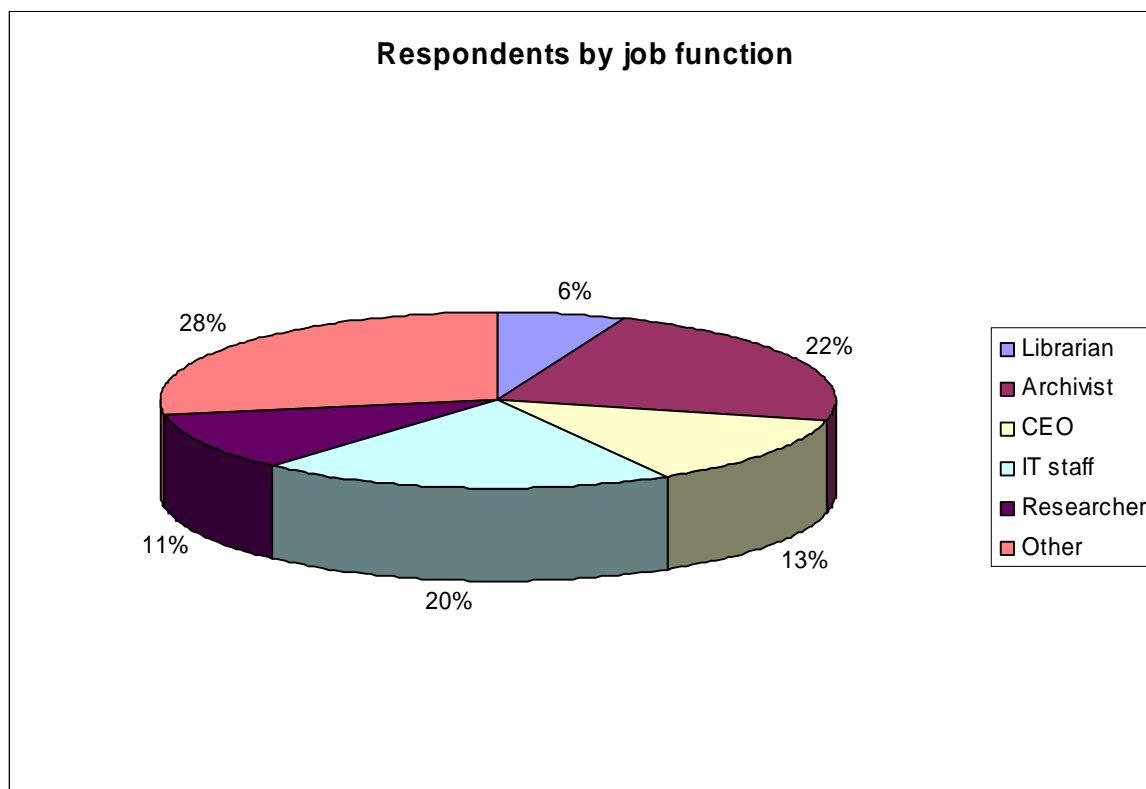
4.2.3 Audience by institutional type and occupation

The events aimed to attract seventy percent of delegates from the target sectors of libraries, archives and other large content-holding institutions such as government. The following chart demonstrates this target was met with 73% of delegates coming from target sectors across the series.



As anticipated a significant proportion of delegates were from libraries and archives, but another large sector was academia, including institutions carrying out research into digital preservation. This was also reflected in the types of jobs delegates work in.

The series was also designed to attract attendees with the job roles of CEOs/senior managers, IT staff and digital preservation practitioners in the form of librarians and archivists. Again the target was for 70% of the audience to come from these roles. The below chart shows that across the series 61% of feedback respondents represented the target occupations, falling a little below target. Although a notable proportion of attendees came from libraries, the number of actual librarians was lower than anticipated, with the majority of staff from these institutions falling instead into either IT or CEO job categories. Researchers, who were outside the target audience, represented 11% of delegates, perhaps suggesting interest in the topic is still at a research level in many countries and that further work in the future may be needed to attract delegates at practitioner level.



4.3 Event criteria

Delegates at each training event were asked to provide scores reflecting the extent to which the course had met its objectives and their needs and expectations. The series received good feedback overall, with nearly all targets being met. The scores from delegates attending all three days were highly positive, with the overall average who rated the event as good or excellent for almost every criterion exceeding its target across the series. The courses' success in providing a good introduction to Planets and meeting expectations were particularly highly rated and a significant majority would consider using Planets and attending similar events in the future. The areas which received the lowest average scores were enabling delegates to understand approaches and the gaining of practical skills, but even these were still close to the target, with understanding approaches the only criteria to fall below 70%.

		Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Attend similar events
Target %		70	70	70	70	70	70	70	70	70	70
Copenhagen	Actual	89	89	68	71	64	81	88	88	69	64
	Variation	19	19	-2	1	-6	11	18	18	-1	-6
Sofia	Actual	90	95	85	90	70	90	85	100	100	95
	Variation	20	25	15	20	0	20	15	30	30	25
Bern	Actual	74	87	71	77	66	83	79	94	93	97
	Variation	4	17	1	7	-4	13	9	24	23	27
London	Actual	84	100	58	95	84	82	89	84	86	89
	Variation	14	30	-12	25	14	12	19	14	16	19
Rome	Actual	100	88	56	67	75	100	100	100	100	100
	Variation	30	18	-14	-3	5	30	30	30	30	30
Overall average		87	92	68	80	72	87	88	93	90	89

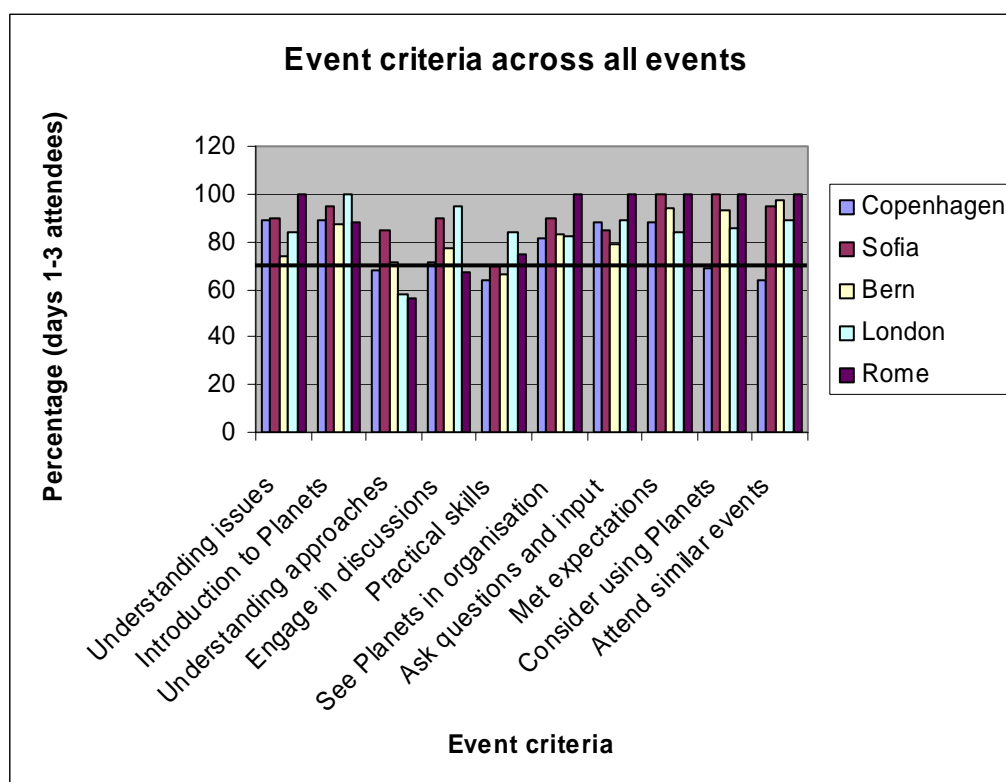
Table 7: Event criteria scores across series for all days delegates

Day one only delegates scored the event a little less highly, though results remained good overall. Delegates still rated the event highly in enabling them to understand issues, providing an introduction to Planets, and meeting their expectations. The areas where scores were lower were again understanding approaches, but also enabling delegates to engage in discussion. The lower score for understanding approaches suggests day one could have perhaps presented the overview more simply and assumed less prior knowledge of the audience at some events. The latter criticism can mostly be attributed to the structure of day one, which due to its introductory approach did focus mainly on a lecture format with few practical activities where participants could engage more freely. After feedback from the Copenhagen event organisers and speakers analysed day one and made a number of changes to offer more opportunities for the audience to engage with both each other and the lecturers. Organisers and speakers also later reviewed and revised day one slides for the London event to de-duplicate material and ensure a smoother flow and continuity of messages between the presentations. The subsequent improvement in feedback demonstrates the success of these changes. Delegates clearly left the later events feeling much more positive about their experience and keen to consider using Planets and attending similar events.

		Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Met expectations	Consider using Planets	Attend similar events
Target %		70	70	70	70	70	70	70
Copenhagen	Actual	100	89	56	11	78	50	33
	Variation	30	19	-14	-59	8	-20	-37
Bern	Actual	90	95	85	90	90	90	100
	Variation	20	25	15	20	10	10	20
London	Actual	83	87	55	64	83	75	67
	Variation	13	17	-15	-6	13	5	-3
Overall average		91	90	65	55	84	72	67

Table 8: Event criteria scores across series for day one only delegates¹

The following chart offers a comparison of feedback results for event criteria across the series. It is clear that in the majority of cases events have either remained relatively consistent or improved as the series has progressed.



¹ The Rome event only received three feedback responses from Day one only delegates, one of which was only partially completed. As such a small dataset produces percentages which are misrepresentative of responses, the Rome Day one only figures for event and organisational criteria have been omitted from this report.

4.4 Organisational criteria

Delegates were also asked to score each event on its general structure and organisation. The overall feedback was again highly positive and demonstrated the detailed groundwork which had been put into each event by organisers and speakers. Days 1-3 delegates provided scores of good or excellent for nearly all aspects of the organisational criteria. The speakers received consistently high scores, reflecting the knowledge, skills and dedication of the Planets team. The content of sessions was also praised, as was the general organisation and administration. The two areas with the lowest scores were the content of exercises and the pre-reading, but even these exceeded target overall. The training team constantly assessed the content of the exercises and worked hard to make improvements, including organising train-the-trainer sessions before each event to ensure a sufficient number of lecturers were able to assist delegates on each practical activity. This did help in improving the structure of the exercises and ensuring delegates got the most out of the group sessions. The low score for Bern was also largely attributed to technical difficulties during one of the exercises. Rome's excellent score was attributed to the fact that the groups were smaller, which allowed delegates more hands on opportunities and gave them a much more rewarding experience. Consistent feedback across the events indicated an appetite for more practical sessions and an opportunity to work with the tools individually rather than as groups. The pre-reading list was restructured after Copenhagen but still missed its target rating in some events.

		Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target %		70	70	70	70	70	70	70	70	70
Copenhagen	Actual	93	93	61	71	69	93	93	96	86
	Variation	23	23	-9	1	-1	23	23	26	16
Sofia	Actual	100	100	80	85	80	90	100	95	90
	Variation	30	30	20	15	10	20	30	25	20
Bern	Actual	90	87	55	77	70	84	84	90	84
	Variation	20	17	-15	7	0	14	14	20	14
London	Actual	95	92	76	76	67	86	94	100	97
	Variation	25	22	6	8	-3	16	24	30	27
Rome	Actual	100	100	100	88	88	75	88	88	88
	Variation	30	30	30	18	18	5	18	18	18
Overall average		96	94	74	79	75	86	92	94	89

Table 9: Organisational criteria scores across series for all days delegates

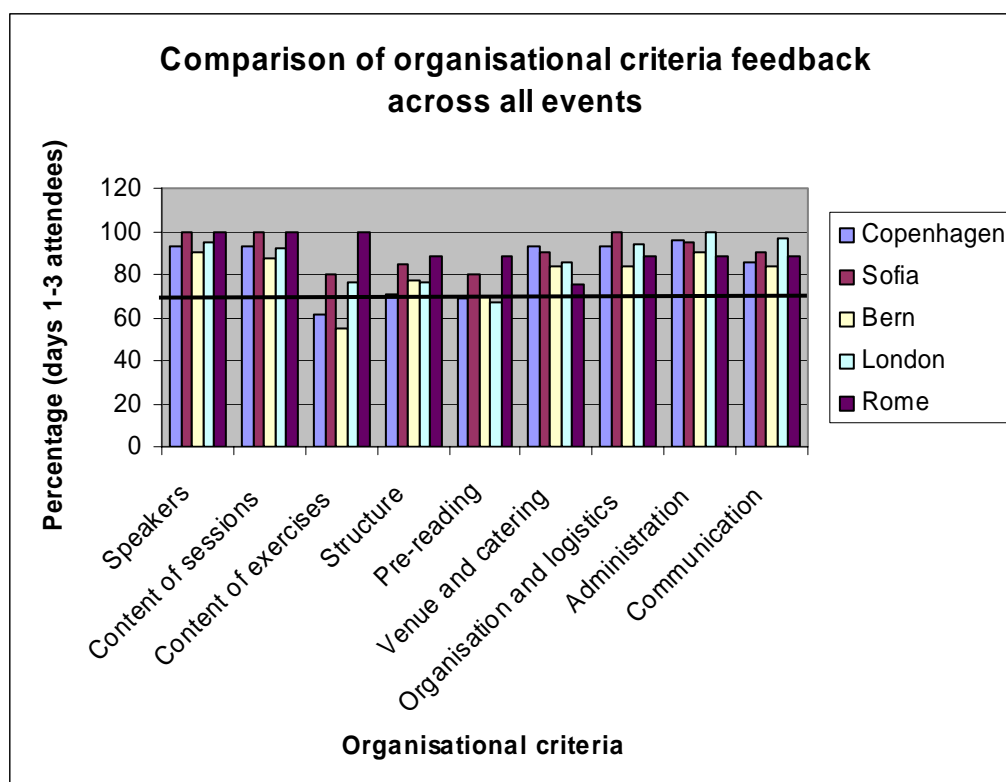
Feedback from day one delegates was overall less positive than from delegates attending all days, but most scores nevertheless well exceeded targets. Speakers, the content of sessions and general organisation, administration and communication were all highly scored. The two areas

which fell below target on average were the venue and catering and pre-reading. The low venue and catering scores for Copenhagen and Bern relate to specific issues on day one of the events, including room temperature and seating arrangements. The good scores from delegates attending all three days demonstrate that the problems were rectified for the remainder of those events, or perhaps that the practical approach to days two and three and the different seating arrangements made the issues noted on day one less apparent. The pre-reading scores from day one-only attendees are noticeably lower than from those attending for all three days, suggesting the list was perhaps too long or detailed for delegates attending a one day event and that expectations of how much time delegates would dedicate to pre-course preparation were perhaps overestimated.

		Speakers	Content of sessions	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target %		70	70	70	70	70	70	70	70
Copenhagen	Actual	100	63	50	38	50	75	88	100
	Variation	30	-7	-20	-32	-20	5	18	30
Bern	Actual	89	90	100	60	60	100	90	80
	Variation	18	20	30	-10	-10	30	20	10
London	Actual	81	86	85	79	89	85	89	93
	Variation	11	16	15	9	19	15	19	23
Overall average		90	80	78	59	66	87	89	91

Table 10: Organisational criteria scores across series for day one only delegates

The following chart shows the consistently high scores for the organisational criteria of the event from all days delegates across the series.



5. Conclusions from feedback and recommendations

5.1 Results of qualitative feedback

In addition to scoring various criteria for the training events, delegates were invited to provide general comments, encompassing what they liked best about the event, what they would like to see in future events and what they thought could have been done better. A comparison of feedback across the series shows that qualitative feedback was fairly consistent, with similar points being raised at each event. The responses provide an overall view of what delegates expect from these types of events, and useful information on how future events could be improved.

Likes – Delegates particularly enjoyed the range of topics discussed at the events, as well as the good introduction to digital preservation and Planets which was provided. Another aspect which was clearly popular was the hands on approach of the event and the practical exercises. One delegate summed up a general sentiment shared by many, commenting that they liked “the fact there was a practical aspect. There has been a lot of talking, now it’s time for action”. The speakers received high praise across the events for their knowledge and approach to the topics discussed, one delegate commenting that “the speakers were very enthusiastic and a pleasure to listen to”. The opportunity to share ideas and meet others with similar questions also proved useful to many attendees. The social aspects of the event such as the delegate dinner on day one gave people the opportunity to get to know each other informally and also for managers and ‘hands-on’ staff to exchange views on the key issues discussed.

One noticeable improvement as the series progressed was the number of positive comments about day one, which reflects the success of the improvements made after Copenhagen. Whilst few Copenhagen attendees provided specific positive feedback on the day, delegates from later events offered much praise and called the day “very interesting”, “stimulating” and “excellent”.

Like to see – The Work Package received a variety of constructive comments on what delegates would have liked to have seen, or would like to see in future training events. Several delegates commented that they would like to see more clearly how the Planets tools fit together, rather than focusing on each tool individually. There were also requests from each event for more examples or “more case studies of organisations actually using Planets tools”, particularly in providing a perspective of how Planets could work for smaller institutions. One of the most popular requests was for more practical and hands-on exercises, with a particular emphasis on the opportunity for delegates to use tools individually rather than in groups.

Do better – Delegates were asked which aspects of the events they felt could have been done better. There were a significant number of comments received on the detail and technical level of the events. A number of delegates felt there was too much focus on introductory issues like the reasons for digital preservation, particularly on day one: “The first day offered too much basic information about digital preservation. It wasn’t necessary”. Some delegates commented that the technical level of the event overall was too low, whilst others (mostly librarians and archivists) felt that some of the sessions were too technical. This conflict of opinion supported other comments which suggested that some areas of the event should distinguish between information needed for librarians, archivists etc, managers and IT professionals or developers: “Great difference in experience among attendees ie no experience, experience, technical experience. For me it could have been more technical. Perhaps, different conferences for different groups or different sessions”.

Again the point about more practical exercises was raised by a substantial number of delegates, with the majority stating they would have preferred to work with the tools individually rather than in groups: “I would have got more out of it if we had been able to have a proper go ourselves in a ‘lab’ type situation with Planets experts on hand to help out”.

Several comments were received in relation to the length of the days, particularly day one, which was deemed to be too long with a lot of information to take on board. One delegate suggested “perhaps more variety and cram less in”, which was the feeling portrayed in a number of responses. It is interesting that a number of delegates attending all three days commented that whilst day one left them feeling somewhat overwhelmed, days two and three provided clarification and left them feeling a lot more confident about what they had learnt.

5.2 Overall conclusions and recommendations

The DT6 activities for Year 4 have been an overall success, with all tasks being completed to a high standard and receiving positive feedback. The event series has proved popular, demonstrating the interest generated in the project and an enthusiasm to learn more about it.

Whilst the organisation, structure, content and delivery of the events has been successful, the feedback suggests a number of ways in which future training events could be further developed to meet the needs and requirements of target audiences. The following is a list of recommendations for any training activities delivered once the Planets project has concluded.

Course content

- **Personalise courses for different types of audiences.** The feedback has highlighted the differences in expectations between groups such as librarians and archivists, IT professionals and developers and CEO’s, as well as their level of technical understanding. The DT6 events have offered a detailed introduction to new and recently finalised services and tools, but as the Planets approach is now rolled out more widely, courses specifically aimed at different target groups or even particular job roles would deliver a more focused learning experience. DT6 did not have the time or resources available to fully explore dedicated training for suppliers and vendors, which had originally been hoped at the start of the project. This is another audience group that would benefit from further training activities, which would need to be considerably more technical and in-depth than what the project Work Package could offer.

- **Include more case studies demonstrating Planets in action.** Delegates of DT6 events have indicated that they would like to see more examples of Planets being used in organisations so that they can place the tools in context and also see how the approach can apply in their sector or type of organisation. DT6 events have been unable to offer these at this stage of the project. However, as take-up increases over the coming months and years more real life examples of Planets being successfully applied in a variety of organisations will become available. Their inclusion will benefit training activities and could be a successful way of promoting Planets' advantages and demonstrating its capabilities.
- **Localise courses for different areas of Europe.** The DT6 Work Package anticipated that audience understanding would vary across different parts of Europe and attempted to deliver sessions at a level which the local audience would understand. It is however clear from the attendance levels at some events that certain areas of Europe, particularly Southern and Eastern Europe, may be at a less advanced stage or have less interest or current involvement in digital preservation, with a focus instead on digitisation of information.. Consequently, a different level and approach may be required in order to raise awareness of Planets in these areas and teach them about what the approach can offer to their organisations.

Course structure

- **Place an emphasis on practical sessions.** One of the most common comments in feedback across the series was a desire for more hands-on activities and opportunities to work individually with tools. It may be useful in the future to offer either a longer course (e.g. 'summer school'), or a series of shorter courses, so that attendees can learn about the tools initially but then participate in extended practical sessions in an IT lab environment. At the time when DT6 designed and delivered the Year 4 events such access to the Planets tools was not feasible, but the OPF may be able to offer this level of training in the future.
- **Continue face-to-face training events.** A high proportion of delegates across the series commented that one of the things they liked best about their experience of the Planets training was the opportunity to network with others and share ideas and practice, as well as being able to discuss issues with experts in person. This demonstrates the value of face-to-face events and how they can generate interest in Planets and potentially secure take-up. Events support other outreach activities and help to build a community receptive to Planets ideas and subsequent developments.
- **Strengthen online training facility.** The DT6 online training materials could only practically be produced near the end of the project, when tools and services were being finalised, but the potential of online training for Planets is still substantial. There is now the opportunity to extend these into a more sophisticated suite of materials that can train a larger audience and support wider take-up of Planets. The versatility of online training means that additional sessions or modules could easily be added to enable bespoke training for different user groups or individuals. The outputs of the DT8 Demonstrators Work Package could be used as part of a more sophisticated portal of materials, and the OPF could also consider further use of Web 2.0 technologies to promote the facility to a worldwide audience.

Course organisation and promotion

- **Use the processes and documentation developed.** The DT6 Year 4 events were highly praised for their organisation, and this was in part due to the various templates and documents developed in the original speakers' and organisers' packs and revised during year 3 and for the Copenhagen event in order to effectively design, deliver and evaluate a training event. The organisers of any future Planets events should make use of this documentation and the processes outlined which will ensure successful planning, deployment and analysis of a training programme.

Appendix A. Copenhagen evaluation report



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

Event evaluation

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

Day one was provided an overall introduction to digital preservation and Planets tools. Days two and three provided practical training on digital preservation and Planets technology, tools and services. They included exercises in groups based on real and conceptual examples; demonstrations and facilitated discussion. The event aimed to stimulate delegates' interest in Planets and equip them with information, skills and examples that will help them and their organisations to implement the outputs of the project.

The delegates had the opportunity to participate in a conference dinner on the evening of the first day of the event. Thirty-two delegates and speakers took part.

Forty-three per cent (9) of delegates on day one and 78 per cent (44) of all delegates completed the feedback form. Appendix 1 contains the event Evaluation Plan and Appendix 2 the feedback form.

Success criteria

Day one aimed to give delegates:

- 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 organisation is 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

Days two and three aimed to give delegates:

- 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

Respondents were asked to rank performance against the core objectives, with 1 corresponding to 'poor' and 5 to 'excellent'.

Success criteria were set at:

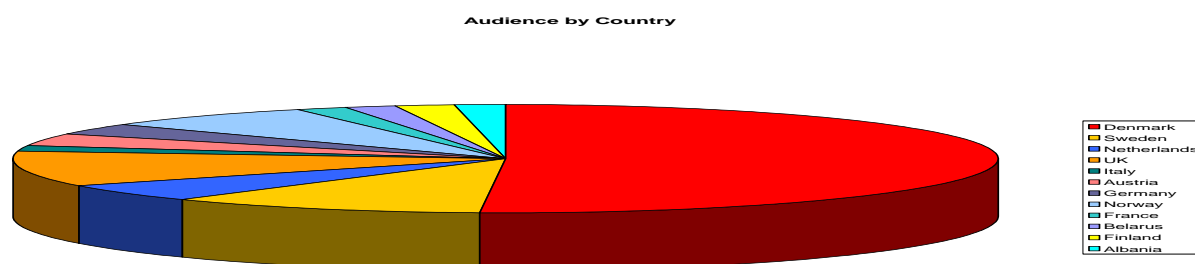
- Attendance by 50 or more delegates representing target user and supplier communities on Day one and 30 or more delegates on Days two and three.
- 70 per cent of attendees rate the event as good or better at achieving objectives set
- 70 per cent of attendees rate components of event design as good or better.

Attendance.

There was a high attendance rate. Fifty-eight delegates registered for day one and 57 delegates attended. Thirty-six delegates registered for all three days and 35 attended. One delegate registered for days two and three only and attended.

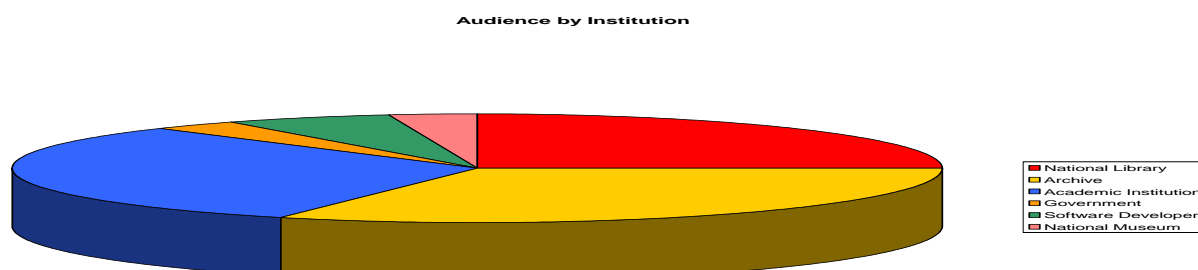
Audience by geographical region

This was the first in a series of five events and had as its geographical focus attendees from countries in Northern Europe. Specific countries targeted were: Denmark, Norway, Sweden, Finland, Iceland, Estonia, Latvia, Lithuania, Poland, Germany, Netherlands and Belgium. Seventy-five per cent of delegates came from targeted countries including 50 per cent from Denmark, 10 per cent from Sweden and eight per cent from Norway. One came from outside Europe (Australia).



Audience composition by institution type

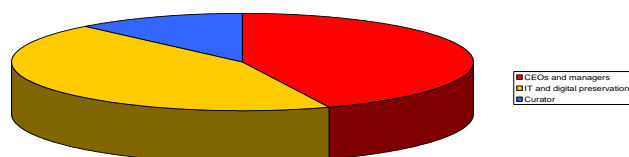
The event was targeted at National Libraries, National Archives and other major content-holders. Twenty-five per cent of all attendees represented national libraries and 32 per cent national archives, 31 per cent of attendees represented academic institutions with a few governmental institutions, vendor and software developers and a national museum.



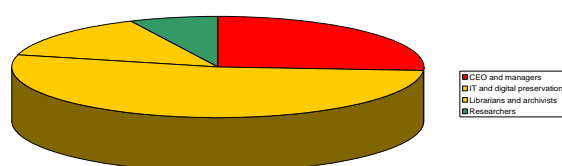
Audience composition by occupation

Day one of the event aimed to attract senior personnel (CEOs, Heads of IT, Curation and Preservation) as well as technical preservation, curation and IT staff. Days 2 and 3 were targeted more specifically at digital preservation staff (e.g. librarians, archivists, digital librarians and archivists, repository managers, software developers, policy managers etc.). Sixty-two per cent of all respondents were IT and digital preservation staff. A further 30 per cent were CEOs and senior managers. The remainder were made up of researchers and a curator.

Audience by Occupation - Day 1



Audience by Occupation - Day 2



Day one only respondents were comprised of CEO and managers (44 per cent), an IT- and digital preservation-specific group (44 per cent) and a single curator. Respondents on all days comprised: an IT- and digital preservation-specific group (including digital librarians and digital archivists) (53 per cent), CEO and managers (26 per cent), libraries and archivists (14 per cent) and researchers (7 per cent).

At-a-glance

The following tables summarise respondents' feedback against each objective. The row labelled 'Actual' indicates the percentage of delegates who rated the event as 'good' and 'excellent'. The 'Variation' row indicates the difference between the actual and target scores. Negative values are shown in red.

All delegates received the same feedback form. Some questions on the form were not applicable to day one only delegates and any responses received were discounted. Attendees were also asked to complete a pre-questionnaire three weeks' before the event. This is contained in Appendix 3. The responses are summarised in Appendix 4. Respondents could also rank individual sessions and speakers. This has been analysed in a separate document which is confidential to those involved in planning and delivering the training.

Event Criteria (all delegates)

	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70
Actual	95	90	62	41	64	81	88	82	60	49
Variation	25	20	8	29	6	11	18	12	10	21

On both day one and all days the event met expectations. Respondents rated the event highly in providing them with an understanding of issues and an introduction to Planets; enabling them to see how Planets could fit into their organisation and providing an opportunity to ask questions and input to the project. Two-thirds would consider using Planets and almost half attend similar events in future. The event was less effective at demonstrating real-life examples of approaches to digital preservation and in equipping delegates with practical skills and involving delegates in discussion.

Organisational Targets (all delegates)

	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	97	78	61	61	54	72	84	92	93
Variation	27	8	9	9	16	2	14	12	23

Speakers scored highly on both days with almost all respondents rating them as good or better. The organisation, administration and communication also scored highly. Delegates were less satisfied with the structure of the programme, content of exercises and pre-reading.

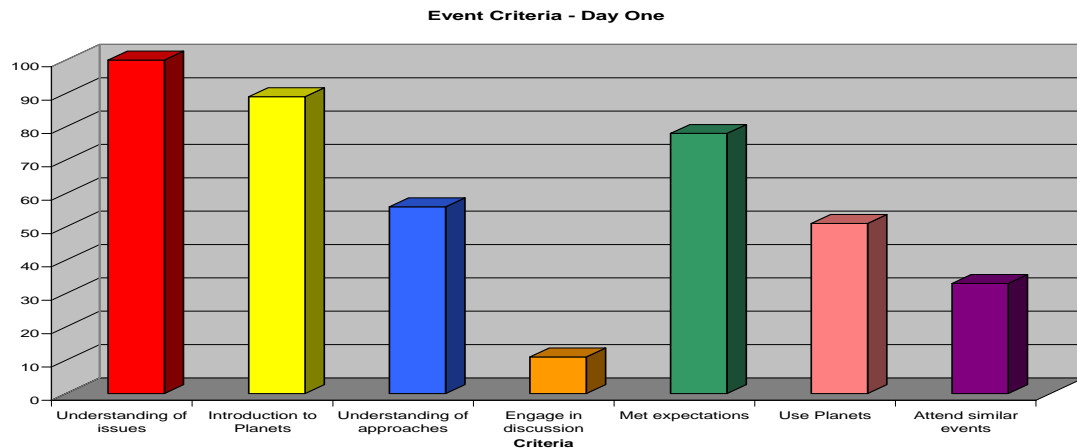
About the event

The first table shows a summary of responses by day one only respondents and the second table shows a summary of responses by respondents who attended all three days.

Event criteria

Day 1 only-respondents

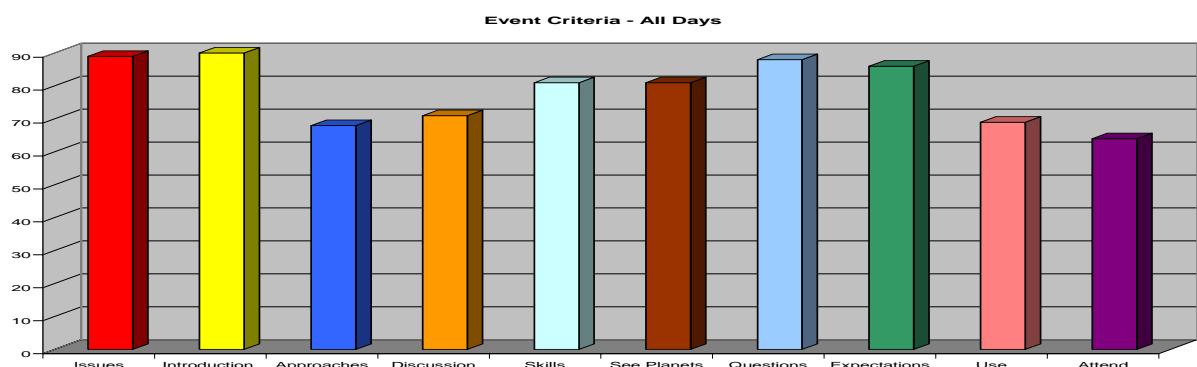
(%)	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70
Actual	100	89	56	11	78	50	33
Variation	30	19	14	59	8	20	37



Day one respondents ranked the event highly for providing an understanding of issues and introduction to Planets and in meeting their expectations. It scored less well in helping delegates to understand approaches to digital preservation or engaging them in discussion. Just two-fifths would consider attending a similar event and one-fifth using Planets.

All days-respondents

	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70
Actual	89	89	68	71	64	81	88	88	69	64
Variation	19	19	2	1	6	11	18	18	1	6

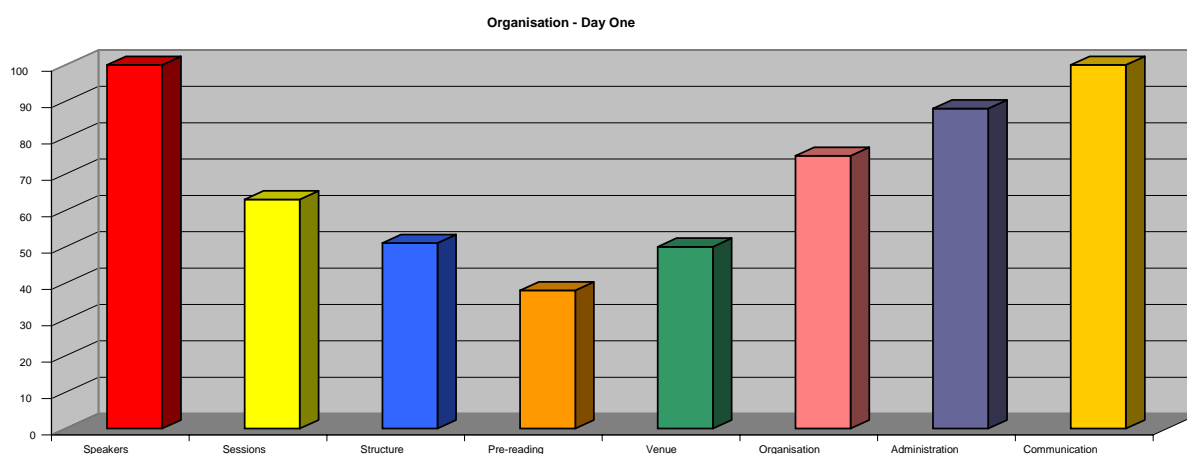


By contrast respondents on all days rated the event around or above target against all criteria. The event was scored least highly for equipping delegates with the practical skills they need to use Planets in their organisation. This needs to be taken into account during the planning and preparation of future events. Almost 70 per cent said they would consider Planets and 64 per cent that they would consider attending similar events. This may indicate that criteria for day one were too ambitious. However, it may also indicate that day one only delegates may benefit from a more practical and interactive introduction to Planets rather than the formal presentational overview.

Organisational targets

Day one respondents

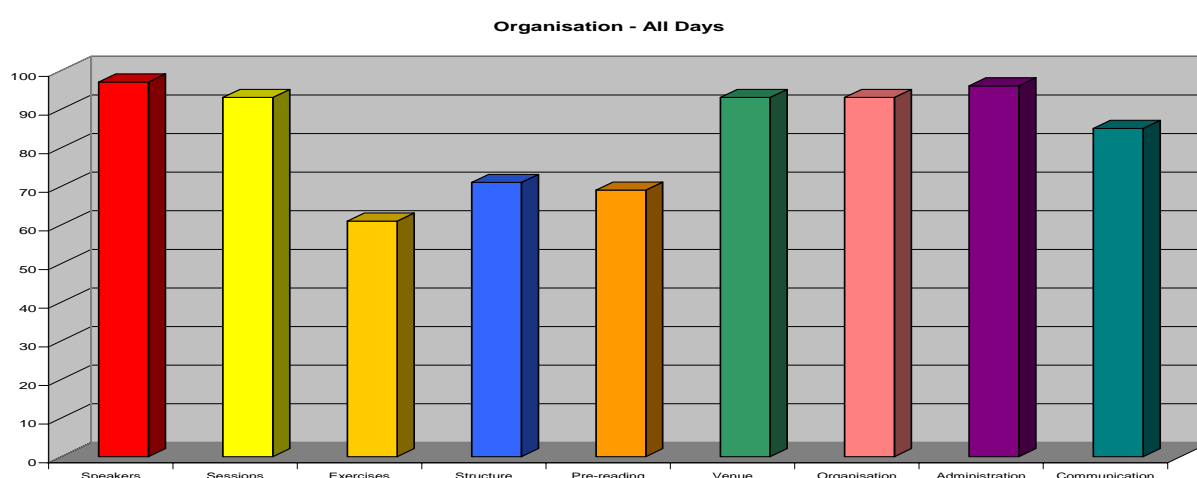
	Speakers	Content of sessions	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70
Actual	100	63	50	38	50	75	88	100
Variation	30	7	20	32	20	5	18	30



Day one respondents rated speakers highly and found the day to be well communicated, administered and organised. However, unlike the all days respondents, they rated pre-reading, the structure of the day, the venue and catering, and content of sessions below target. Feedback indicates respondents were overwhelmed by the amount of suggested pre-reading.

All-days respondents

(%)	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	93	93	61	71	69	93	93	96	86
Variation	23	23	9	1	1	23	23	26	16



By contrast over 60 per cent of all day respondents rated speakers, content of sessions, venue, catering, organisation and administration and other aspects including pre-reading, structure and content of sessions as good or better. Consequently, the overall design of the event appears to have suited all day delegates. Feedback indicates that content of practical exercises including preparation needs some consideration for future events.

Communication and motivation

The majority of the respondents (74 per cent) had heard about the event from a mailing or from personal or professional contacts. Mailings included mailing lists and personal e-mails from Planets partners with recommendation of the event. Some of the mailing lists mentioned in the feedback forms had been targeted directly by Planets. Others had not. This indicates that word was spread far and wide about the event by word of mouth. Twenty-six per cent of the respondents had learned about the event directly from Planets, including e-bulletins and directly from the Planets website.

The primary motivation for people to attend was because of professional interest in digital preservation and interest in Planets' approach to the issues and the relevance of these issues to their day-to-day work.

Speakers

Over ninety per cent of respondents rated speakers as good or better. Evaluation of sessions and speakers is documented separately in the Feedback Summary Speakers which is confidential to speakers and Planets event organisers. Qualitative feedback indicated that the technical level of the speakers and their assumptions about the audience's level of understanding were at times too high. Partly, this reflected the topic under consideration (e.g. characterisation) and partly the fact that this was an audience with disparate occupational backgrounds.

Qualitative feedback

Liked best

Respondents were asked what they liked best about the event. Forty-one comments were received. Fourteen cited exercises and demos. Twelve said that the introduction to digital preservation and the overview of Planets were the best part of the event. Seven welcomed the opportunity to network and meet other respondents and speakers. A couple of feedback comments noted that the speakers and presentations were very clear and knowledgeable. Six mentioned the general organisation and the venue as being successful aspects of the event.

Done better

Respondents were asked what we could have done better. Thirty-one comments were received. These can be grouped into three categories: the practical exercises, structure of the event; content of sessions and exercises and the venue. One third of the comments related to the exercises. Respondents noted that the exercises need to be better prepared, better structured and that there should be a leader from the Planets team in every workshop group. The exercises were seen as valuable but frustrating due to the lack of structure and shortage of time. Half of the comments related to the structure and content of sessions. These suggested that there should be less overlap between speakers, especially on the morning of day one, and between some sessions on day one and two, as well as more breaks between sessions. A few comments noted that some of the technical sessions were not well presented, that the event in general was a bit experimental and respondents would like to have had presentations some days ahead. Four comments related to the venue. Respondents would have liked a better map of the location, tables in the conference room on day 1, more comfortable seating and a better view of the presentations on the screen. One delegate suggested handing out printed presentations before the actual presentations and to make the access to the presentations on the Planets website more accessible by not making them into pdf.

Would like to see covered

Other things that respondents would like to have seen covered were e.g. integration with existing repositories; Planets in a global context; different preservation strategies; SIARD; the Interoperability framework; emulation and more exercises and practical examples.

Comments specific to day one pointed out that the room was too hot and the chairs too uncomfortable. This could account for higher dissatisfaction with the venue on day one. One delegate suggested that the case study could be provided as an article (although the iPres paper relating to the case study was available in the pre-reading) and to make other case studies on the Planets website. Another comment emphasised that while the content on day 1 was good speakers could have been a little more energetic.

Comments specific to days 2 and 3 related to the points already mentioned. Besides this delegates asked for better planned exercises. They stated that the presentations were excellent but there is a need to teach speakers how to present a topic without being too technical.

Summary and recommendations

The event was well-attended by audiences targeted by the project and indicated that there is high interest in Planets tools and services. Feedback indicated that the event worked well in providing an introduction to issues and challenges associated with preserving digital content and Planets. The event met delegates' expectations and needs overall. For those delegates who attended all three days it met, or almost, achieved targets against all criteria. Three-fifths would consider using Planets in their organisation. Feedback indicates lower satisfaction with day one and this merits further investigation with a sample of day one only attendees before the next event.

Some areas fell short and should be reviewed when planning future events. Specifically:

- Delegates found day one intense. Future events may attempt to be shorter, or to include more intervals, or to break up formal lecture sessions with demonstrations, case studies or

discussion. There may be a need to adapt day one to meet the specific needs of day one only attendees.

- Planning needs to consider how to remove duplication of morning sessions on day one by combining material in sessions 1 and 2 (or de-duplicating), combining or removing one of sessions three and four and again removing overlap with earlier sessions.
- Organisers should visit the venue in advance (as was done with this event) to check its suitability and double-check the venue at the start of each day for hygiene factors e.g. space, comfortable seating, temperature, space to move around, etc.
- Delegates rated speakers highly. However, there was a high degree of variation between sessions. This indicates delegates have very different needs and perspectives on digital preservation and tools that should be taken into consideration at future events.
- The quantitative and qualitative feedback tells us that delegates find demos, case studies and exercises very useful. Future events could usefully include more of these and real-life examples.
- There was a generally positive view of the exercises. However delegates found that they could be better prepared eg. better defined tasks for the group work and clearer introduction to the exercises. Some of the delegates asked for more exercises and more time to practice with the tools.
- Some of the delegates mentioned that the pre-reading was too extensive. Future pre-reading should be clearly divided into core / essential reading plus any other suggested reading. The demand for printed presentations to be available at the event for note-taking could be taken into consideration for future events.
- Some of the respondents showed an interest in cooperating with Planets and have mentioned this in their feedback form (e.g. KEEP project, Protage and DANS-KNAW). We recommend that Planets project management follow up on these requests as soon as possible.

Appendix B. Sofia evaluation report



**'Digital Preservation – The Planets Way' (supported by the Central European Initiative)
Arena di Serdica hotel, Sofia, Bulgaria
16-18 September 2009**

Event evaluation

Planets hosted the second in its series of five Outreach and Training Events: 'Digital Preservation – The Planets Way' at the Arena di Serdica hotel, Sofia on 16-18 September 2009.

The Central European Initiative (CEI) provided a bursary of up to E8500 to support the attendance of 15 delegates in nine specified countries in Southern and Eastern Europe with responsibility for the long-term management of digital collections and whose institutions hold substantial collections and / or collections of national cultural / scientific and research importance.

Day 1 presented the case for preserving digital content, the challenges of digital preservation, introduced Planets tools and services and presented the work of two institutions in Southern and Eastern Europe that are preserving digital collections.

Days 2 and 3 provided practical experience of working with Planets using a scenario (sample collection) to develop a preservation plan and preserve digital objects. The event was structured 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. The content was tailored to meet the needs of the target audience and the level of progression that has been made in terms of digital preservation in the targeted countries.

The delegates had the opportunity to participate in a conference dinner on the evening of the first day of the event.

A total of 27 delegates attended, 15 paying and 12 supported by the CEI, all three days. Twenty completed the feedback form. Appendix A contains the event Evaluation Plan and Appendix B the feedback form.

Success criteria

Delegates participating in the three-day event should have gained:

- 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 two institutions are approaching preservation of digital content;
- An opportunity to engage in initial discussion and share ideas with people involved in research and practical digital preservation;
- Practical skills to start planning 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 technologies;
- An opportunity to engage in discussion, to share ideas and best practice and to build contacts with colleagues in organisations with a need to preserve digital content.

Respondents were asked to rank performance against each of the core objectives, with 1 corresponding to 'poor' and 5 to 'excellent'. They were also asked to rank performance against a set of organisational criteria using the five-point scale and to rank each of the individual sessions.

Success criteria were set at:

- Registration by 50 or more delegates representing target user and supplier communities on day one and 30 or more delegates on days two and three;
- 70 per cent of attendees rate the event as good (4) or better at achieving objectives set;
- 70 per cent of attendees rate components of event organisation as good (4) or better.

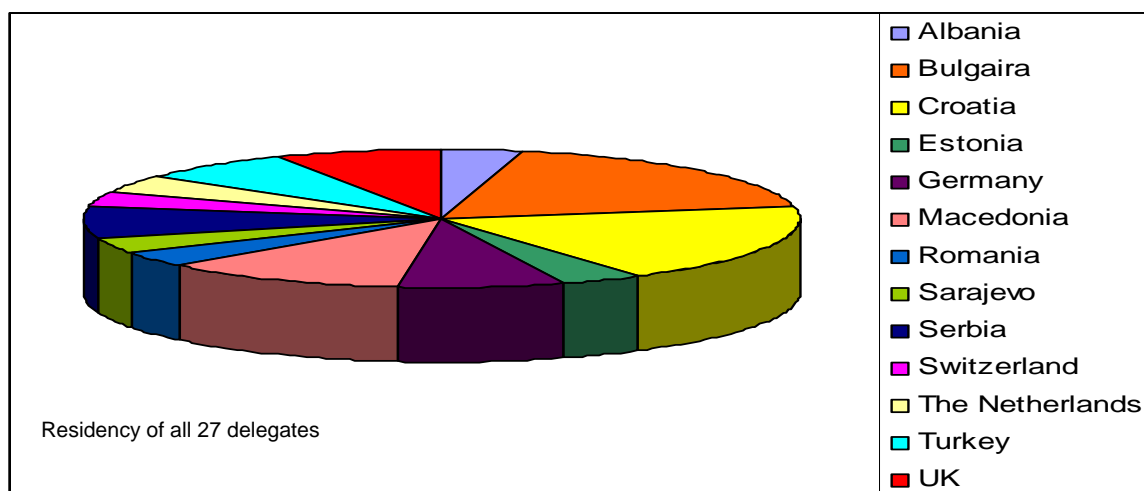
Attendance

Thirty-two delegates registered and 27 attended. All attended all three days.

Audience by geographical region

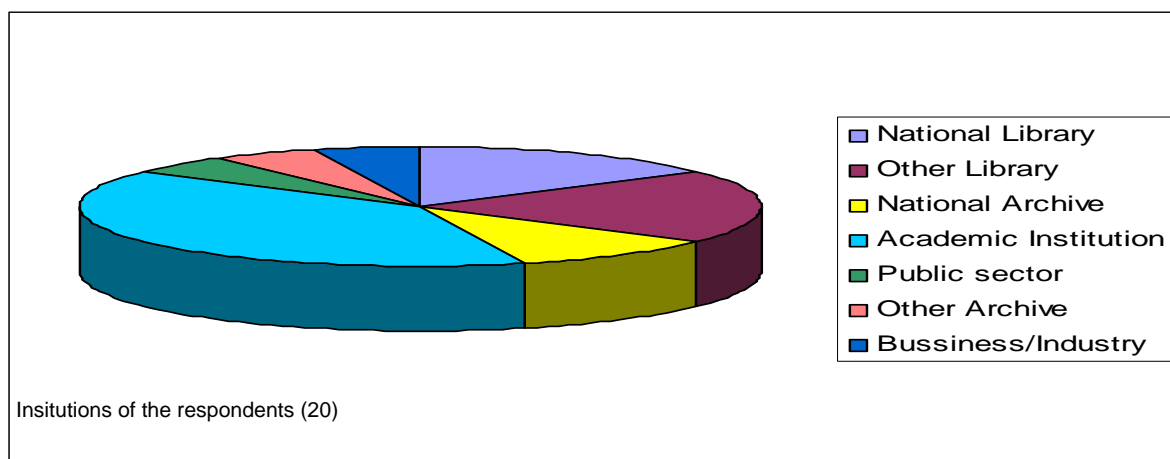
This event aimed to attract delegates from specified countries in Southern and Eastern Europe including: Austria, Belarus, Bulgaria, Czech Republic, Bosnia-Herzegovina; Estonia, Hungary, Latvia, Lithuania, Macedonia, Moldova, Poland, Romania, Russia, Serbia, Slovakia, Ukraine, Greece, Albania, Slovenia, Croatia, Turkey, Cyprus, Malta, and Kosovo.

Three-quarters of delegates came from the targeted countries including four from Bulgaria, four from Croatia and two from Macedonia.



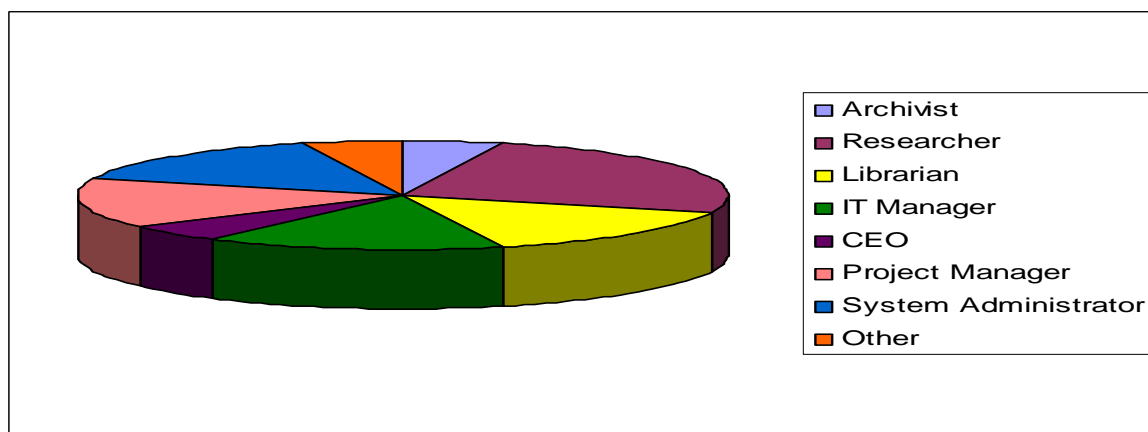
Audience composition by institution type

The event targeted national libraries, national archives and other major content-holders. Three respondents represented national libraries, two national archives and eight academic institutions. The remainder of attendees were from other libraries and archives (five), one represented the public sector and one came from business / industry.



Audience composition by occupation

Day one aimed to attract senior personnel (CEOs, Heads of IT, Curation and Preservation) as well as technical preservation, curation and IT staff. Days 2 and 3 were aimed more specifically at digital preservation staff (e.g. librarians, archivists, digital librarians and archivists, repository managers, software developers, policy managers etc.) Of nineteen respondents, the majority were practitioners including librarians (three), archivists (one), researchers (five) or IT staff (six). Three project managers and one CEO attended.



At-a-glance

All delegates received a Planets feedback form based on the evaluation plan for the event. CEI bursary delegates were also asked to complete a separate CEI feedback form (Appendix C). The results are contained in Appendix D. All respondents were asked to rank individual sessions and speakers. The speaker evaluation is contained within a separate document and will be made available confidentially to speakers and organisers.

Attendees were invited to complete a pre-questionnaire (Appendix E) three weeks before the event. The responses are summarised in Appendix F.

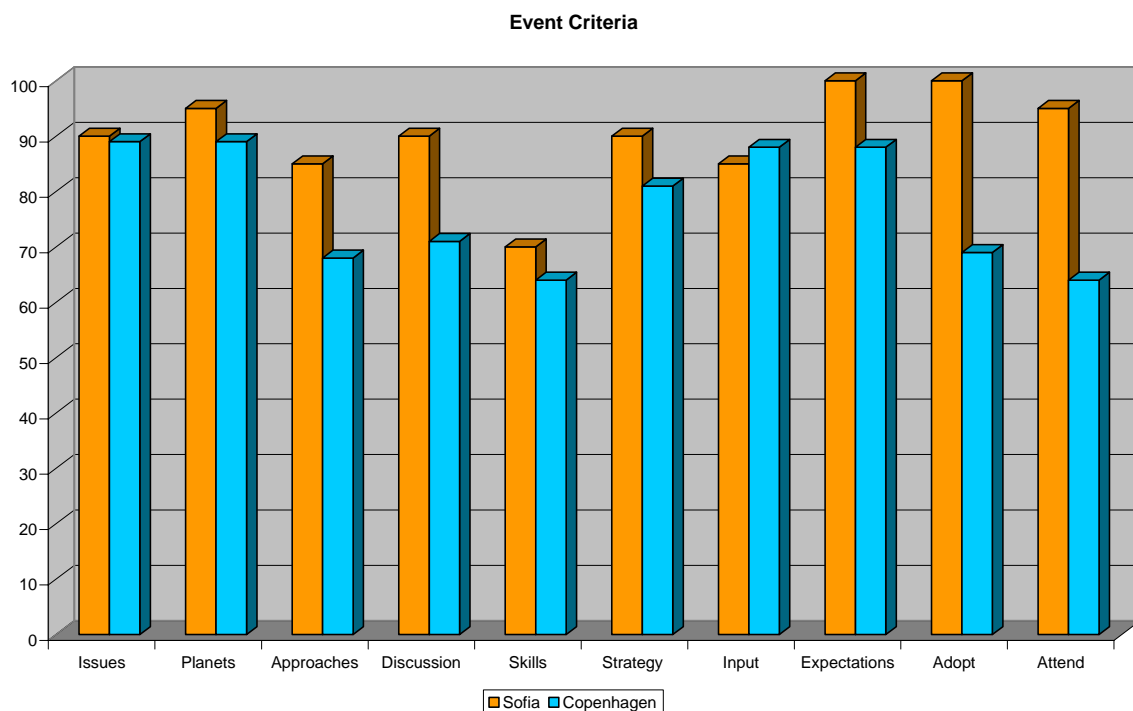
The following table summarises respondents' feedback against each criterion. The row labelled 'Actual' indicates the percentage of delegates who rated the event as 'good' (4) and 'excellent' (5). The 'Variation' row indicates the difference between the actual and target scores. Negative values are shown in red.

Event Criteria (all delegates)

	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70
Actual	90	95	85	90	70	90	85	100	100	95
Variation	20	25	15	20	0	20	15	30	30	25

All respondents said the event was good or better at meeting their expectations. The event exceeded 70 per cent good and better ratings against all event criteria. All respondents said that they would consider using Planets. Nineteen delegates (95 per cent) rated it good or better at introducing Planets, helping delegates to see how Planets could work in their organisation and said that they would attend similar events. Eighteen delegates (90 per cent) said that the event helped them to understand the general issues and challenges associated with preserving digital content and it allowed them to engage in discussion and seventeen delegates (85 per cent) to ask questions and input.

The event met its targets on providing delegates with practical skills; however this score continues to be lower than other criteria. Planning for future events will need to take into account the fact that all delegates at the Sofia event attended all three days and that feedback from the Copenhagen event relating to day one should be considered.



Comparison between feedback from delegates who attended all three days of the Sofia and Copenhagen events shows performance improved at Sofia on most criteria with the exception of the opportunity to input and ask questions, which scored slightly lower. The second event scored

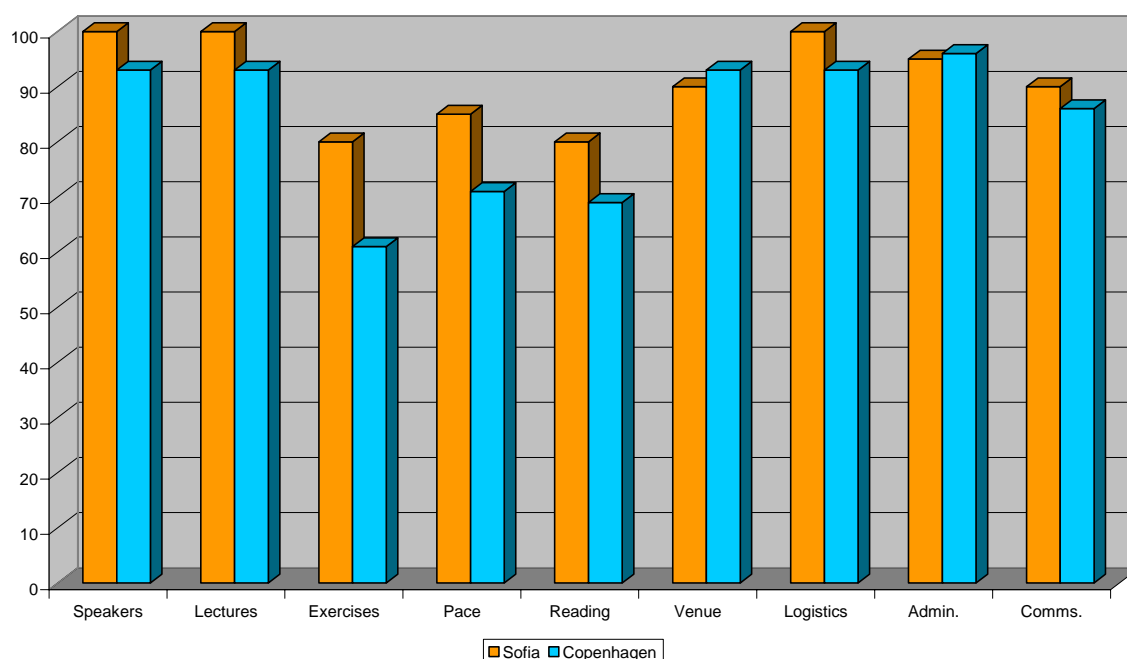
better on encouraging attendees to adopt Planets; willingness to attend future events; involving delegates in discussion; providing real-life examples of digital preservation in action and meeting expectations.

Organisational Criteria (all delegates)

	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	100	100	80	85	80	90	100	95	90
Variation	30	30	20	15	10	20	30	25	20

The event exceeded the target of 70 per cent good or better against all organisational targets. All respondents rated both the speakers and the content of the lectures across all three days as good or excellent. Sixteen delegates (80 per cent) ranked practical exercises as good and better. All delegates rated organisation and logistics as good or better; nineteen (95 per cent) administration; eighteen (90 per cent) communication, the venue and catering; seventeen (85 per cent) the structure of the event and sixteen (80 per cent) the pre-reading.

Organisational Criteria



Comparison between feedback from delegates who attended all three days of the Copenhagen and Sofia event shows improvement of the second event against most criteria with the exception of the venue and administration. Particular improvement was seen in terms of the pace of the event, the content of exercises, pre-reading, the content of the lectures, the speakers and logistics. Delegates seemed to benefit from the simpler and less technical presentations, the structuring of practical

exercises and the Plato 'teach-in' for facilitators the day before the start of the event. The pre-reading list benefited from the work to consolidate and reduce the number of required items.

Speakers

"The speakers were well organised and their presentations were a valuable introduction to the Planets tools. They were a great resource for further discussion."

A full evaluation of sessions and speakers is documented separately in the Feedback Summary Speakers and is confidential to speakers and organisers. However, all but one session (due to technical problems) achieved over the target 70 per cent good and better. Six speaker sessions attained a 100 per cent good or excellent scoring.

Qualitative feedback

Liked best

Respondents were asked what they liked best about the event. Nine comments were received. Three appreciated the opportunity for discussion and to share experiences with colleagues. Two commented on the practical exercises. Two said the event covers topics which are problems they face. Two commented on the overall organisation and work by organisers and speakers. Other comments referred to: the fact that the sessions were each well-structured, clear, easy-to-understand and well-illustrated; the inclusion of movies and diagram and the balanced programme combining theory and practical. One said they would recommend Plato and the Testbed to their institution.

Done better

Respondents were asked what we could have been done better. Seven comments were received. One would have liked more practical exercises. Two said that there needed to be more laptops as they needed to do rather than watch the exercises. One said there could be more explanation of the tools, giving more time to look into the solutions and another that it would be useful to have time to work on their own testing Plato and Testbed but with experts on hand in case there were questions or problems. One suggested a more logical order for the programme may be 'tools for analysing -> tools for testing -> production tools'.

Would like to see covered

Six comments were made about items that delegates would have liked to have seen covered. These included: the need to be kept up-to-date with information and for concrete techniques for digital preservation; a suggestion there should be more case studies and examples of implementation of Planets tools. One said they would like to understand how to create preservation plans for new digitisation projects and to assess digital preservation requirements and include them in project budgets. One wanted to see information about copyright issues covered. One said the programme should take into account the different circumstances of libraries and archives.

Other comments

Other comments related to the practical exercises on day three and believed that the Testbed and Plato will be very good platforms for planning and archiving.

One said they would like to receive more information about Planets and help when their organisations begin their respective digital preservation projects.

There were notes of thanks and general praise about the organisation.

On a practical point, it was noted that the video dashboard could have been bigger.

Summary and recommendations

The event was successful in attracting delegates from the targeted countries; the CEI bursary promotion also received a good response. The feedback was positive and indicated that the delegates found the three days well-organised, structured, interesting and informative. The event met the delegates' expectations and needs overall and against individual criteria and an improvement on the scores from the previous event. Each of the event criteria met or exceeded the targets. All attendees would consider using Planets in their organisation and the majority would

consider attending similar events. As all delegates attended all three days, the feedback form for the Bern event should have a separate section for delegates attending day one only in order to gauge whether satisfaction has improved from the one day delegates at Copenhagen.

Although almost all of the event and organisation criteria exceeded the set target, there are still some areas that need to be reviewed and considered when planning the remaining events. Specifically:

- [From Copenhagen] Delegates found day one intense. Future events may attempt to include more intervals, or to break up formal lecture sessions with demonstrations, case studies or discussion. As this cannot be measured for this event, there may still be a need to adapt day one to meet the specific needs of day one only attendees.
- It may be useful to consider inserting short 'in-seat' practical activities to break up day one eg. exercises enabling delegates to log-in and see the functions that can be carried out by the different elements of Planets.
- If it is not possible to make additional laptops available, future event notices should explain that delegates should bring a laptop, if they want to work on exercises individually. It may be more practical to hold the future events in venues which have a computer lab available.
- Delegates rated speakers highly. However, there was one session that did not meet the target, largely because of technical issues.
- Delegates have said they would like to see copyright issues covered. They would also like sessions to refer to how Planets may apply to the different needs of libraries and archives. Future events may want to consider grouping delegates into library and archive groups and to have them work on tailored exercises.
- The quantitative and qualitative feedback tell us that delegates find demos, case studies and exercises very useful. Although the programme has been structured to include more of this, feedback still indicates that delegates would have liked more and more time on practical exercises. It could be beneficial to introduce a practical exercise on day one, or to show the delegates a short demonstration on how to log in to Testbed and Plato.
- It may become possible in future events to set up exercises that simulate a real-life case studies; and at future events, for example in Bern where SFA will present, to explain how Planets will be used in a real library or archive setting.
- Some of the respondents showed an interest in keeping up to date with the Planets project and receiving future support for their institution once they start to implement digital preservation. Delegates should be reminded about the Planets user community and info mailboxes during the opening and closing sessions, at the end of presentations / on presentation slides and in follow-up e-mails so that they know where to go if they have any questions. It would also be useful to direct delegates to one person (most probably Clive) as the point of contact for any specific enquiries during the event. These can then be logged in the spreadsheet and a response followed up and coordinated within BL.
- The feedback form should be amended to ask delegates for their name and contact details and to indicate whether we can contact them for permission to use their quotes for future promotion, but offer a tick box to remain anonymous if they wish.

Appendix C. Bern evaluation report



‘Digital Preservation – The Planets Way’

The Swiss Federal Archives, Bern / 17-19 November 2009

Event evaluation / Amir D. Bernstein

On 17-19 November Planets hosted the third in its series of outreach events: Digital Preservation – The Planets Way at the Swiss Federal Archives in Bern.

The event succeeded in meeting its target of attracting a total of 60 registrations for the first day. Thirty-five delegates also participated on days 2 and 3.

Day 1 offered a general introduction into Planets and the challenges of digital preservation. A case study of digital preservation at the Bavarian State Library in Munich gave delegates insights into how digital preservation can be approached and conducted in practical terms.

Days 2 and 3 provided in-depth information on a variety of Planets tools (e.g. PLATO, Testbed as well as Preservation Action services and applications). In small groups delegates had the opportunity to experience practical work with both PLATO and the Testbed. Day 2 also offered a second case study on digital preservation at the Swiss Federal Archives.

Success criteria

Delegates participating in day one of the event should have gained:

- An understanding of the need to preserve digital content and the risk management issues involved
- An introduction to the preservation planning cycle, the Planets framework, tools and services
- The advantages / usability of the Planets project outputs
- An insight into work on digital preservation in practical terms (i.e. through two case studies)
- An opportunity to engage in initial discussion on digital preservation

Delegates participating in all three days of the event should have **also** obtained:

- First practical experience with Planets tools and services (e.g. Plato preservation planning tool)
- An understanding of Planets’ potential contribution to their organisation
- An opportunity to receive information about and provide input to Planets
- An opportunity to engage in discussion and to exchange ideas and best practice about digital preservation

Delegates were asked to rate performance against each of these core objectives on a scale of 1 to 5 (1 being ‘poor’ and 5 ‘excellent’). They were also requested to rank performance against a set of organisational criteria such as quality of venue, communication, organisation, &c.

The target was to achieve a minimum of 70% of the 'very good' (4) or 'excellent' (5) ratings for all the above-mentioned success criteria.

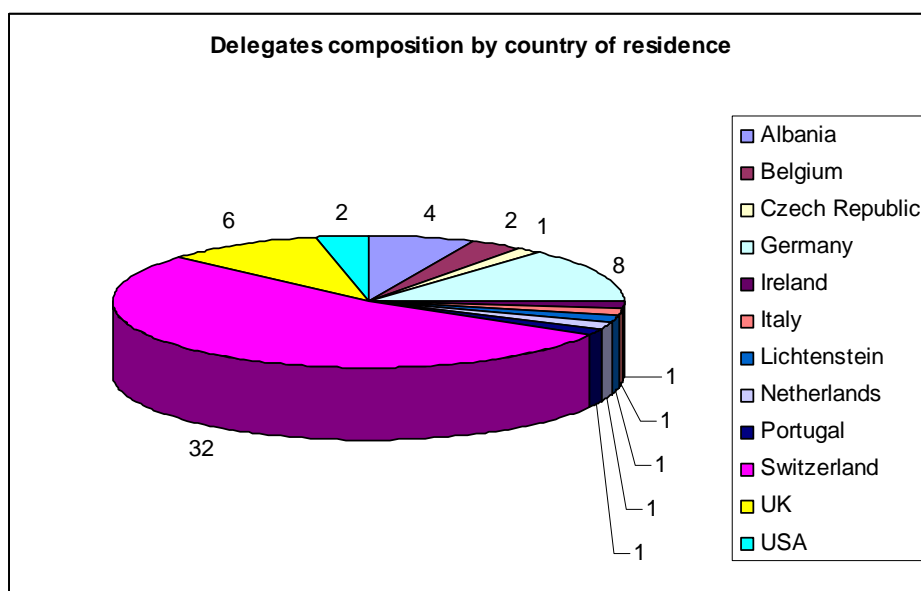
Attendance

Sixty delegates registered to the event and 57 attended day 1. Thirty-five delegates attended all three days. The event exceeded its original target.

Audience by geographical region

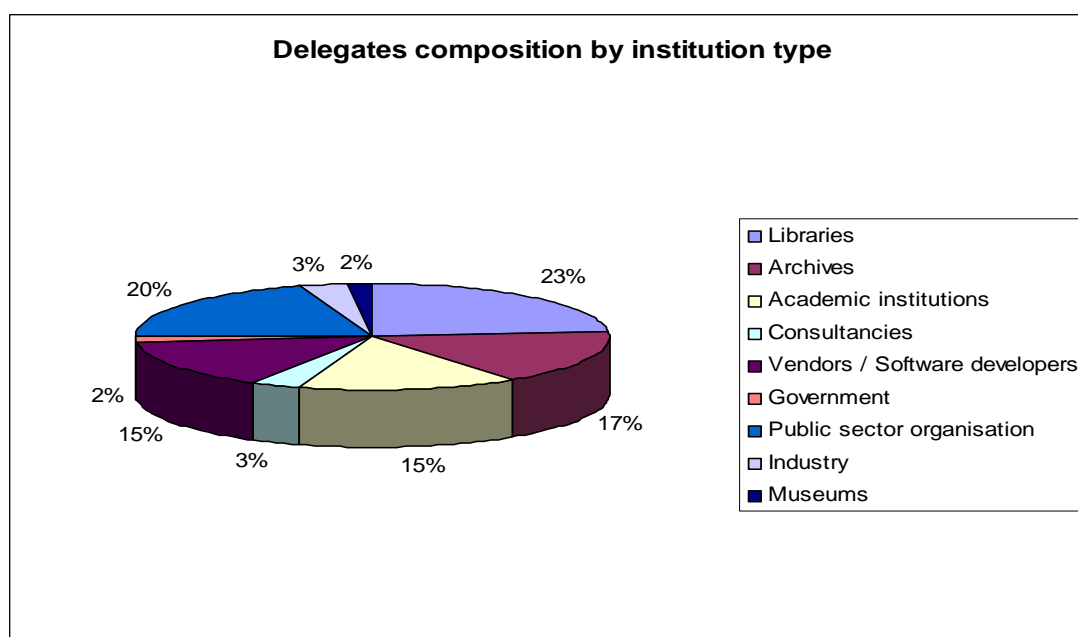
This event aimed to attract delegates from Central Europe. Specifically: Austria*, Bosnia, Croatia, Czech Republic*, Germany*, Hungary*, Liechtenstein, Poland*, Slovenia, Switzerland, Italy*, France*, Monaco*, Belgium* (where * indicates the country will be targeted by more than one event).

More than 80 per cent of the delegates came from the targeted countries, mostly from Switzerland and Germany. The event has also attracted delegates from the USA, the UK and Ireland.



Audience composition by institution type

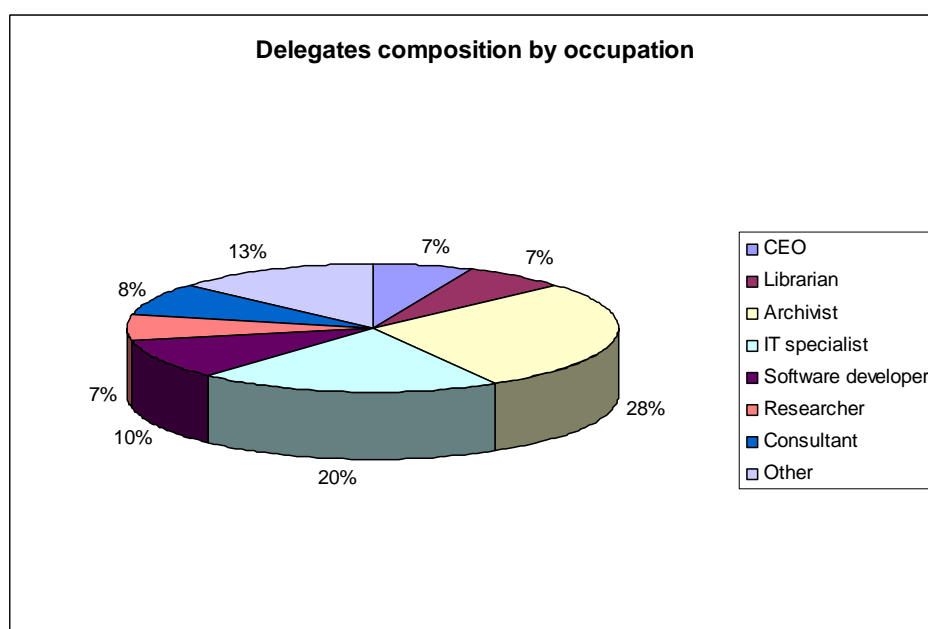
The event targeted libraries and archives as well as other major content-holders. Forty per cent of respondents represented libraries and archives. The event also attracted interest from academic institutions (fifteen per cent) and public sector organisations – twenty per cent (inter alia major NGOs and International Organisations), and from software vendors and developers (fifteen per cent).



Audience composition by occupation

Day 1 was aimed at senior personnel (CEOs, Heads of IT, Curation and Preservation) as well as technical preservation, curation and IT staff. Days 2 and 3 were aimed more specifically at digital preservation staff (e.g. librarians, archivists, digital librarians and archivists, repository managers, software developers, policy managers etc.)

Twenty eight per cent of respondents were archivists, 7 per cent librarians and 30 per cent IT specialists or software developers. Only four CEOs participated in the event.



I. Event evaluation – in a glance

The following tables summarise respondents' feedback against each objective. The row labelled 'actual' indicates the percentage of delegates who rated the event as 'very good' and 'excellent'. The 'variation' row indicates the difference between the actual and target scores. Negative values are shown in red.

Event Criteria (all delegates)

	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Met expectations	Consider using Planets	Attend similar events
% Target	70	70	70	70	70	70	70
% Actual	73	88	66	71	93	93	98
% Variation	+3	+18	-4	+1	+23	+23	+18

Almost all respondents said the event was good or better at meeting their expectations. Almost all (ninety-eight per cent) said they would be interested in attending similar events. Ninety-three per cent would consider using Planets in their organisation. The event also scored highly on introducing Planets (88 per cent). The event met targets in terms of helping delegates to understand the issues and engaging them in discussions. It scored less well on providing examples of how organisations are practically approaching digital preservation.

Organisational Targets (all delegates)

Over seventy per cent of respondents rated the Bern outreach and training event as good or better in terms of administration (90 per cent), organisation and logistics (88 per cent), content of sessions (88 per cent) speakers (85 per cent), structure (83 per cent) and venue and catering (78 per cent). In line with feedback from previous events, it scored less well in terms of the structure, content and execution of exercises (61 per cent) and pre-reading (68 per cent). Satisfaction with pre-reading has however improved since the reading list was reconfigured.

	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
% Target	70	70	70	70	70	70	70	70	70
% Actual	85	88	61	83	68	78	88	90	83
% Variation	+15	+18	-9	+13	-2	+8	+18	+20	+13

II. About the event

The following section analysis the event results in detail, measuring both event criteria and organisational targets separately for day 1 delegates, and for 3 days delegates.

Event Criteria (Day 1 delegates)

	Understanding why to preserve digital content	Introduction to Planets	Understanding how some organisation approach DP	Opportunity to engage in discussions on DP	The event has met my expectations	I would consider using Planets in my organisation	I would expect to attend similar event in the future
% Target	70	70	70	70	70	70	70
% Actual	90	95	85	90	90	90	100
% Variation	+20	+25	+15	+20	+10	+10	+20

The Bern event received very high ratings among the day 1 participants. All targets were exceeded by at least 10 per cent. A clear majority of day 1 participants has gained understanding of Planets, its structure. Most (90%) believe Planets can be used their own organisation. The event met the expectation of ninety per cent of day 1 respondents and all respondents without exception said that they would expect to attend a similar Planets event.

Organisational Targets (Day 1 delegates)

	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
% Target	70	70	70	70	70	70	70	70	70
% Actual	89	90	100	100	60	60	100	90	80
% Variation	+18	+20	+30	+30	-10	-10	+30	+20	+10

The Bern event exceeded most organisational targets in terms of the speakers, the content of the sessions and exercises, the event structure, logistics etc. Only two targets were not met: the pre-reading material and the venue / catering (both received a rating of sixty per cent). Though Planets constantly adjusts the pre-reading list it cannot exactly predict the level of the audience. The venue and catering received a low rating presumably due to the quality of the catering on the first day.

Event Criteria (3 days delegates)

	Understanding why to preserve digital content	Introduction to Planets	Understanding how some organisation approach DP	Opportunity to engage in discussions on DP	The event has met my expectations	I would consider using Planets in my organisation	I would expect to attend similar event in the future
% Target	70	70	70	70	70	70	70
% Actual	74	87	71	77	94	93	97
% Variation	+4	+17	+1	+7	+24	+23	+27

The event succeeded in meeting and exceeding all the event criteria targets for delegate attending all three days (hereafter: 3 days delegates). A clear majority (93%) believes Planets could be used in their organisation and almost all expressed interest in attending a similar Planets event in the future

The 3 days delegates were also requested to evaluate the following criteria: practical skills in digital preservation acquired in the course of the event, understanding of how Planets can fit in their organisation and an opportunity to interact with the project team and provide it with input.

	Practical skills	See Planets in my organisation	Ask questions and give input
% Target	70	70	70
% Actual	66	83	79
% Variation	-4	+13	+9

Eighty-three per cent of all days respondents have a clear understanding of how Planets can fit into their organisation. Seventy-nine per cent also believed the event provided opportunities to ask questions and provide the project team with an input. In line with feedback from previous events, slightly less than target (66 per cent) of respondents believe the event has scored good or better at providing them with practical skills to carry out digital preservation.

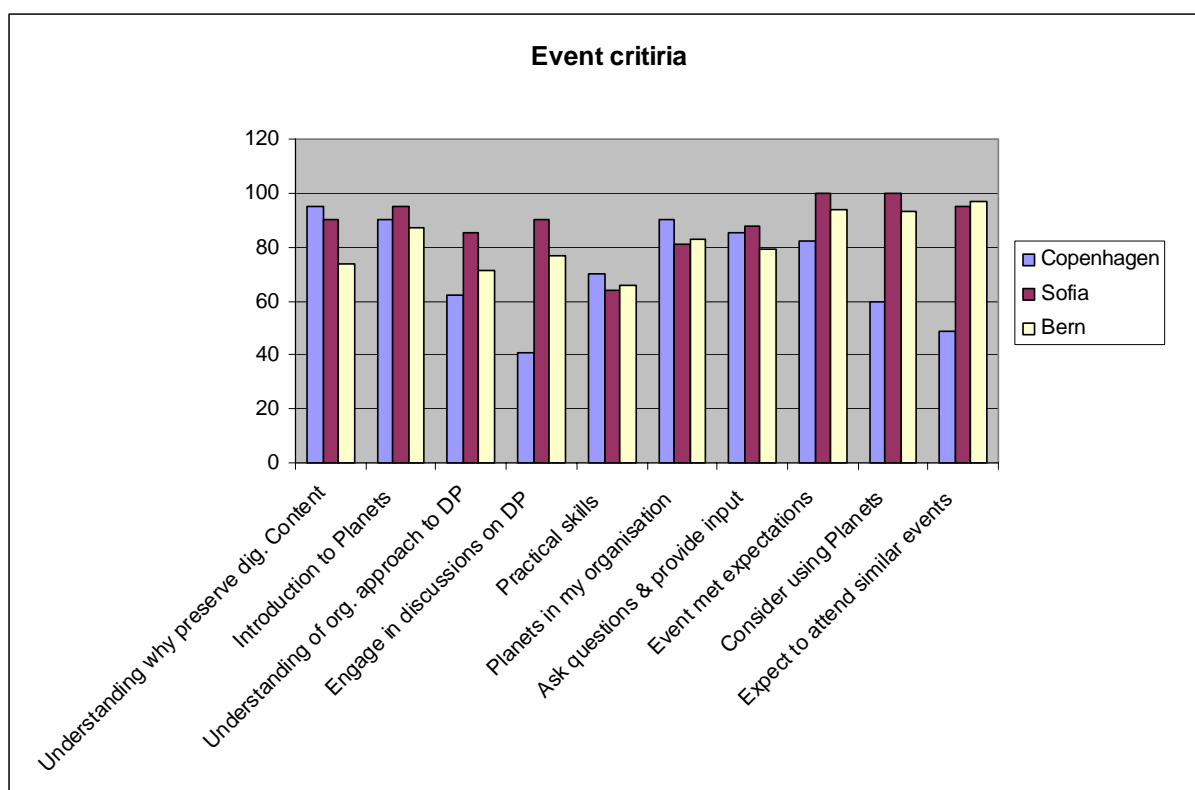
Organisational Targets (3 days delegates)

	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
% Target	70	70	70	70	70	70	70	70	70
% Actual	90	87	55	77	70	84	84	90	84
% Variation	+20	+17	-15	+7	0	+14	+14	+20	+14

Almost all organisational targets were met, most were exceeded. The venue and catering received a rating of eighty four per cent (in comparison to only sixty per cent by the day 1 delegates), organisation, administration and communication were also rated highly (clearly above seventy per cent). Speaker quality was also highly rated at ninety per cent.

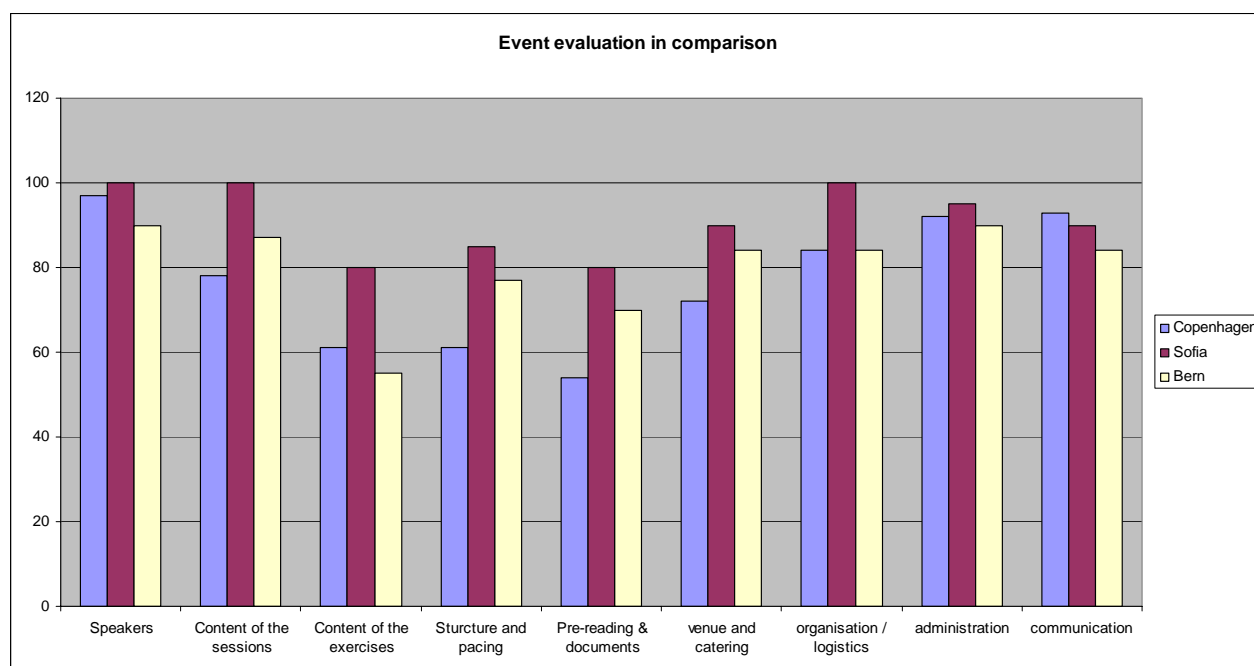
The practical exercises did not achieve the target (only fifty five per considered these to be very good or excellent). This is due to difficulties in executing the Testbed and because of delegates' expectations to be involved in a more hands-on oriented session.

A comparison between the first three Planets events indicates that all events have performed well in providing an introduction to Planets and helping respondents to understand the issues. The Bern and Sofia events have shown improvement in terms of respondents' willingness to consider using Planets in their organisation and to attend a similar event in future. The Bern and Copenhagen events have not met expectations in terms of giving respondents an understanding of how organisations are practically approaching the problem and opportunities to engage in discussion.



Organisational Targets (3 days delegates)

A comparison with the last Planets outreach event indicates that the events have consistently enabled respondents to see how Planets tools and methods can fit into their organisations and provided respondents with an opportunity to ask questions and provide input. However, the feedback now consistently shows that the events score less well on providing respondents with practical skills.



Taking 70 per cent good or better as the baseline, all events have been rated highly in terms of the quality of speakers, content of sessions, organisation and logistics, administration and communication. The Sofia and Bern events have scored particularly highly in terms of the venue and catering and structure and pacing. Bern scored slightly less well than Sofia in terms of the content of the exercises and pre-reading. This may reflect some difficulties experienced with being able to execute the Testbed exercises.

Speakers

Most speakers were rated above the 70% target. A rating of 85% or higher was achieved by 7 speakers.

A full evaluation of sessions and speakers is documented separately and is confidential to speakers and organisers.

Qualitative feedback

Liked best

- General introduction to the work of the Planets project
- Tools demonstrations
- A good opportunity to interact with other colleagues in the field of digital preservation
- Keynotes presentations on digital preservation

Done better

- More demonstration
- More technical hands-on practical exercises (with Plato, Testbed, and preservation action tools)
- More Concrete examples of how Planets can be used in institutions and organisations (e.g. small organisations)
- Possibly a more compact format (only 2 days event)

Would like to see covered

- Some background on the Planets project (history, scope &c)
- More information on preservation action for other formats (e.g. CAD, GIS, PDF)

Summary

The Bern outreach event was successful in attracting delegates from the targeted countries. The general feedback was positive. It confirmed that delegates found the three-days-conference to be well structured and organized.

Most of the event criteria met or exceeded the targets. The majority of respondents would consider using Planets in their organisation and attending similar events.

The feedback analysis also established two central challenges for the upcoming event in London:

- A general introduction to the Planets project, in terms of the project's history, scope and development, is missing. It is recommended to add a broader introduction to the project on day 1.
- The breakout sessions / practical exercises are still a challenge in terms of content and organisation. Most respondents would like to have the opportunity to work hands-on with the Planets tools and services. It is therefore recommended to review anew the format of the breakout sessions.

Recommendations

The local team at the Swiss Federal Archives was well prepared for the conference. However the assistance of a member of DT6 from HATII (with experience from previous outreach events and with a broader overview of DT6 activities) was invaluable.

- It is recommended that a HATII DT6 member will be assigned to and participate in the next Planets outreach events.

Appendix D. London evaluation report



Digital Preservation – The Planets Way The British Computer Society, London 9-11 February 2010

Event evaluation

Planets presented a three day Outreach and Training Event: Digital Preservation – The Planets Way at the British Computer Society, London on 9-11 February 2010.

Day one was intended to provide an overall introduction to digital preservation and Planets tools. Days two and three were intended to provide practical training on digital preservation and Planets technology, tools and services. They included exercises in groups based on real and conceptual examples, demonstrations and facilitated discussion. The event aimed to stimulate delegates' interest in Planets and equip them with information, skills and examples that will help them and their organisations to implement the outputs of the project.

The delegates had the opportunity to participate in a conference dinner on the evening of the first day of the event. Thirty nine delegates and speakers took part in the dinner.

A total of 72 delegates attended the event, and 68 completed the feedback form. The high response rate is possibly due to offering a USB stick and attendance certificate on submitting the feedback form.

Eighty-eight per cent (30) of delegates on day one and 100 per cent (38) of delegates attending all three days completed the feedback form. Appendix 1 contains the feedback form and Appendix 2 the event Evaluation Plan.

Success criteria

Day one aimed to give delegates:

- 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 organisation is 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

Days two and three aimed to give delegates:

- Practical skills to start planning the preservation of 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

Respondents were asked to mark performance against the core objectives, with 1 corresponding to 'poor' and 5 to 'excellent'.

The targets for the event were:

- Attendance by 50 or more delegates for Day one (max. 100 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 at achieving objectives set
- 70 per cent of attendees rate components of event design as good or better.

Attendance

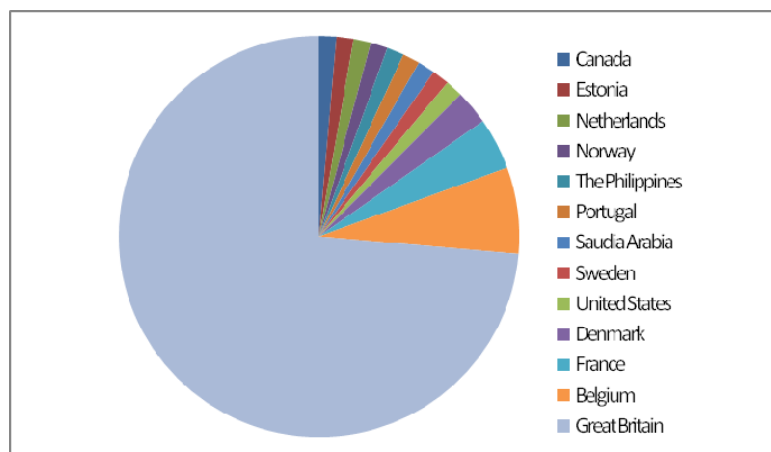
There was a high attendance rate. Seventy five delegates registered for day one and 72 delegates attended. Thirty eight registered for all three days and 34 attended, plus one delegate attending for days one and two only.

The DPC was offered 40 places on day one at a discounted rate. Forty six per cent of delegates represented organisations which were members of the DPC.

Audience by geographical region

This was the fourth in a series of five events and had as its geographical focus attendees from countries in Western Europe. Specific countries targeted were: Belgium, France, Germany, Ireland, Netherlands, Luxembourg, the UK, Spain, Portugal, Italy, Switzerland, and Austria. Eighty eight per cent of delegates came from these targeted countries.

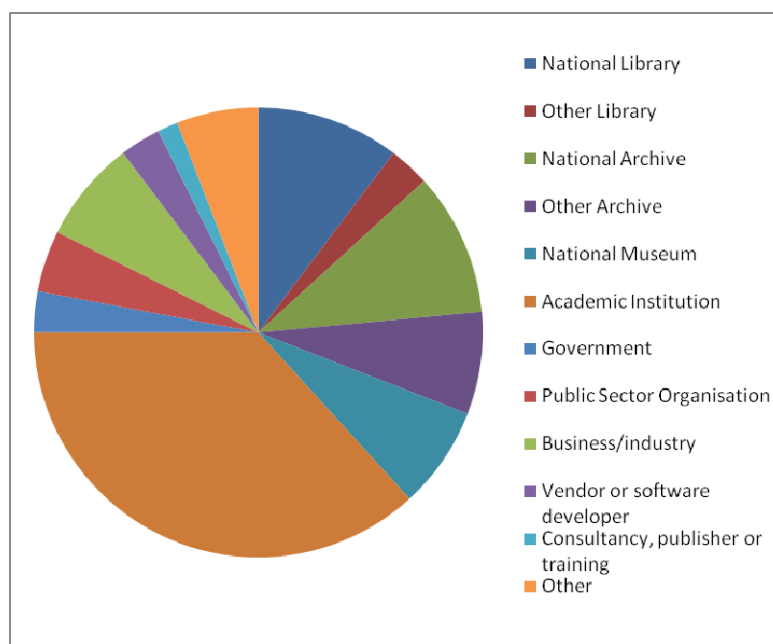
Attendance by country:



Audience composition by institution type

The event was targeted at National Libraries, National Archives and other major content-holders. Thirty seven per cent of all attendees represented academic institutions, 10 per cent National Libraries and 10 per cent National Archives.

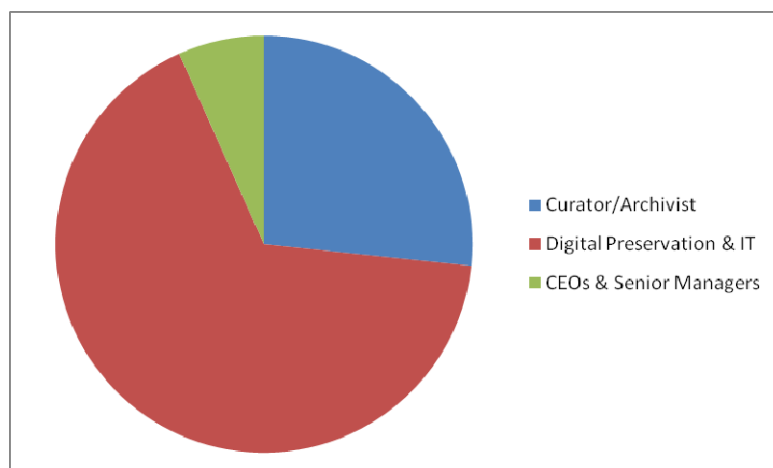
Attendance by institution type:



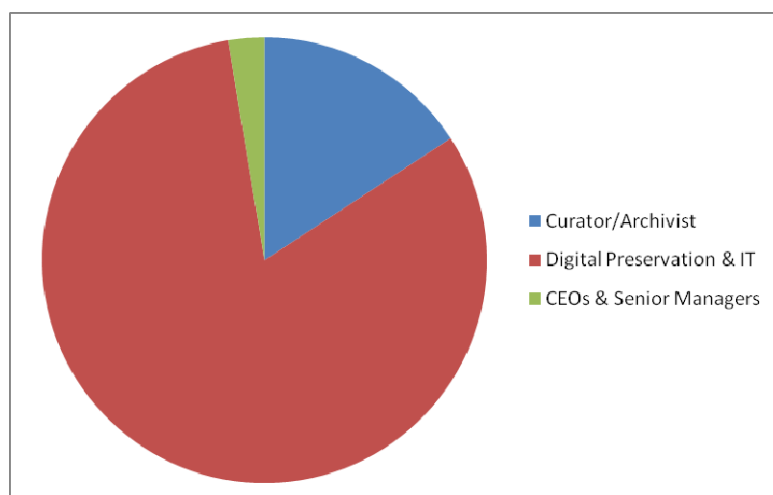
Audience composition by occupation

Day one of the event aimed to attract senior personnel (CEOs, Heads of IT, Curatorial and Preservation functions) as well as technical preservation, curatorial and IT staff. Days two and three were targeted more specifically at digital preservation staff (e.g. librarians, archivists, digital librarians and archivists, repository managers, software developers, policy managers etc.). Seventy five per cent of respondents on days two and three were IT and digital preservation staff. A further 4 per cent were CEOs and senior managers. The remainder were curators.

Audience by occupation – Day 1 delegates only:



Audience by occupation – Entire event delegates:



At-a-glance

The following tables summarise respondents' feedback against each objective. The row labelled 'Actual' indicates the percentage of delegates who rated the event as 'good' or 'excellent'. The 'Variation' row indicates the difference between the actual and target scores. Negative values are shown in red. All delegates received the same feedback form.

Some questions on the form were not applicable to day one only delegates and any responses received were discounted. Attendees were also asked to complete a pre-questionnaire three weeks before the event. This is contained in Appendix 3. The responses are summarised in Appendix 4. Respondents could also mark individual sessions and speakers. This has been analysed in a separate document which is confidential to those involved in planning and delivering the training.

Event Criteria (totals for all delegates)

(per cent)	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70
Actual	83	94	57	82	78	75	87	84	81	79
Variation	13	24	-13	12	8	5	17	14	11	9

On both day one and all days the event met expectations. Respondents rated the event highly in providing them with an understanding of issues and an introduction to Planets; enabling them to see how Planets could fit into their organisation and engage in discussion about preserving digital content. Almost four-fifths would consider using Planets and attend similar events in future. The event was less effective at demonstrating real examples of approaches to digital preservation.

Organisational Targets (totals for all delegates)

(per cent)	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	89	89	76	79	72	88	90	95	95
Variation	19	19	6	9	2	18	20	25	25

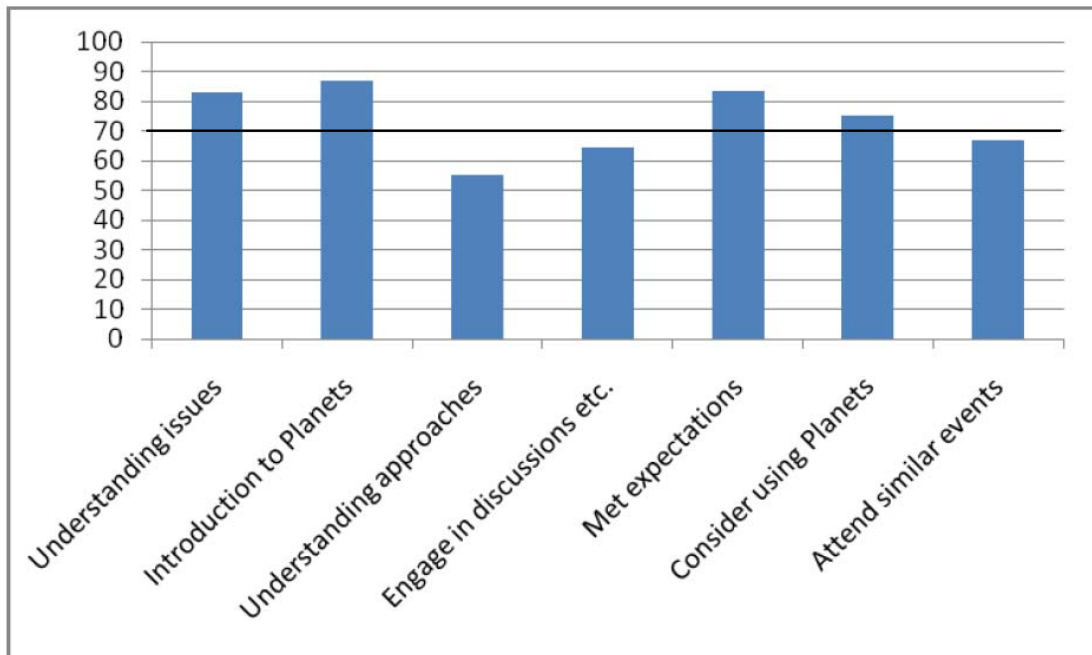
Speakers scored highly on both days with almost all respondents rating them as good or better. The organisation, administration and communication also scored highly. Delegates were less satisfied with the content of exercises and with the pre-reading, with a couple of respondents reporting that they were not aware of having received the suggested reading list.

About the event

The first table shows a summary of responses by day one only respondents only and the second table shows a summary of responses by respondents who attended all three days.

Event criteria*Day 1 only-respondents*

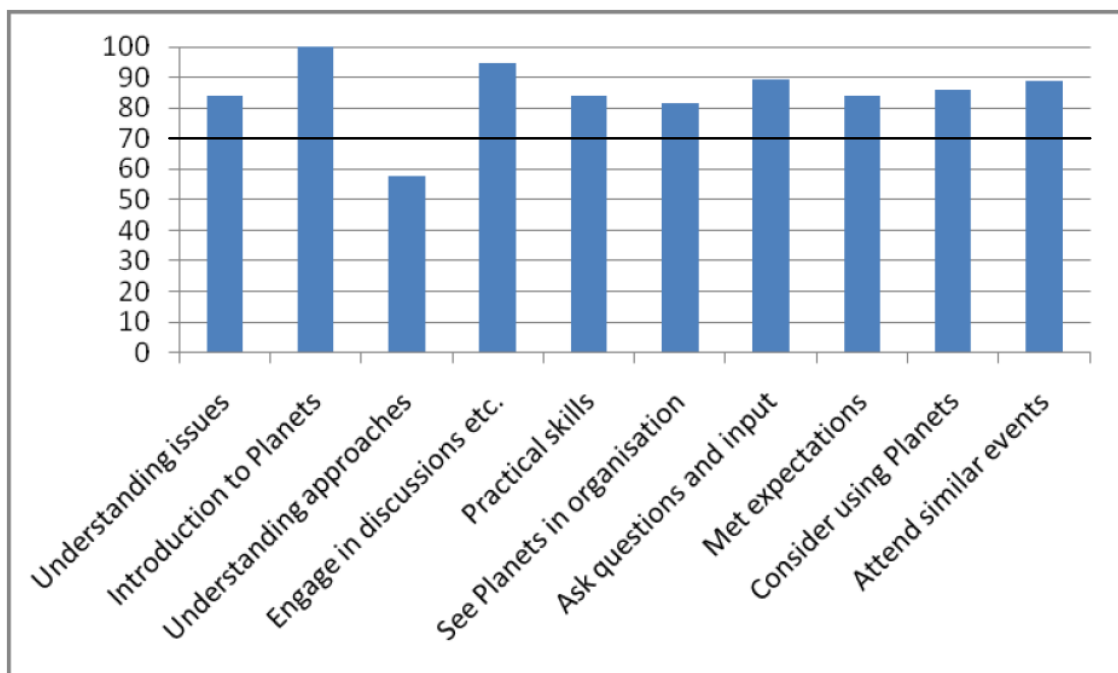
(per cent)	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70
Actual	83	87	55	64	83	75	67
Variation	13	17	-15	-6	13	5	-3



Day one respondents rated the event highly for providing an understanding of issues, an introduction to Planets and in meeting their expectations. It scored less well in helping delegates to understand approaches to digital preservation or engaging them in discussion. Two-thirds would consider attending a similar event and using Planets.

All days - respondents

	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Practical skills	See Planets in organisation	Ask questions and input	Met expectations	Consider using Planets	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70
Actual	84	100	58	95	84	82	89	84	86	89
Variation	14	30	-12	25	14	12	19	14	16	19



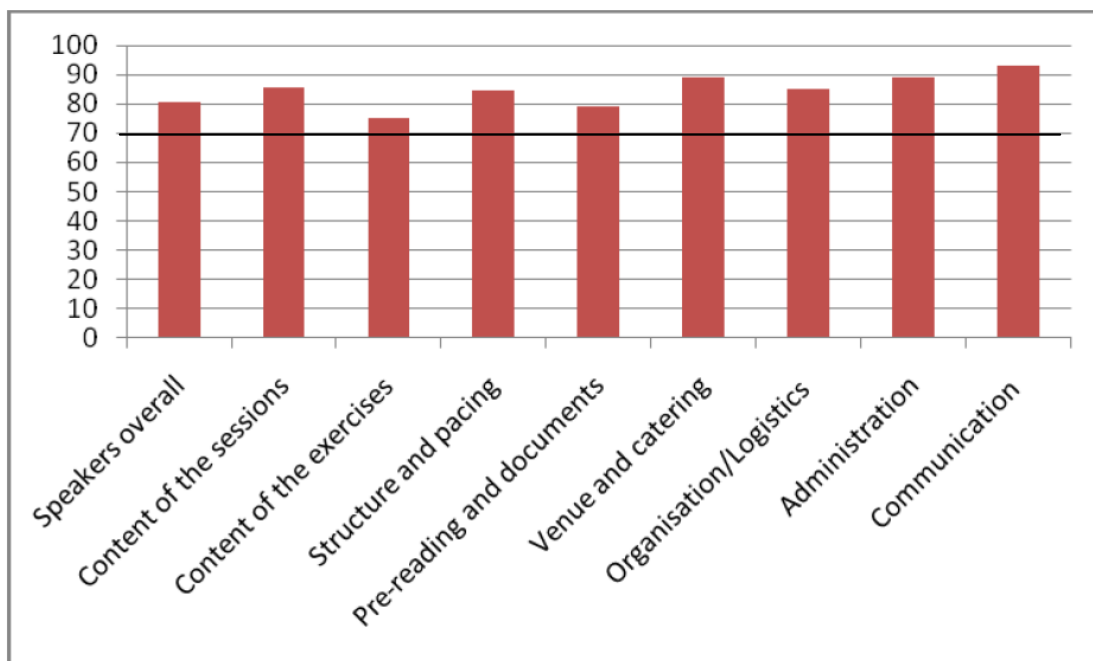
By contrast respondents attending on all days rated the event well above target against all but one criteria. The event was scored least highly for providing an understanding of digital preservation approaches. All delegates felt that the event gave them a good or excellent introduction to Planets.

Of those who are less likely to consider using Planets at their organisation, one delegate said that whilst the tools were very large scale and comprehensive, their organisation was too small to use them sensibly. Another said that the tools would only be of use in non-technical areas.

Organisational targets

Day one respondents:

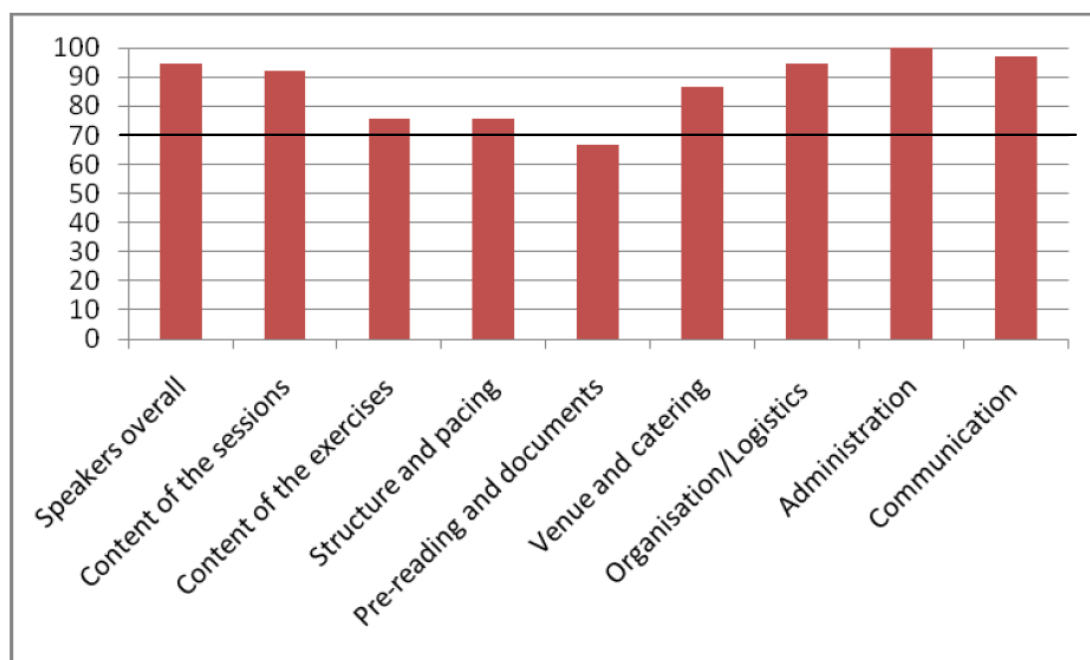
	Speakers	Content of sessions	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70
Actual	81	86	85	79	89	85	89	93
Variation	11	16	15	9	19	15	19	23



Day one respondents rated the content of sessions, venue and catering, administration and communication particularly highly. All criteria met and exceeded the target of 70 per cent of more markings as 'good' or 'excellent'.

All-days respondents:

(per cent)	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	95	92	76	76	67	86	94	100	97
Variation	25	22	6	8	-3	16	24	30	27



Over 90 per cent of delegates attending all days rated as good or excellent the speakers and content of sessions, and the administration and communication around the event. Only the pre-reading marginally did not meet the target set.

Although the content of exercises reached the target set, several delegates remarked that there were not enough practical sessions and that they expected to approach the exercises more individually.

Communication and motivation

Almost one third of respondents (29 per cent) had heard about the event from a mailing. A quarter had heard about the event from a colleague, manager, or partner organisation.

The primary motivation for people to attend was because of professional interest in digital preservation and interest in Planets' approach to the issues and the relevance of these issues to their day-to-day work. Several delegates are writing preservation plans and wanted to learn more about what Planets has to offer, and to network with others and meet peers working on digital preservation.

Speakers

About one quarter of respondents (26 per cent) did not give a rating to an individual speaker. Of the remaining responses, in all cases, the highest average rating was either 'good' or 'excellent'. Evaluation of sessions and speakers is documented separately in the Feedback Summary Speakers which is confidential to speakers and Planets event organisers. Qualitative feedback on the speakers was minimal, with isolated comments about them talking too quickly and not keeping to time.

Qualitative feedback

Liked best

Respondents were asked what they liked best about the event. Sixty comments were received. A third of these comments were about the speakers and sessions, mentioning the variety of experienced speakers, and their inclusiveness, excitement and enthusiasm. Six specifically mentioned the organisation of the event, with lunch and the professional management of the event being cited. Almost half of all comments said that the introduction to digital preservation and the

overview of Planets were the best part of the event. The “colour, depth and clarity of join-up on Planets”, and “interesting” sessions providing an overview and thorough introduction to the “progressive” approach to Planets tools and services. Seven of these comments referred to the practical exercises and hands-on approach to the sessions. Eight welcomed the opportunity to network and meet other respondents and speakers, and to see other organisations sharing the same issues.

Done better

Respondents were asked what we could have done better. Thirty two comments were received. These can be grouped into three categories: the practical exercises and structure of the event; content of sessions and exercises; and the venue and administrative arrangements. Twelve comments were about the venue and organisation of the event, with the lack of places available for the second part of the event being mentioned by a couple of delegates. Two respondents remarked that the chairs were uncomfortable, with another suggesting that the chairs should have had writing tables. Nine respondents thought that the content could have been better, with almost all comments asking for more practical sessions. Having smaller groups to get hands-on experiences, and individual logon accounts for PLATO were suggested, particularly as most delegates had brought a laptop with them. However, one delegate felt particularly strongly that giving wi-fi access to delegates had a detrimental effect on the sessions, being distracting. In terms of structure, five delegates wanted more case studies, particularly from institutions which are using Planets. Other suggestions were to make the days shorter, as a lot was crammed in, and to provide print-outs of presentations up-front to make note taking easier.

Would like to see covered

Other things that respondents would like to have seen covered were, for example, a wider spectrum of file formats (2 respondents), more on emulation, and fuller demonstrations of XCL, the extractor & comparator. Two delegates asked for more emphasis on join-up between components in the Planets suite. Specific to day one, two delegates asked for demonstrations and/or a practical hand-on session. Many delegates staying on for the other days also wanted more practical, hands on use of tools. Other suggestions were for demonstrations of how Planets integrates with OAIS systems and EDRMs, and more about the interoperability framework. Requests were made for more technical information, more time to work with Plato, designated communities within Planets, and some examples of working through tools workflow. Other ideas were for a separate developer's event, to be able to share email details of other delegates, and for the event to cover environmental considerations with regard to storage possibilities and costs.

Summary and recommendations

The event was well-attended by audiences targeted by the project and indicated that there is high interest in Planets tools and services. Feedback indicated that the event worked well in providing an introduction to issues and challenges associated with preserving digital content and Planets. The event met delegates' expectations and needs overall. For those delegates who attended all three days it met, or almost, achieved targets against all criteria. Almost three-quarters would consider using Planets in their organisation.

Some areas fell short and should be reviewed when planning the final event. Specifically:

- The quantitative and qualitative feedback tells us that delegates find demos, case studies and exercises very useful. Future events could usefully include more of these and real-life examples.
- There was a generally positive view of the exercises. However consideration could be given to having smaller groups, and for delegates to be able to use their own laptops rather than sharing the workshop leader's machine.
- A number of delegates mentioned that they were not aware of pre-reading. This should be clearly communicated. The demand for printed presentations to be available at the event for note-taking could be taken into consideration for future events.

- Some delegates left the event feeling that they did not have a good grasp of the different approaches to digital preservation. Perhaps the different approaches could be explained early on during the first day.
- Relatively few delegates felt that they had adequate opportunity to engage in discussion about the issues, although as the programme is already tightly packed, it is hard to see where these might be included.

Appendix E. Rome evaluation report



Digital Preservation – The Planets Way
Pontificia Università Gregoriana, Rome, Italy
19-21 April 2010

Event evaluation

Planets presented a three day Outreach and Training Event: Digital Preservation – The Planets Way at the Pontificia Università Gregoriana, Rome, Italy on 19-21 April 2010.

Day 1 presented the case for preserving digital content as a risk management activity and the challenges of digital preservation as well as the Planets tools and services. There was also a presentation of how Planets is being implemented at the National Library of the Netherlands.

Days two and three aimed to provide basic practical experience of working with Planets. They offered a digital preservation scenario for developing a preservation plan, experience with the Testbed and in-depth information on preservation action tools including characterisation tools. Day two also provided an overview of the progress of digital preservation in Italy from Rosella Caffo of the Italian Ministry of Culture and Giovanni Bergamin from the Biblioteca Nazionale Centrale Firenze.

The event aimed to stimulate delegates' interest in Planets and equip them with information, skills and examples that will help them and their organisations to implement the outputs of the project.

Due to circumstances beyond our control (the eruption of the Icelandic volcano which affected air travel across Europe), only fourteen of thirty-seven registered delegates attended day one and ten of thirty registered delegates attended days two and three.

The delegates had the opportunity to participate in a conference dinner on the evening of the first day of the event. The speakers and two delegates took part in the dinner.

Seventy-nine per cent (eleven delegates) of the fourteen delegates on day one and eighty per cent (eight delegates) of the ten delegates attending days two and three completed the feedback form. Appendix 1 contains the feedback form and Appendix 2 the event Evaluation Plan.

Success criteria

Day one aimed to give delegates:

- 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 organisation is 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

Days two and three aimed to give delegates:

- Practical skills to start planning the preservation of 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

Respondents were asked to mark performance against the core objectives, with 1 corresponding to 'poor' and 5 to 'excellent'.

The targets for the event were:

- Attendance by fifty or more delegates for day one (max. seventy delegates)
- Attendance by thirty or more delegates on days two and three (max. forty delegates)
- Seventy per cent of attendees rate the event as good or better at achieving objectives set
- Seventy per cent of attendees rate components of event design as good or better.

Attendance

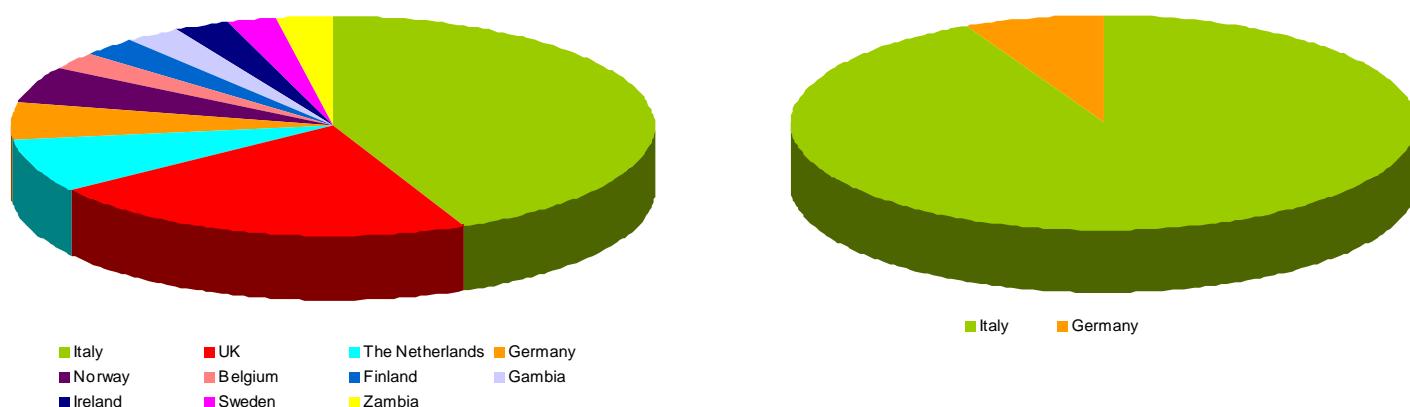
There was a low attendance rate. Thirty-seven delegates registered for day one, which did not meet the set target of fifty delegates. However, thirty delegates registered for all three days, meeting the target.

Due to the travel disruption, only four delegates attended day one and ten attended all three days.

Audience by geographical region

This was the final event in a series of five. The geographical focus of the event was Southern Europe, specifically: Albania, Andorra, Bosnia-Herzegovina*, Croatia*, Greece, Italy, Macedonia, Malta, Monaco, Montenegro, Portugal, San Marino, Serbia*, Slovenia*, Spain, Turkey (* indicates that the targeted country has also been included in a previous event).

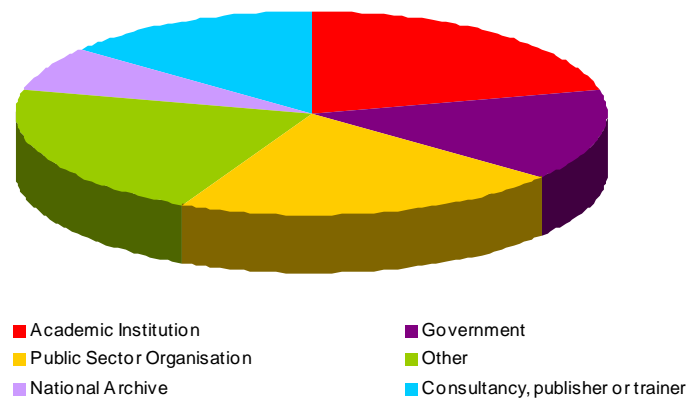
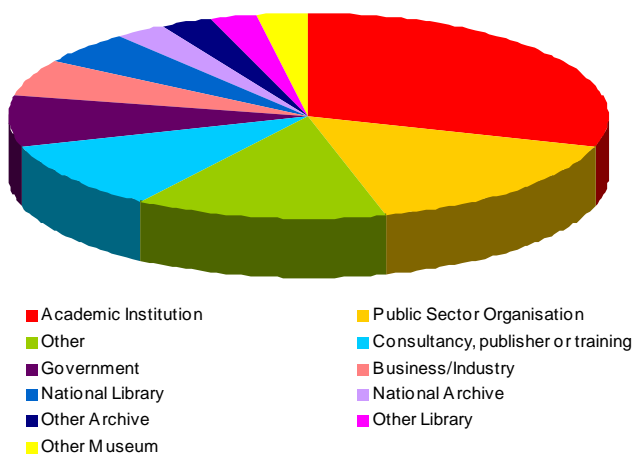
Forty three per cent (sixteen delegates) of registered delegates came from these targeted countries. Ninety three per cent (thirteen delegates) of delegates that attended came from the targeted countries.



Audience composition by institution type

The event was targeted at National Libraries, National Archives and other major content-holders. Twenty eight per cent of all registered delegates represented Academic Institutions, five per cent National Libraries and three per cent National Archives.

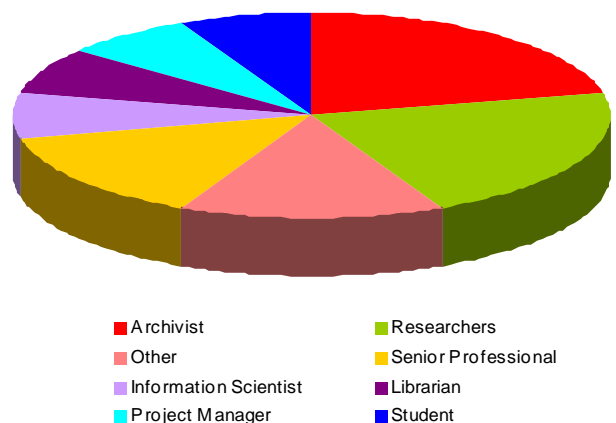
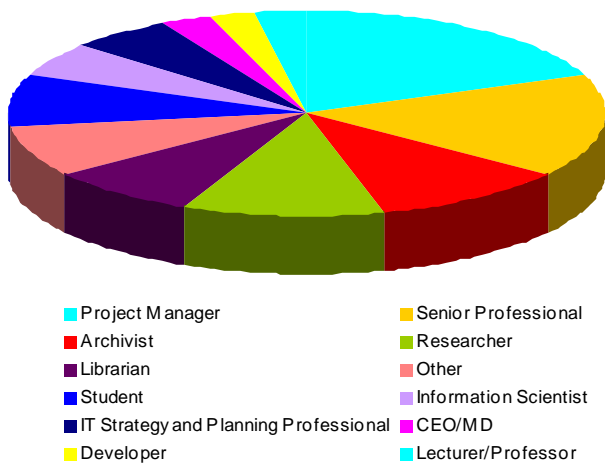
Of those fourteen delegates that attended, three (twenty-one per cent) were from Academic Institutions, three from Public Sector Organisations and three from Government organisations.



Audience composition by occupation

Day one of the event aimed to attract senior personnel (CEOs, Heads of IT, Curatorial and Preservation functions) as well as technical preservation, curatorial and IT staff. Days two and three were targeted more specifically at digital preservation staff (e.g. librarians, archivists, digital librarians and archivists, repository managers, software developers, policy managers etc).

As the delegates that attended were significantly fewer than expected, with, for example, only four day one delegates attending, the data below shows the composition by occupation across the whole event from those who registered and those who actually attended.



At-a-glance

The following tables summarise respondents' feedback against each objective. The row labelled 'Actual' indicates the percentage of delegates who rated the event as 'good' or 'excellent'. The 'Variation' row indicates the difference between the actual and target scores. Negative values are shown in red. All delegates received the same feedback form. This data is based on eleven feedback forms that were returned, which is a much smaller sample than from previous events.

Some questions on the form were not applicable to day one only delegates and any responses received were discounted. The areas in blue apply to all delegates and the un-shaded areas to delegates also attending days two and three.

Attendees were also asked to complete a pre-questionnaire three weeks before the event. This is contained in Appendix 3. The responses are summarised in Appendix 4. Respondents could also mark individual sessions and speakers. This has been analysed in a separate document which is confidential to those involved in planning and delivering the training.

Event Criteria (totals for all delegates)

(per cent)	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Discussion, share ideas etc	Practical skills	Understanding of Planets in different organisations	Ask questions, input	Met expectations	Would consider using	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70	70
Actual	91	91	55	73	75	75	100	100	100	91	100
Variation	21	21	-15	3	8	5	30	30	30	21	30

On both day one and all days the event met expectations. One respondent cited it was not applicable. Respondents rated the event highly in providing them with an understanding of issues and an introduction to Planets. Their understanding of how Planets could fit into their organisation and the opportunity to ask questions and provide input also received high scores. The majority (ten delegates) would consider using Planets and all delegates would attend similar events in future. The event was less effective at demonstrating real examples of approaches to digital preservation; just over half of the delegates rated this as 'good' or 'very good'.

Organisational Targets (totals for all delegates)

(per cent)	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	91	90	100	80	91	73	82	90	82
Variation	21	20	30	10	21	3	12	20	12

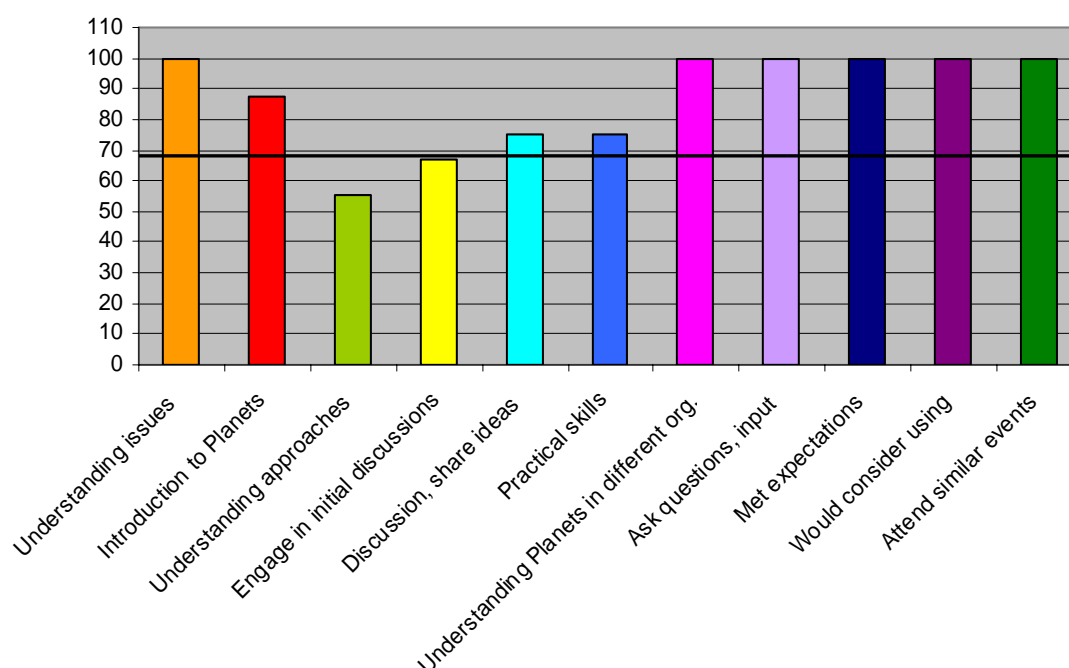
All organisational targets exceeded the target of seventy per cent. Planets speakers continued to score highly across all three days. All delegates rated the content of the exercises as 'good' or 'very good' at this event, whereas this has been identified as an area for improvement from previous event feedback. This could reflect the fact that the break-out groups were far smaller than at previous events, so delegates were able to gain more 'hands-on' experience with the tools. The pre-reading material was also rated highly.

About the event

The table shows a summary of responses by respondents who attended all three days.

Event criteria

(per cent)	Understanding issues	Introduction to Planets	Understanding approaches	Engage in discussions etc.	Discussion, share ideas etc	Practical skills	Understanding of Planets in different organisations	Ask questions, input	Met expectations	Would consider using	Attend similar events
Target	70	70	70	70	70	70	70	70	70	70	70
Actual	100	88	56	67	75	75	100	100	100	100	100
Variation	30	18	-14	-3	5	5	30	30	30	30	30



Most aspects scored highly. However, 'understanding approaches in using Planets in different organisations' fell short at fifty-six per cent and engaging in initial discussions was marginally below the target at sixty-seven per cent.

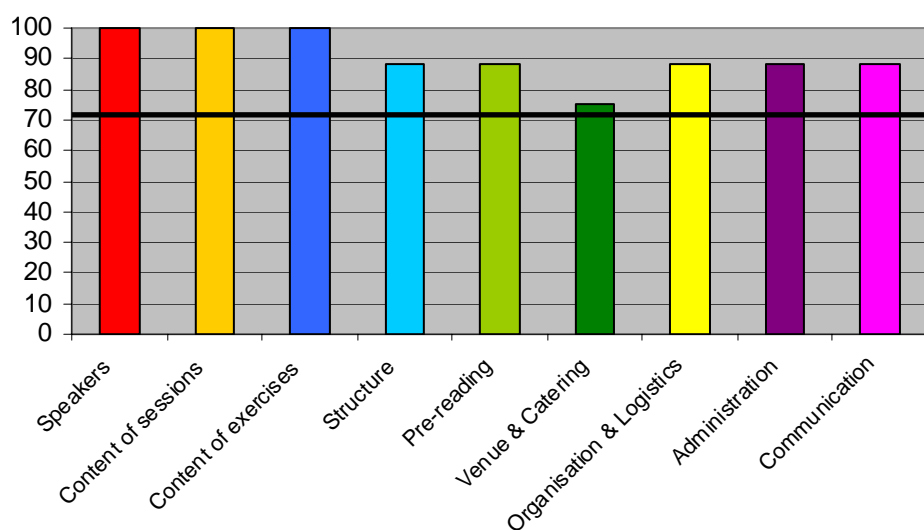
All eight respondents said that the event had met their expectations, they would consider using Planets in their organisation and they would attend similar events.

Organisational targets

All respondents rated all criteria as 'good' or 'excellent' and the scores exceeded the target of seventy per cent.

All-days respondents:

(per cent)	Speakers	Content of sessions	Content of exercises	Structure	Pre-reading	Venue and catering	Organisation and logistics	Administration	Communication
Target	70	70	70	70	70	70	70	70	70
Actual	100	100	100	88	88	75	88	88	88
Variation	30	30	30	18	18	5	18	18	18



Although the content of exercises exceeded the target set, several delegates commented that they would have liked more practical exercises throughout the conference, or more time on the experiments.

Communication and motivation

Ten of the thirty-seven registered delegates cited where they had heard about the event. They all cited that they had heard about the event from a mailing list or a digital preservation community / project website.

The pre-questionnaire indicated that delegates hoped to gain a greater understanding and awareness of the issues of digital preservation. One indicated they were interested in the management side; creating a digital preservation plan and balancing costs, quality, time and risks.

Qualitative feedback

Liked best

Respondents were asked what they liked best about the event. Ten comments were received. Two referred to the event as 'perfect' and 'worked perfectly', five highlighted the practical exercises as the part they liked the best. One delegate commented that although they were sorry that the volcano had prevented so many people from coming, they found the smaller groups worked well. The clarity of the presentations, the speakers and the real life scenarios of the tools being applied were also highlighted.

Done better

Respondents were asked what we could have done better. Five comments were received. One suggested that laptops should be mandatory. One commented that the audio-visual equipment and microphones were problematic on the first day and that the food could be better. There was a suggestion to invite people from other projects to compare different solutions and another suggested using one case study of the duration of the course with ongoing applicable practical exercises. There was a second comment about wanting more time for practical exercises. One commented positively that nothing could be improved.

Would like to see covered

Seven respondents provided comments on what they would have liked to have seen covered. One suggested business models for partners outside of OPF. Two commented that they would like to have had more practical exercises. One cited that Planets should be more actively promoted in Italy and other European countries and that future events could have simultaneous translation. One suggested there could be more covered about Planets and there was another positive comment from a day one delegate who was satisfied with their experience of the conference as it stood.

Summary and recommendations

The event was more difficult to fill than the previous ones in the series, reflecting the lower awareness of digital preservation in southern Europe. Just under half of registered delegates were from the targeted countries, although this increased to thirteen of the fourteen that attended because of the travel difficulties.

Although there was a much smaller sample size of the feedback results, with only eleven forms being submitted, the results still follow trends from the previous events. Feedback indicated that the event worked well in providing an introduction to issues and challenges associated with preserving digital content and Planets. The organisational aspects were also scored highly. The event met all respondents' expectations and needs overall. All respondents would consider using Planets in their organisation and would attend similar events.

Some areas fell short and should be reviewed by the OPF for future events. Specifically:

- The quantitative and qualitative feedback tells us that delegates find demos, case studies and exercises very useful. Future events could usefully include more of these and real-life examples.
- There was a positive view of the exercises. The small groups showed an increased score for the practical exercises and one delegate specifically mentioned that they found the small groups beneficial. However, delegates still cited that they would have liked more exercises overall. Consideration could be given to having significantly smaller groups, and for delegates to be able to use their own laptops rather than sharing the workshop leader's machine.
- Some delegates left the event feeling that they did not have a good grasp of the different approaches to digital preservation. Perhaps the different approaches could be explained early on during the first day.
- Relatively few delegates felt that they had adequate opportunity to engage in discussion about the issues, although as the programme is already tightly packed, it is hard to see where these might be included.

Appendix 1 – Feedback Form

Appendix 2 – Evaluation Plan

Appendix 3 - Pre-questionnaire

Appendix 4 - Results of pre-questionnaire

APPENDIX 1



Digital Preservation – The Planets Way

Pontificia Università Gregoriana, Rome
19-21 April 2010

Feedback Form

Please 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 one only
☐ Attended all three days

About You

What type of organisation do you work for?

- ☐ National Library ☐ Consultancy, publisher or training

- | | |
|---|---|
| <input type="checkbox"/> Other Library | <input type="checkbox"/> Systems developer |
| <input type="checkbox"/> National Archive | <input type="checkbox"/> Repository provider |
| <input type="checkbox"/> Other Archive | <input type="checkbox"/> Vendor or software developer |
| <input type="checkbox"/> National Museum | |
| <input type="checkbox"/> Other Museum | |
| <input type="checkbox"/> Academic Institution | |
| <input type="checkbox"/> Government | |
| <input type="checkbox"/> Public Sector Organisation | |
| <input type="checkbox"/> Business/industry | |
| <input type="checkbox"/> Media | |

What is your function?

* Please specify e.g., CEO, librarian, digital archivist, software developer, researcher etc.:

Name (optional): _____

(Please note that your name will only be used for entry into the prize draw.)

Event Evaluation

Please rate your response to the following (where **1** is 'strongly disagree' and **5** is 'strongly agree'):

All delegates:

The event has given me . . .	1	2	3	4	5
1. An understanding of why to preserve digital content and the issues associated with preservation planning, policy and strategy setting and executing preservation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. An introduction to the preservation planning cycle, Planets framework, technology, tools and service and what they have to offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. An understanding of the way some organisations approach preservation of digital content by using Planets tools and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. An opportunity to engage in initial discussions about digital preservation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Days two and three attendees only:

The event has given me . . .	1	2	3	4	5
------------------------------	---	---	---	---	---

- | | | | | | |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 5. An opportunity to engage in discussion, share ideas and best practice and to establish contacts in organisations with a need to preserve digital content | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Practical skills to plan preservation of digital content and to use Planets tools and services | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. An understanding of how Planets may fit into my organisation's digital preservation policy and activities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. An opportunity to ask questions and provide input into further developments of Planets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

General comments:

11. The event has met my expectations ☐ Yes ☐ No

If not, why not? . . .

12. I would consider using Planets in my organisation ☐ Yes ☐ No

If not, why not? . . .

13. I would expect to attend similar events in the future ☐ Yes ☐ No

If not, why not? . . .

Event Organisation

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

	1	2	3	4	5
1. Speakers (<i>for the sessions cf. pages 5 to 7</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Content of the sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Content of the exercises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Structure and pacing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- | | | | | | |
|------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 5. Pre-reading and documents | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Venue and catering | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Organisation/logistics | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Administration | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Communication | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Your comments:

What did you like best about the event?

What in your opinion was missing in the conference?

What could we have done better?

Getting involved...

If you would like to receive more information about Planets, please register to join our Planets user community at: www.planets-project.eu/community. This is the quickest and easiest

way to receive information about the latest developments in the project. You can unsubscribe at any time.

Thank you for supporting Planets!

Please turn the page to evaluate specific speaker sessions...

Day 1 – Speakers and Sessions

Please rate the following speaker sessions (where 1 is poor and 5 is excellent)

	1	2	3	4	5
Introduction to Digital Preservation: Why Preserve? Ross King, Austrian Institute of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Preservation Action Cycle: Introduction to Planets Clive Billenness, British Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introduction to Preservation Planning Hans Hofman, National Archives of The Netherlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Preservation: How to preserve Sara van Bussel, The National Library of the Netherlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tools: How to understand files Manfred Thaller, University at Cologne	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Preservation: How to verify? Edith Michaeler, The Austrian National Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Preservation: How to Plan Hannes Kulovits, Vienna University of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tools: How to integrate the Components of Digital Preservation Ross King, Austrian Institute of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case study: How The National Library of the Netherlands is preserving digital content Barbara Sierman, The National Library of The Netherlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further remarks on day 1:

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Day 2 – Speakers and Sessions

Please rate the following speaker sessions (where 1 is poor and 5 is excellent)

	1	2	3	4	5
Case study 2: Preservation projects at the Italian memory institutions Rossella Caffo, Italian Ministry of Culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation Planning with Planets Hannes Kulovits & Mark Guttenbrunner, Vienna University of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Characterisation of Digital Content Manfred Thaller, University at Cologne	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation Actions Sara van Bussel, The National Library of the Netherlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Benchmarking Preservation Tools: the Testbed Environment Edith Michaeler, The Austrian National Library & Matthew Barr, HATII at the University of Glasgow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further remarks on day 2:

Day 3 – Speakers and Sessions

Please rate the following speaker sessions (where 1 is poor and 5 is excellent)

	1	2	3	4	5
Preservation Actions – Preserving Databases Amir Bernstein, Swiss Federal Archives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completing a Preservation Plan Hannes Kulovits & Mark Guttenbrunner, Vienna University of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing the Testbed Environment Edith Michaeler, The Austrian National Library & Matthew Barr, HATII at the University of Glasgow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Pulling it all together: Implementing Digital
Preservation using the Planets Interoperability
Framework**

Clive Billenness, British Library



Further remarks on day 3:

Digital Preservation – The Planets Way

Pontificia Università Gregoriana, Rome, Italy
19-21 April 2010

Event Evaluation and Measurement Plan

Planets will host the final in the series of five Outreach and Training Events: 'Digital Preservation – The Planets Way' at the Pontificia Università Gregoriana, Rome on 19-21 April 2010. The geographical focus of the event is Southern Europe, specifically: Albania, Andorra, Bosnia-Herzegovina*, Croatia*, Greece, Italy, Macedonia, Malta, Monaco, Montenegro, Portugal, San Marino, Serbia*, Slovenia*, Spain, Turkey (* indicates that the targeted country has also been included in a previous event).

This three-day event aims to attract between 50 and 60 registered delegates on day one and between 30 and 40 registered delegates on days two and three.

Day 1 will present the case for preserving digital content as a risk management activity, the challenges of digital preservation as well as the Planets tools and services. There will also be a presentation of how Planets is being implemented at the National Library of the Netherlands.

Days two and three will provide basic practical experience of working with Planets. They will offer a digital preservation scenario for developing a preservation plan, experience with the Testbed and in-depth information on preservation action tools including characterisation tools. Day two will also provide an overview of the progress of digital preservation in Italy from Rosella Caffo of the Italian Ministry of Culture.

The content level will be adjusted to meet the needs of the target audience. The event is structured to provide delegates with information as well as initial practical experience with Planets tools and services.

Objectives

Delegates participating in day one of the event should gain:

- An understanding of the need to preserve digital content and the risk management issues involved
- An introduction to the preservation planning cycle, the Planets framework, tools and services
- The advantages / usability of the Planets project outputs
- An insight into work on digital preservation in practical terms (i.e. through two case studies)
- An opportunity to engage in initial discussion on digital preservation

Delegates participating in all three days of the event should **also** obtain:

- First practical experience with Planets tools and services (e.g. Plato preservation planning tool)
- An understanding of Planets' potential contribution to their organisation
- An opportunity to receive information about and provide input to Planets
- An opportunity to engage in discussion and to exchange ideas and best practice about digital preservation

Why evaluate?

Evaluation of the event will identify:

- How far the event has met the objectives set

- The progress of achieving the Planets outreach events' aims
- How to improve the structure or content of any future training events run by the Planets follow-on organisation
- Feedback on the project.

Targets and Measures

The targets for the event are:

1. Attendance:

- 50 to 60 delegates registered for day one (max. 70 delegates)
- 30 to 40 delegates registered on each of days two and three (max. 40 delegates)

2. Content, structure and organisation:

The delegates will be asked to complete a feedback form based on the objectives of the event. They will be asked to rate the event on a scale of 1 to 5 (1 being poor and 5 excellent) against the following criteria:

- Event value for the participants
- Event organisation (venue, logistics, booking, preparatory documentation etc.)
- Understanding of the Planets project outputs and their usability
- Quality of presentations
- Networking opportunities

The target is to achieve a minimum of 70% rating for the above-mentioned success criteria.

The feedback form will also allow delegates to evaluate individual sessions. These results will be used in turn to inform speakers about their performance as a preparation for their sessions in the upcoming Planets outreach events.

Communication

The Evaluation Report will be disseminated among organisers and speakers within Planets. It will be available to project management.

APPENDIX 3**Digital Preservation - The Planets Way****Pre-event questionnaire**

We kindly ask you to fill out this questionnaire as part of the preparations for the event 'Digital Preservation – The Planets Way' in Rome on 19-21 April 2010.

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!

1. Name and affiliation (optional)**2. What type of organisation do you work for?****3. What is your function?**

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

4. Is your institution involved in any other program, initiative or project dealing with digital preservation?**5. Would you/your institution be interested in taking part in further initiatives in digital long-term preservation?**

(If yes, please specify)

6. Does your organisation have a digital preservation policy?**7. If yes: Is the policy reviewed:****8. Does your organisation have a budget for digital preservation?****9. Does digital preservation feature in your:****10. Please describe your interests in the long-term management of digital information:**

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

12. What types of digital information require long-term management in your organisation?

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

14. How much digital information do you store / expect to store...

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

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

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

APPENDIX 4

Online pre-event questionnaire for Rome event (22 answers)

About you and your organisation

1. Name and affiliation (optional)

See list of participants

2. What type of organisation do you work for?

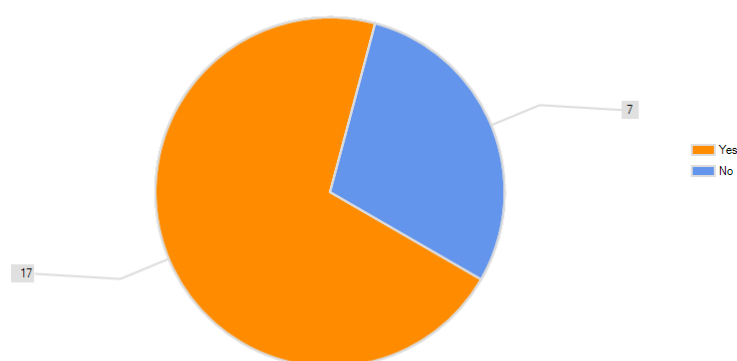
See audience composition.

3. What is your function?

See audience composition.

4.

Is your institution involved in any other program, initiative or project dealing with digital preservation?



Delegates who responded 'yes' to this question mentioned:

locksss, clockss, portico

SOIMA course on the conservation of digital heritage

Europeana

eSciDoc project,
Alliance for Permanent Access to the Records of Science (APA),
PARSE.Insight,
German Astrophysical Virtual Observatory (GAVO),
DARIAH,
nestor

InterPARES Team Italy

parliamentary acts

KEEP

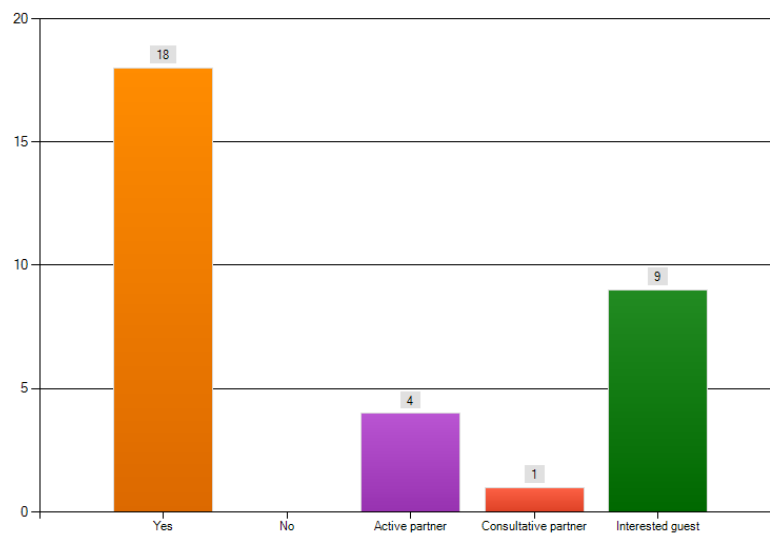
WE HAVE TWO BIDS FOR DIGITISATION IN THE PIPELINE.

European projects and national initiatives

PrestoPRIME

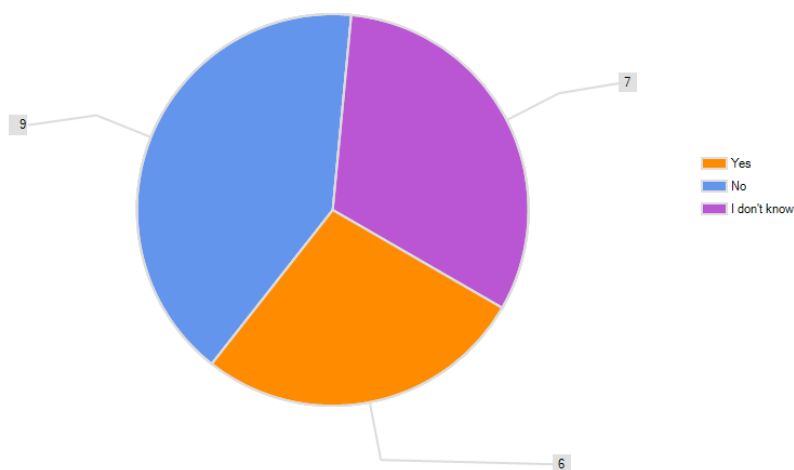
5.

Would you/your institution be interested in taking part in further initiatives in digital long-term preservation?(If yes, please specify)

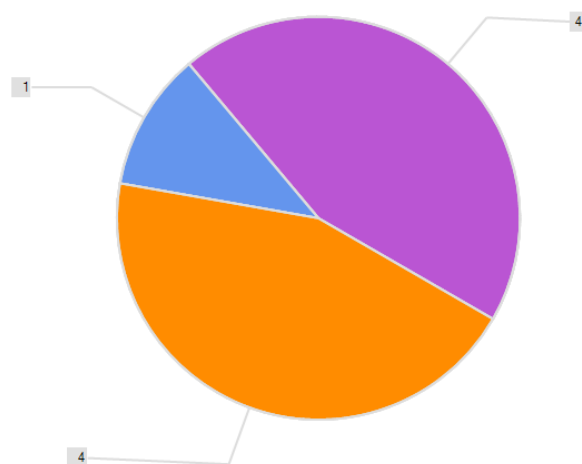
About digital preservation

6.

Does your organisation have a digital preservation policy?

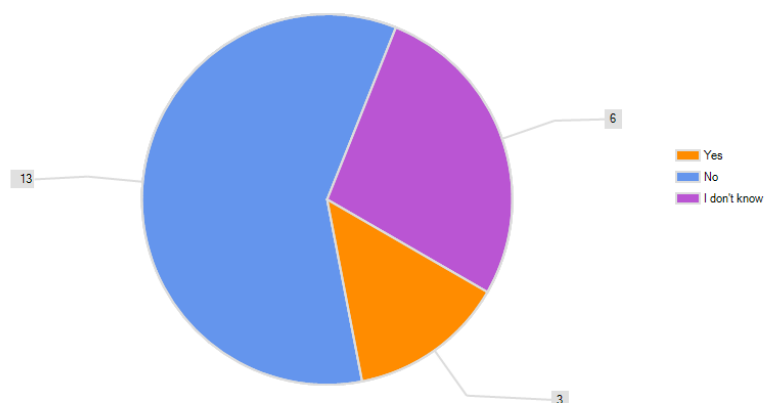


If yes: Is the policy reviewed:



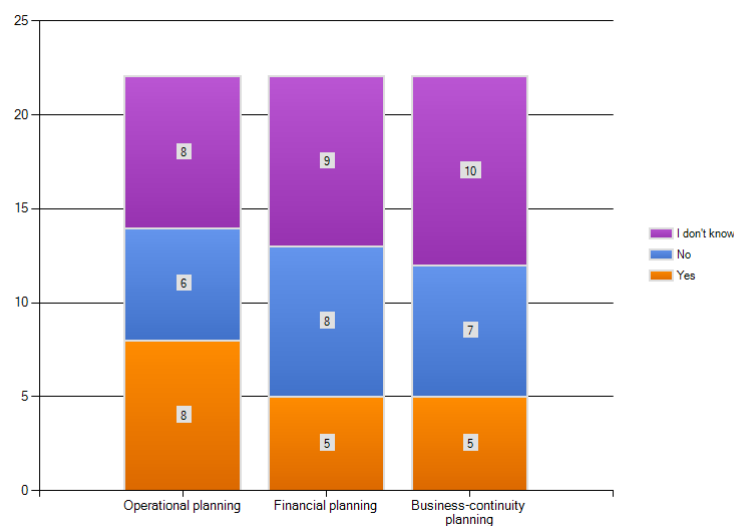
8.

Does your organisation have a budget for digital preservation?



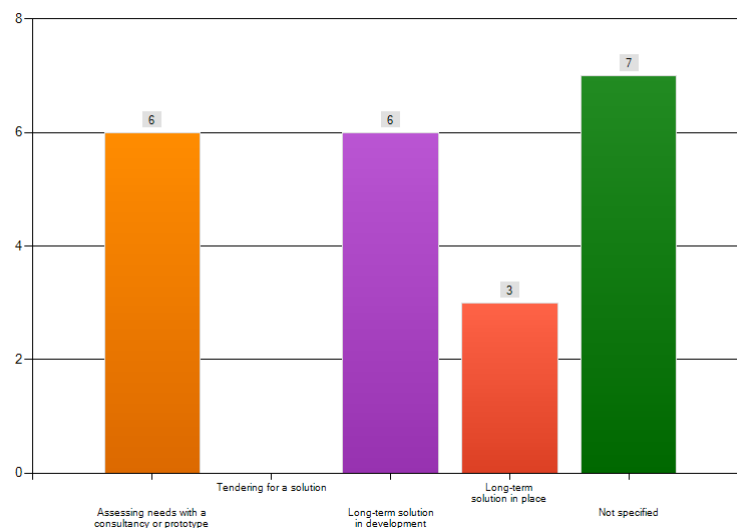
9.

Does digital preservation feature in your:



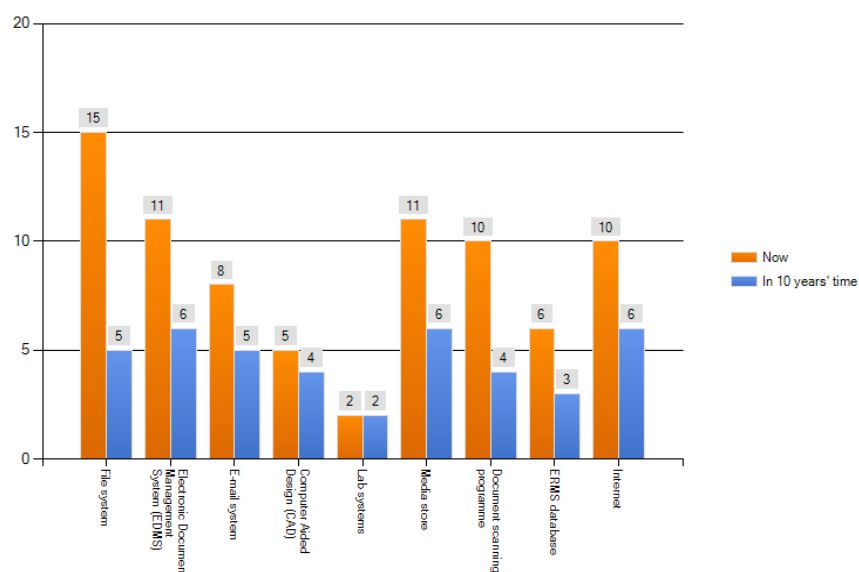
10.

Please describe your interests in the long-term management of digital information:



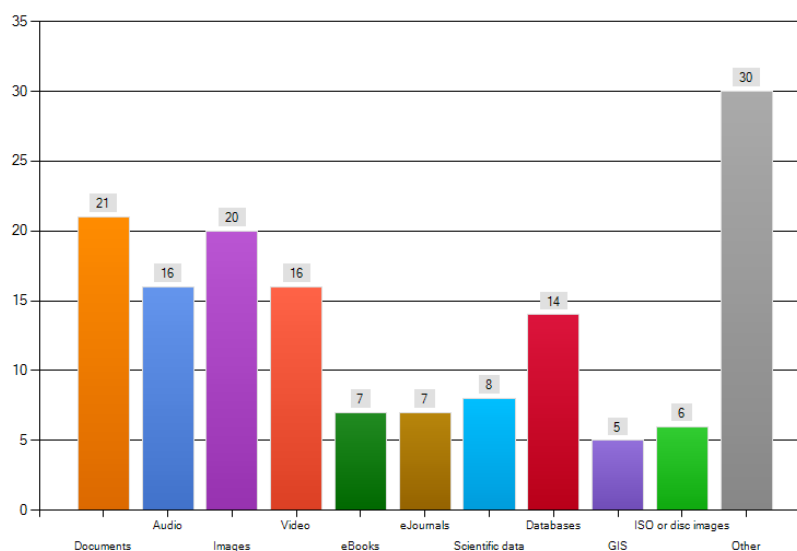
11.

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



12.

What types of digital information require long-term management in your organisation?
(Select all that apply)



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

To become even more diverse

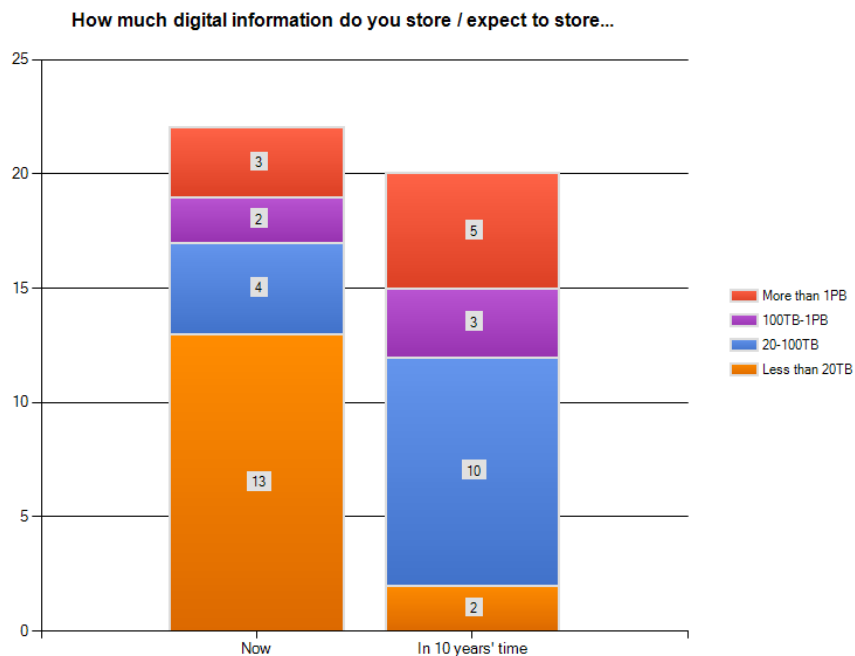
MORE ARCHIVAL MANAGEMENT REQUIRED

I hope there is a Preservation policy which is working and controlled

Adopt best possible digital preservation options.

Further expansion to websites, GIS and software.

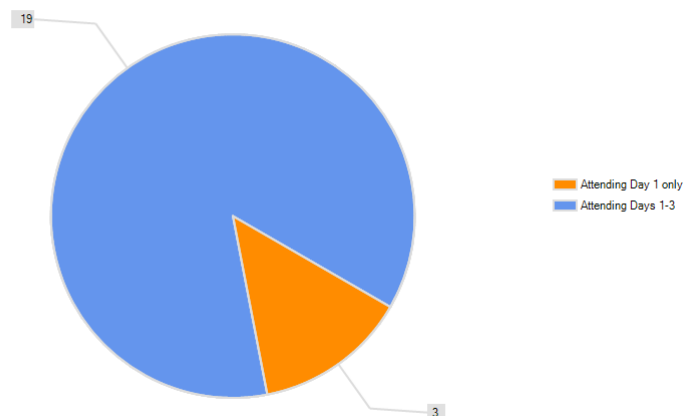
14.



About the training

15.

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



16. I would like to get the following from the training:

Training in the new way of digital preservation

Sustainable methodologies for long-term preservation of digital records, including databases

knowledge regarding technical environment metadata

A BETTER UNDERSTANDING OF THE CURRENT LEVEL OF DIGITISATION AND THE DIFFERENT OPTIONS AVAILABLE

Preservation planning steps, case studies, Plato

Ideas for setting up an organisational DP policy. Not very interested in available practical tools, rather in best management approaches, how to create internal support, how to balance costs, quality, time and risks. What does a DP plan deals with.

I am specifically interested in DP of audiovisual media. Also: DP of personal and UGC and how that impacts DP strategies of custodial institutions.

PS We will store 15 PBs of material in 2 yrs.

The most recent issues on Digital Preservation

I would like to know more about digital preservation and get awareness of what we can do to implement a serious digital preservation plan.

Practical ways of dealing with digital preservation of digital text, images and Audio or Video where possible.

Possibilities to use te Planets software in the repository we currently develop.

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

No thanks

No

As our Institution is very small, i would prefer a sort of outsourcing solution. We need someone to help us with this important issue.

I am very expectant and hope I will learn how to use PLANETS tools to carry out digital preservation.

We are currently working with web sites only and are involved in the collection, ingest and maintenance of web resources in a repository. I want to achieve maximum automation throughout the whole process like automatic collection, adding/updating metadata, making the whole web resource harvestable and good storage (bits wise) for long term digital preservation.

Appendix F. Sample feedback form



Digital Preservation – The Planets Way

Swiss Federal Archives, Bern
17-19 November 2009

Feedback Form

Please 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?

- What type of organisation do you work for?
- | | | | |
|--------------------------|----------------------------|--------------------------|------------------------------------|
| <input type="checkbox"/> | National Library | <input type="checkbox"/> | Consultancy, publisher or training |
| <input type="checkbox"/> | Other Library | <input type="checkbox"/> | Systems developer |
| <input type="checkbox"/> | National Archive | <input type="checkbox"/> | Repository provider |
| <input type="checkbox"/> | Other Archive | <input type="checkbox"/> | Vendor or software developer |
| <input type="checkbox"/> | National Museum | | |
| <input type="checkbox"/> | Other Museum | | |
| <input type="checkbox"/> | Academic Institution | | |
| <input type="checkbox"/> | Government | | |
| <input type="checkbox"/> | Public Sector Organisation | | |
| <input type="checkbox"/> | Business/industry | | |
| <input type="checkbox"/> | Media | | |

What is your function?

* Please specify e.g., CEO, librarian, digital archivist, software developer, researcher etc.:

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Event Evaluation

Please rate your response to the following (where 1 is 'strongly disagree' and 5 is 'strongly agree'):

All delegates:

The event has given me . . .	1	2	3	4	5
1. An understanding of why to preserve digital content and the issues associated with preservation planning, policy and strategy setting and executing preservation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. An introduction to the preservation planning cycle, Planets framework, technology, tools and service and what they have to offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. An understanding of the way some organisations approach preservation of digital content by using Planets tools and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. An opportunity to engage in initial discussions about digital preservation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Days 2 and 3 attendees only

The event has given me . . .	1	2	3	4	5
5. An opportunity to engage in discussion, share ideas and best practice and to establish contacts in organisations with a need to preserve digital content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Practical Skills to plan preservation of digital content and to use Planets tools and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. An understanding of how Planets may fit into my organisation's digital preservation policy and activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. An opportunity to ask questions and provide input into further developments of Planets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General comments:

11. The event has met my expectations ☐ Yes ☐ No

If not, why not? . . .

12. I would consider using Planets in my organisation ☐ Yes ☐ No

If not, why not? . . .

13. I would expect to attend similar events in the future ☐ Yes ☐ No

If not, why not? . . .

Event Organisation

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

	1	2	3	4	5
1. Speakers (<i>for the sessions cf. pages 5 to 7</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Content of the sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Content of the exercises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Structure and pacing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Pre-reading and documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Venue and catering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Organisation/Logistics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Your comments:

What did you like best about the event?

What in your opinion was missing in the conference?

What could we have done better?

Getting involved...

If you would like to receive more information about Planets, please register to your Planets user community at: www.planets-project.eu/community. This is the quickest and easiest way to receive information about the latest developments in the project. You can unsubscribe at any time.

Thank you for supporting Planets!

Please turn the page to evaluate specific speaker sessions...

Day 1 – Speakers and Sessions

Please rate the following speaker sessions (where 1 is poor and 5 is excellent)

	1	2	3	4	5
Introduction to Digital Preservation: Why Preserve? Ross King, Austrian Institute of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Preservation Action Cycle: Introduction to Planets Clive Billenness, British Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Introduction to Preservation Planning Christoph Becker, Vienna University of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Preservation: How to preserve Sara van Bussel, The National Library of the Netherlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tools: How to understand files Jan Schnasse & Volker Heydegger, University at Cologne	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Preservation: How to verify? Edith Michaeler, The Austrian National Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Preservation: How to Plan Christoph Becker & Hannes Kulovits, Vienna University of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tools: How to integrate the Components of Digital Preservation Ross King, Austrian Institute of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case study: Preservation activities at the Bavarian State Library Klaus Kempf, Bavarian State Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further remarks on day 1:

Day 2 – Speakers and Sessions

Please rate the following speaker sessions (where 1 is poor and 5 is excellent)

	1	2	3	4	5
Case study: Digital Preservation at the Swiss Federal Archives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jérémie Leuthold, Marguérite Bos & Urs Meyer					
Preservation Planning with Planets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hannes Kulovits & Christoph Becker, Vienna University of Technology					
Characterisation of Digital Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volker Heydegger & Jan Schnasse, University at Cologne					
Preservation Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sara van Bussel, The National Library of the Netherlands					
Benchmarking Preservation Tools: the Testbed Environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edith Michaeler, The Austrian National Library & Matthew Barr, HATII at the University of Glasgow					

Further remarks on day 2:

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Day 3 – Speakers and Sessions

Please rate the following speaker sessions (where 1 is poor and 5 is excellent)

	1	2	3	4	5
Preservation Actions – Preserving Databases Amir Bernstein, Swiss Federal Archives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completing a Preservation Plan Hannes Kulovits & Christoph Becker, Vienna University of Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experiencing the Testbed Environment Edith Michaeler, The Austrian National Library & Matthew Barr, HATII at the University of Glasgow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pulling it all together: Implementing Digital Preservation using the Planets Interoperability Framework Clive Billenness, British Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Further remarks on day 3:

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