

Training methodology

Effective training tools application to qualification improvement in library sector (ETQI)

Project special purpose

The project will transfer best practice regarding the knowledge of library and information science and competencies of information technology in library management to the National Library of Latvia and the National Library Lithuania. Training methodology is specifically concentrating on Library and information science training course.

Content

This methodology is to be used as recommendations for **training provider, teaching staff** of project participants. These guidelines are not meant for learners or target group of librarians.

The best practice and expertise of project partners are included in methodology description for each module, and includes defined Learning outcomes. This document will provide information of project documents of training organization, processes and continuation.

The overall goal of the syllabus

To provide knowledge of innovative work of libraries in the countries with a well-developed library practice. The main goal introduces the time limit for the usefulness of the produced training material. In the cases when it relates to technological innovation this time limit may be quite short.

Therefore, the developers should include the instructions to the local trainers on the periods of the material updates and indicate possible sources for current information on the subject of the module as far as it is possible.

The major application area should be the work of a national library, but also provisions for the strategic leadership for other library networks in Latvia and Lithuania should be made. *Digital collection development and Information*

resource management modules are targeting only national libraries in their specific legal and organizational environments.

Note: specific expectations for each module are found in a separate section.

The overall structure of the training material

The developers outline the goal and the learning outcomes or the competences to be developed in the module on the basis of the cross-map of the competences (see the form for the general competences cross-mapping as Appendix 1) and provide them in the form for a separate module (Appendix 2). The competences should be mainly subject specific, but some may be generic, however, due to the duration of the modules not more than 3-4 overall per module. The developer can introduce additional competences to a specific module that are not included in the cross-map.

Each module should cover 40 hours of a trainees time, including the lectures, hands-on exercises, seminars and/or workshops, reading time, self-assessment and assessment tasks. Part of this time (approximately 30-50% of time) is spent with a trainer and the rest is devoted to individual work. The developer of the training material decides how much time is spent with a trainer and what tasks the trainer should perform.

The module package includes instructions for the local trainers and the design requirements for the staff mounting training materials on the Moodle platform.

The scope of the module

40 training hours equal to 1,5 credit point in Swedish universities. Thus the amount of time for each task could be assessed according to the norms applied at SSLIS (that are derived from the ECTS calculation recommendations), namely:

Lecture – the duration of the lecture (filmed one according to the duration of the recording, written one – estimated by the amount of teaching material for one academic hour, which is decided by the teacher developing the module).

Seminar, practicum, or workshop (usually under the trainers control) – according to the classroom time + time required for preparation (decided by the teacher on the basis of preparatory material and the complexity of the task).

Reading time – 6 pages per 1 hour (as recommended in ECTS calculations) (This means that the amount of reading should be quite limited).

Independent task (including learning, training, self-assessment and examination tasks) – calculated by the teacher according to the complexity and nature of the task.

Examination task and assessment criteria are designed by the developer of the training material and included in the package.

Trainees in the modules

The staff of the national libraries requested to be admitted to the module with regard to the level of initial preparation. The modules target professional librarians who have higher education or have acquired professional knowledge through prolonged practice in libraries. There should not be any division of the trainees into groups according to the previous practice or education.

When developing the module material, the developer should indicate the prerequisite knowledge necessary for taking the module. The level of the trainees is controlled by the staff of the Training Centres in The National Library of Latvia and Lithuania.

Trainers for the modules

The trainers for the modules are recruited from the staff of the national libraries and some of them are trained by the developers of the teaching material on site or on distance. The selection of the trainers is done by the national libraries. The teachers and the national libraries agree which trainers need to be trained on the site, which should receive online instructions, and which will only get the training instructions written by the module developer.

The instructions to the trainers are a part of the module material. They should recommend the tasks that the trainees in the module undertake under the supervision of the trainer and provide concise but clear description of the training steps and procedures that the trainer should perform.

Legal issues for digital libraries

The course requires the participant to read specific papers and other documents, to complete exercises, and to complete a major assignment. The tasks should be not only useful for the student to integrate information and develop personal knowledge of legal issues, but also to be of potential benefit to the organization either directly, or through increasing the individual's ability to make decisions as a legally competent employee.

The exercises and the assignment are designed for individual completion, but there is no reason why they should not be undertaken by small groups (the exercise on environmental scanning recommends working in groups), if the participants find it appropriate.

The overall aim of the course is to introduce the participants to some key ideas from information management and to encourage them to think about whether these ideas would be useful to the organization and how they might be implemented. Your role in the course, therefore, is to interact with the participants to support and encourage these aims and to their learning. This includes:

Encourage the participants to introduce themselves on the learning platform (unless everyone already knows each other) (c. 30 minutes).

Set up places for discussion for each unit and explain that contribution to the online discussions is a part of the learning process as well as a criteria for assessment. Monitor discussions on the learning platform and respond to questions if there are any, either by answering yourself or by encouraging the participants to help each.

At appropriate points in the course, encourage the participants to declare on the learning platform what they have chosen to carry out the exercises on (e.g., which of their tasks they have chosen in the copyright and licensins topic), and what they have decided to do for the final seminar.

Arrange and moderate the seminar (or webinar) in module 1. Make sure each participant presents his or her observations as required and also contributes to the discussion of the other participants' presentations (c. 2 hours, excl. preparation time).

Instruct the participants to submit their written major assignment through the learning platform at a given deadline in due time before the seminar. After

submission, draw up a schedule for the seminar where each participant is allotted equal time for presentation and discussion

Arrange and moderate the seminar (or webinar) for the major assignment. Make sure each participant briefly presents his or her recommendations as required and also contributes to the discussion of the other participants' presentations (c. 3 hours, excl. preparation time)

Assess the course:

- monitor participation in the seminars and online discussions;
- assess the major assignment and provide brief comments to the author (c. 1 hour per assignment)

Unit 1

Contact the participants to introduce yourself and to set a time by which they should have logged on to the learning platform and introduced themselves. Your main function in this unit is to monitor discussions, encourage participation by inviting those who have not contributed to do so, and to answer any questions. Read the assigned course literature and familiarize yourself with some of the recommended literature. Reviewing the exercise yourself will help you answer queries from the participants.

Seminar 1

In this unit, you will also need to set a time when all participants can take part in the seminar. You can guide the seminar using the questions provided, or you can develop questions that you may think more appropriate in the light of comments made earlier in the module discussions.

For the final 20 minutes or so of the seminar initiate a general discussion on the types of laws and legal responsibilities of the libraries in which the participants work, with particular reference to how understanding of legal issues and monitoring legislative initiatives might support public service activities.

Unit 2

By the time this unit is reached participants should be comfortable with using the learning platform, but it may be useful to check on whether anyone is experiencing problems and to seek to resolve them.

Major assignment

Declare at the start of the course that the Major Assignment is to be written within the second unit (unless you choose to change the sequence of units and have the second one at the end).

Make sure there is a discussion thread on the platform where the participants declare their chosen topic and where they can post questions and comments and ask the help from each other.

Seminar 2

Your role is to lead the seminar for sharing the outcomes of the major assignment and monitor the discussions, help to answer questions and generally moderate what is going on. It may be useful to generate discussion topics yourself from your reading of the recommended literature, e.g., Which of the copyright issues is thought to be of most significance for the institutions concerned? How to find effective arguments and attract the attention of legislators to the neglected balance of interests in the drafts of the laws?

Decide whether or not you as a trainer will assess the assignments before, during or after the seminar. Also decide if you want the participants to have a look at some or all of the other participants' assignments before the seminar, thus paving the way for a peer commenting schedule (that may depend on the size of the group at a time). Depending on which, set a *submission deadline* that provides you and the participants with reasonable time to read the assignments before the seminar.

Decide on a suitable maximum length of the presentations, which do not have to be formal as most of the participants should have read the recommendations in advance. Still, it could be useful to get the authors comments on the basis of the recommendations. A suggested time length for the whole seminar in this work book is three hours, but this can vary depending on the number of participants, the format of the seminar, and the time available.

The seminar will primarily be a presentation of the participants' suggestion for realistic (but still fictional, of course) recommendations to the library. Their work should be as realistic as possible. Allow for comments in relation to each participant, but make sure to keep the time so that everyone can get comments. All comments should be oriented towards helping the participants to understand the controversies and implications of the recommendations for the library users and the staff. Note active participation for assessment purposes. Deliver your feedback and assessment either orally during the seminar or in writing after the seminar.

Unit 3

Your main involvement, as in the preceding units is to read the recommended literature and monitor the contributions to discussion on the learning platform. Identify non-contributors and encourage them to participate. Answer any questions that are raised.

Unit 4

This unit does not require a written assignment. It is examined through the presentation of a controversial situation in a library that presents a dilemma and a difficult choice for librarians. The most important part in this concluding seminar is an overall discussion to see the laws as instruments of power that can be negotiated even in the most difficult situations. Try to draw on the experience of the participants, their professional ethics and sense of justice as citizens.

Make a schedule of presentations of the situations and ample time for their discussion. This seminar presents a risk as the participants may avoid discussion as irrelevant for their practice or pure fiction. You may have to find real life arguments to prove them that these issues are important from several points of view. Thus, you should prepare for this seminar quite seriously and have some extra material if the situations of the participants are not convincing. Try to reach some common conclusion by the end of the seminar.

Final assessment

Assessing the seminars. Monitor participation in the seminar and assess the value of comments made.

Assessing online discussions. Keep track of the activity and input from the module participants.

Assessing the major assignment. The assignment should be assessed in terms of how far it meets the specification set out in the description above. Has the writer selected a useful area for recommendations? Are the recommendations to the library plausible and capable of implementation?

Decide what is the minimal level of participation to get a pass for the module before the start of the training and announce it to the course participants from the beginning.

How to update the material

The suggested educational resources should not age rapidly and it is unlikely, in the immediate future, that significant new developments will take place that necessitate a completely new approach to the legal issues in libraries. However, you may want to augment the educational materials with the sources from your own country. Keeping an eye on developments and changes in your own legislation and monitoring the news through Google or another search engine should be enough to remain abreast of developments.

If updating does become necessary, the key qualities needed for supporting literature for the course is that it should be generic in character, dealing with the topic as a whole, rather than research literature on specialised aspects, and that it should use visualisation, as in PowerPoint presentations wherever

possible, to clarify the relationships among concepts. The Website Slideshare (<http://www.slideshare.net/>) may be useful, together with the Website of AIIM (<http://www.aiim.org/>).

Preparations for trainers

Prepare before the start of the course by reviewing the required reading, and some of the suggested additional reading and/or videos. Review the exercises and think about what can be expected of the participants.

Familiarize yourself with the learning platform so you can navigate it with ease and know what it contains, specifically how to upload and download material, and how to post in discussions and edit the contents. See if you are content with the prepared discussion threads for the course on the platform, or if you can foresee the need for additional threads and topics.

As soon as you have the list of participants determine their affiliation and, where possible, job role, so that you have an understanding of the background to the issues they may raise. Use the initial session to get to know the participants.

Read a little more widely than the indicated material to give yourself a wider knowledge of the field.

Develop a module evaluation questionnaire online seeking students opinions on the usefulness of provided readings and other materials, on the complexity of tasks, balance between different activities, trainers role and the overall impact on the competence of the participants. Use the feedback critically in updating the course material when necessary.

Instructions for course designers

All participants should have access to all content from the beginning of their enrolment in the course.

The page structure of the learning site should follow the structure laid out above, i.e.:

Introduction [including Learning Outcomes and Course overview]

Unit 1:

Unit 2:

Unit 3:

Unit 4:

Course and recommended literature – copied from the individual modules on to a separate page

Course assessment

Course evaluation

Also, the following should be included:

A discussion forum for participants and trainer, including these discussion threads [if possible, the trainer should also be able to add new threads]:

- General course issues
- Unit 1
- Unit 2
- Unit 3
- Unit 4
- The major assignment

A possibility for participants to share documents with each other

A place for participants to upload their major assignments

If the course is offered with webinars, participants need access to a video conferencing system with the possibility of displaying documents (e.g. PowerPoint presentations).

The URLs for the learning resources should be made into links to the external sites, and opened in a new tab or window

After completing the course, the participant will be able to

Learning outcomes	
Knowledge	Skills
...critically assess the implications of laws and legal regulations of library networks, copyright and liability for library work	
Be familiar with the main concepts of library related laws and be able to explain how libraries are influenced and influencing the legislation in crucial areas.	Demonstrate the ability to analyse the present situation of legal regulations related to the libraries. Identify the allies for cooperation in lobby activity and the partners who can help in implementing the existing regulations.
...display an understanding of the value of legislation privileging information use through libraries and relate it to the contractual agreements (licencing) and conditions.	
Explain the relations between the legally acknowledged library rights and duties and possible legal barriers for their execution.	Analyse licencing agreements from the perspective of exemptions for libraries existing in international and national legislation and argue the case of library service.
...display a capability of building the case of library lobby related to various situations.	
Explain the role of library lobby for the provision of legal access to information through libraries and other organizations.	Analyse legal possibilities and mechanisms available for expanding the provision of information services. Argue the value of increased information provision to the public in legal terms.

Building digital collections

An educational idea behind the design of the course is that an important way in which participants learn is with and from each other. A key element is therefore interaction between the participants around the course topics. The course also includes self-studies in the form of reading/viewing educational content and preparing assignments. The assignments are designed to let participants come in contact with and use various relevant texts and practices in different countries.

Your role in the course is primarily to interact with the participants in order to support and assess their learning. This includes the following:

- moderate the seminars (or webinars): support the participants' learning (c. 11-13 hours, excl. preparation time)
- encourage the participants to introduce themselves on the learning platform (unless everyone already knows each other) (c. 30 minutes)
- answer questions and monitor discussions on the learning platform (the group can decide on voluntary discussions) (time depends on amount of questions and discussions)
- assess the course in the following ways:
 - keep track of active participation in the seminars
 - assess the exercise (c. 15 minutes/exercise)
 - assess the paper and provide brief comments to the author (c. 1 hour/paper)

Unit 1

Initiate the course by presenting yourself and inviting the participants to introduce themselves briefly on the learning platform.

The trainer's main involvement in this module is to lead the discussion seminar. Familiarize yourself well with the legislation and library regarding building, maintenance and management of digital collections in national libraries of the country of participants. Prepare yourself for the work studying international recommendations by IFLA and UNESCO and the EC policies and guidelines related to digital legal deposit and collections of digital cultural heritage.

Seminar 1: discussion seminar

Begin by letting the group decide how they will document their discussion.

Make sure that everyone gets a chance to be active in the discussion.

Contribute your own knowledge to a reasonable extent and help the group summarize and draw conclusions based on their discussion. If the group has

participants from more than one country, find a suitable solution that will allow the situation in both countries to be covered, either by dividing the group into two or more sub-seminars, or by making time for discussing all countries involved. Let the group participants from different countries compare their findings and analyse the reasons for possible differences in developments in the countries. Note active participation for assessment purposes.

Unit 2

At the beginning of module 2, let the group discuss in a learning platform discussion thread which research areas they will choose to focus on and strive to get them to select a broad mix of areas. Though it relates to one case study, this study covers a broad array of issues related to digital web archive and other digital collections.

Decide beforehand on how long the presentations can be, depending on the time available and the number of participants, and inform the participants. If the group is too large, perhaps dividing them into two seminars could be an option.

Seminar 2: presentation seminar

Begin by letting the participants present their findings, and help them to keep the time agreed on. Allow time for any clarifications necessary in relation to each presentation. For the last 30-60 minutes, moderate a discussion on similarities and differences in the participants' findings (i.e. between library practices related to various document types, in different countries, etc.) and the discussion items provided. Help the participants make links to the educational content and the groups' previous discussions where relevant. Note active participation for assessment purposes.

Optional discussion thread

If you and (most importantly) the group have an interest in it, discuss the standpoints and priorities presented in the case study of PANDORA. This could serve to further engage the group in joint discussion in a way where the individual can decide how much time they would like to invest. Of course, discussion threads can be used for voluntary discussions of other topics as well, as the group sees fit.

Unit 3

Create a discussion forum for uploading of the exercise results and an additional discussion thread for supporting discussions. Decide beforehand on how much time you will allow the participants for discussions depending on the time available and the number of participants, and inform the participants. If the group is too large, perhaps dividing them into two discussion forums could be an option.

The aim of discussions is to help the participants to identify the issues and elements in the literature that explain the main problems of building digital deposit collections and that they can use for their exercise. Another aim is to help them to select objects for exercise. Encourage participants to express

their opinions and uncertainties, keep an eye on the emerging problems and help the participants to avoid the bottlenecks.

Exercise presentation.

Provide the participants with a deadline for submitting the results of the exercise. Allow some time for reading the submissions of others and providing critical feedback. Depending on the number of participants you may need to assign who will comment which submissions. Assign two to four exercise presentations to one person – encourage the participants to analyse the submissions in depth and critically. Assess the quality of submissions (understanding of the problem, imagination, logic of assessment of resources, clarity of presentation) and participation of the participants for assessment purposes.

Unit 4

This module contains a written assignment – creation of access policy. Create a discussion forum or a task submission space for uploading of the individual policies and an additional discussion thread for supporting discussions. Decide beforehand on how much time you will allow the participants for discussions depending on the time available and the number of participants, and inform the participants.

The aim of discussions is to help the participants to identify the issues and elements in the literature that explain the main problems of access to digital deposit collections and that they can use for the development of policies.

Another aim is to help them to select objects for policy development.

Encourage participants to express their opinions and uncertainties, keep an eye on the emerging problems and help the participants to avoid the bottlenecks.

Access policy development written assignment

Provide the participants with a deadline for submitting the results of their work. Let the group to decide if they want to discuss the policies in a seminar (webinar) or provide online feedback.

Allow some time for reading the submissions of others and providing critical feedback. Depending on the number of participants you may need to assign who will comment which submissions. Assign no more than two policies to one person – encourage the participants to analyse the submissions in depth and critically. If a group is a small one, several participants may read the same policy. Ask the participants to compare the policies they read with their own submission. The critical assessments (critiques) should be uploaded on the discussion forum or special site. Make sure that all the authors see the feedback of their course-mates to their policy. Assess the quality of submissions (understanding of the problem, imagination, logic of policy structure, clarity of presentation) and participation of the participants for assessment purposes.

If the group wants to discuss the policies in the seminar, follow the same preparation as before the uploading of critiques, but instead of written critiques assess the participation in discussions. You may discuss each submitted policy in turn. That would be the simplest structure for seminar discussions. Keep notes of participation activity and the quality of critiques.

Assessment

The assessment of the course as a whole should be based on the learning outcomes and the assessment criteria.

Seminars: Keep track of participation and activity in the seminars. The seminars should be assessed on the basis of the first two learning outcomes.

Exercise: Check that the exercise is presented in full and the calculations seem plausible. You do not need to check every detail. Feedback will be provided in the discussions, by you and peers. The second and partially third outcome should be reached in this exercise.

Paper: Assess the policy paper based on the assessment criteria. Language and every piece of information or every argument do not need to be entirely without flaw in order for the paper to be acceptable, but the paper as a whole should show that the author has grasped the main content, and it should not contain too obvious misunderstandings or outrageous proposals. If this is the case, so that the paper does not reach the level of a Pass, the author should be allowed to revise the paper. Try to provide at least some comments to each author, pointing out interesting approaches or solutions as well as any problematic suggestions. This task focuses on the third learning outcome, but also includes knowledge and skills already reached as the first and second ones.

Each part of the assessment is graded with a Pass or a Fail, and the participant needs to reach a Pass on each part in order to receive a Pass on the course as a whole.

How to update the material

The course is based partly on content that should be relevant for the foreseeable future, and partly on content that is likely to become less important with developments over time. The trainer should keep track of major changes in the law, practice and library work that are happening in influential countries such as the UK, France, Germany, the Nordic and Central European countries, and especially in their own countries.

The web sites of national libraries may be useful in keeping up-to-date and updating the course content. You may choose the ones that are described in the workbook, but also the ones that are relevant from the perspective of your country.

International Internet Preservation Consortium, <http://netpreserve.org/legal-deposit>

Digital legal deposit documents on UNESCO site, <http://en.unesco.org/> (use search box)

Keep an eye on IFLA publications through: <http://www.ifla.org/>

Preparations for trainers

If you do not have extensive experience in the area, read the basic literature provided above. Familiarize yourself with the policies recommended by international organizations and with the practices of the most advanced national libraries (British Library, National Library of France, Australian National Library). Also familiarize yourself with the issues of legal deposit and legal solutions affecting the implementation of national digital or web archives and providing access to them.

Instructions for course designers

I would suggest that the introduction, the text about each module, and a few other texts are made into separate pages on the learning platform. This would result in the following pages:

- Introduction to the course [which includes Learning Outcomes]
- Unit overview
- Unit 1: Types of digital collections in national libraries
- Unit 2: Collections of a national digital archive
- Unit 3: Methods of material acquisition for national digital archive collections
- Unit 4: Managing access to digital collections
- Course literature and resources [all references could, in addition to being included in each module, be gathered on this separate page]
- Course assessment
- Course evaluation [assuming there is a standard for evaluating the courses – an evaluation has not been provided in this package]

Furthermore, the following could be included as documents in a document folder:

- Course paper by Kathryn Gronsbell
- Case study by Maria Garasa.

Also, the following should be included:

- Discussion forums for participants and trainer [if possible, the trainer should also be able to add new threads]
- A possibility for participants to share documents with each other
- A place for participants to upload their paper and exercise to the trainer

If the course is offered with webinars, participants need access to a video conferencing system with the possibility of displaying documents (e.g. PowerPoint presentations).

It would be advantageous if the URL:s are made into links to the external sites, and opened in a new tab or window. NB! Even though all the external educational content is available online free of charge in some version, most of it is covered by copyright restrictions. I have archived webpages to WebCite where possible to provide permanent access. The same can be done when new material is included. Translations of webpages into languages relevant for the participants can be added if necessary.

All participants should have access to all the content from the beginning.

Learning outcomes

After completing the course, the participant will be able to

Learning Outcomes	
Knowledge	Skills
...identify a demand and plan digital collections in a national library	
Explain and relate the impact of a national library functions on specific features of its digital collections. Explain who the users of these collections are.	Formulate statements for the policies of national libraries in the development of the digital collections
...display an understanding of various aspects and types of digital materials and the consequences on these aspects for the development and access to digital collections	
Explain how differences of digital materials affect collection development policies	Analyze and draw conclusions how different types of digital materials will affect the policies and, as a result, the users and their access to digital collections.
...analyse methods of digital collection building from the perspective of different interested parties	
Get understanding and describe different methods of building digital collections and how these depend and/or affect different group interests.	Select and implement different methods and tools of digital material acquisition and collection building for different digital collections; assess the costs related to their implementation

Digitizing Projects

An educational idea behind the design of the course is to combine individual readings, case studies (the exercises) and an experimental assignment (OCR) in order to help the course participant make practical use of all this impetus in the form of an overall and concrete Digitization Plan, which hopefully will be of use not only to him or her individually, but also to the institution where he or she works. Ideally, the Digitization Plan can be further used and referred to in other courses as well, for instance M1, M4 and M7. Both the assignments and both the exercises are designed as individual tasks. However, if you (and the participants) see fit, they can equally well be performed as group tasks. If you decide for this, state this already at (or before) the start of the course, and declare to the participants that each group member's contribution in the group assignments must be possible to identify clearly and individually in order to be assessed.

The most important learning outcome for the participants is to understand the delicate balance between the quality of the input and what quality one will expect from the output. This should become evident in their Digitization Plans. You should not assess these Plans in the sense that a high-quality project necessarily deserves better merit than a project that is less ambitious. A high-quality ambitious digitization project (and plan) is not necessarily "better" than a small-scale, quick-and-dirty project with a low degree of technical implementation or manual hands-on labour. It depends on the needs of the material, the digitizing institution, and the presumed user groups. Some users might e.g. only be interested in having access to roughly scanned images of the material to be able to decide whether or not they will be able to find what they are after by travelling to the library housing the source documents, other user groups will need to have fully TEI encoded and proof-read text transcriptions with high resolution image scans side by side. Some projects will be more experimental in nature, testing a particular technology, software or method, and where e.g. long-term maintenance and archiving of the digitized material might be of less importance. The participant should demonstrate in the Digitization Plan how the proposed project aims to manage this balance between input, available resources, and expected output and value.

As for the technical parts in module 2, the primary aim should not be that the participants must demonstrate a high degree of technical skill, that is not the purpose. Module 2 and its assignment is only meant as an example of how technology can be implemented, what benefits and risks are involved, and - again - how there is an intrinsic balance between on the one hand the efforts you put down in the input and editing phase and on the other hand the value

and use you can expect from the digitized material. In the assignment, the ability to recognize problems is more valuable than to achieve software performance "success". Also, there might be cases where OCR and text encoding are not very good options, due to e.g. the characteristics of the source material (such as hand-written letters or text that is illegible) or the resources and skills of the digitizing institution, and it is good if the discussion seminar picks up on such issues as well.

The major assignment, the Digitization Plan, is to be written *in parallel* to modules 1-3. This means the participants should get started on the Plan already early in the course, and the work is to be intensified towards the end of the course. Be very clear about this to the participants. A particular discussion thread on the ongoing work with the Plan is highly recommended and should be monitored throughout the course by you as trainer. This should not mean that you take on the role as "supervisor" for each Digitization Plan. Rather, encourage the participants to ask questions, make suggestions, and help *each other* in the Digitization Plan thread - each participant is likely to come across the same kinds of ideas and questions as other participants, and they are therefore in a good position to help each other.

Your role in the course is to interact with the participants in order to support and assess their learning. This includes the following:

- Encourage the participants to introduce themselves on the learning platform (unless everyone already knows each other) (c. 30 minutes)
- Monitor possible discussions on the learning platform and care to questions if there are any, either be answering yourself or by encouraging the participants to help each other (the group can decide on voluntary discussions) (time depends on amount of questions and discussions)
- Encourage the participants to declare on the learning platform what projects they have chosen to study in the two exercises (module 1 and 3) and what observations they have made (this is not required, but feedback from other participants on this will help them go through with the exercises and thus will support them in writing the Digitization Plan) (c. 30 minutes)
- Encourage the participants to declare on the learning platform what documents or collections they have chosen for their Digitization Plan, make sure there is a thread for this topic, and where they can pose questions, comments, and follow-up during their work with the Plan. (this is not required, but feedback from other participants on this will help them produce the Digitization Plan) (c. 30 minutes)
- Arrange and moderate the seminar (or webinar) in module 2. Make sure each participant presents his or her observations as required and also contributes to the discussion of the other participants' presentations (c. 2 hours, excl. preparation time)

- Instruct the participants to submit their written major assignment, the Digitization Plan (or a link to it), through the learning platform at a given deadline in due time before the seminar. After submission, draw up a schedule for the seminar where each Plan is allotted equal time for presentation and discussion. If you see the need, the participants can be assigned special commentator tasks to each others' Plans. If so, you can specify this in the schedule. (c. 30 minutes)
- Arrange and moderate the seminar (or webinar) for the major assignment, the Digitization Plan. Make sure each participant briefly presents his or her observations as required and also contributes to the discussion of the other participants' presentations (c. 3 hours, excl. preparation time)
- Assess the course:
 - keep track of active participation in the seminars
 - assess the major assignment and provide brief comments to the author (c. 1 hour/Plan)

Module 1

Initiate the course by presenting yourself and inviting the participants to introduce themselves briefly on the learning platform.

The trainer's main involvement in this module is to monitor possible discussions and answer questions if there are any. Read the assigned course literature and listen to the recorded lecture. Familiarize yourself with some of the recommended literature, such as the guidelines and either Terras' book or the book by Bülow & Ahmon. Doing the exercise yourself (studying two cases of digitization projects) will be helpful in order to help the participants and to answer questions.

Module 2

At the beginning of module 2, make sure there is a learning platform discussion thread on both the module 2 and the minor assignment on OCR. The participants are likely to come across (and are indeed encouraged to focus on) several problems, ranging from small and trivial (how do I download this or that, can I use this book scan instead of the prepared scans, where can I get access to this or that software, etc), to tricky technical and processual problems (why is my output from software X in partly unreadable text, why doesn't this file format work in software Y, etc). They will likely need to ask and discuss these matters with each other on the platform, and it is only beneficial to all if they are able to initiate such discussions even before the seminar.

Go through the required reading and the recorded lecture. Familiarize yourself with the proposed OCR software, download the scans and perform the OCR procedure yourself to learn about the successes and failures the participants are likely to come across. You must certainly not aspire to attain an expert

level on OCR and encoding, but are encouraged to explore this field at the level of the participants, which will help you engage in the seminar and assess their contributions: are their observations and questions "reasonable" and logical?

Decide beforehand on your planned schedule for the seminar and what is expected of the participants. Remind them that they do not need to submit anything before the seminar, but are only required to bring their observations of questions, problems and possible solutions to the seminar, present and discuss these at the seminar and engage in the discussion of the other participants' presentations. Also, be aware that although pre-prepared scans are provided, the work book instructions open up for the possibility for participants to work with their own book scans instead. If so, ask them to check this with you early on - the material they choose instead must offer some degree of difficulty similar to the Fraktur etc in the provided scans. OCR'ing scans of printed books in plain Roman text in clear resolution will probably offer the software little problems if at all, and so there will be little to discuss in the seminar.

Seminar

Begin by pointing to the proposed schedule, and then let the participants present their findings (and also what material they have worked with, in case they chose a different material than the prepared scans), and help them to keep the time agreed upon. Note active participation for assessment purposes. Let them know by the end of the seminar or after the seminar whether or not they have passed the assignment.

The instructions in the work book provide some questions that the participants can address during the seminar. There are even further discussions that might arise during the seminar:

- What happens with the OCR if an image is skewed (e.g. leaning, distorted)? Why?
- How does advanced layout on a page affect the OCR result? Why?
- How do old forms and variants of spelling match modern lexicons in the OCR process?
- What might be the obstacles to having OCR interpret material such as old card catalogues? How, do you think, would the OCR of notes compare to that of typewriting?

Prepare for the seminar by thinking about these questions and possible answers to them.

For the final 20 minutes or so of the seminar, initiate and moderate a general discussion on the possibilities and problems of text capture and OCR.

Encourage the participants to draw conclusions about the findings during the seminar and the kinds of material and collections they are working with at the respective work places. Would OCR be a valid option for them and their

material? Would the software they have tested be valid, or does it provide too many shortcomings? In what respects?

Module 3

As in module 1, the trainer's main involvement in this module is to monitor possible discussions and answer questions if there are any. Read the assigned course literature and listen to the recorded lecture.

Doing the exercise yourself (studying the same two cases of digitization projects as in module 1 but with an eye to use and assessment) will be helpful in order to help the participants and to answer questions.

Major assignment: Digitization Plan

Declare already at the start of the course that the Plan is to be written in parallel to the three modules. Make sure there is a discussion thread on the platform where the participants declare their chosen material and where they can post questions and comments and ask the help from each other.

If you see the need, specify the allowed formats and the maximum length of the Plan (the work book instructions are intentionally liberal on this point).

Seminar

For this seminar finalizing the course, the participants are to submit their Plans (through the learning platform) beforehand. Decide whether or not you as trainer will assess the Plans before, during or after the seminar. Also decide if you want the participants to have a look at some or all of the other participants' Plans before the seminar, thus paving the way for a peer commenting schedule. Depending on which, set a *submission deadline* that provides you and the participants with reasonable time to read the Plans before the seminar.

Decide on a suitable maximum length of the presentations. A suggested time length for the whole seminar in this work book is three hours, but this can vary depending on the number of participants, the format of the seminar, and the time available.

The seminar will primarily be a presentation of the participants' suggestion for a realistic (but still fictive, of course) Plan. Although this will be a suggestion and possibly a work in progress, their work should be as realistic as possible according to the available resources declared at the outset of the Plan. Allow for comments in relation to each presentation, but make sure to keep the time so that everyone can get comments. The comments – by the participants and you – should be oriented towards helping the author improve on their Plan. Note active participation for assessment purposes. Deliver your feedback and assessment either orally during the seminar or in writing after the seminar.

Assessment

The assessment of the course as a whole should be based on the learning outcomes and the assignment criteria.

Seminars: Keep track of participation and activity in the seminars

Plan: Assess that the Plan based on the assignment criteria. Language and every piece of information or every argument and every bibliographic reference (if there are any) do not need to be entirely perfect in order for the Plan to be acceptable, but as a whole it should demonstrate that the participant has understood the task, grasped the main contents of the three modules, is able to choose and define a realistic empirical material, suggest strategies, methods and tools for digitizing it, and state the intended purpose(s), outcomes, and user group(s) of the digitization project. Further, the Plan should not contain too obvious misunderstandings of literature, technologies, empirical materials or impossible proposals. If this is the case, so that the Plan does not reach the level of a Pass, the author should be allowed to revise it. Try to provide at least some comments to each author, pointing out interesting approaches or solutions as well as any problematic suggestions.

Both assignments - the minor on OCR and the major as Digitization Plan - are graded with a Pass or a Fail, and the participant needs to reach a Pass on both in order to receive a Pass on the course as a whole.

How to update the material

The course is based partly on content that should be relevant for the foreseeable future, and partly on content that is relevant only as historical or contemporary examples of applied technologies and solutions to particular problems. The needs, problems, solutions and technologies will for sure vary and be different for the participants of the course. If for instance a different software or format for text capture/OCR or text encoding is more relevant for the participants than those exemplified in the course, it would be a wise move to try to accommodate for this by slight modifications to the course content and its examples.

Some web sites that may be useful in keeping up-to-date and updating the course content are:

- Minerva EC <<http://www.minervaeurope.org>>
- Europeana <<http://www.europeana.eu>>
- The Text Encoding Initiative Consortium <<http://www.tei-c.org>>
- The Alliance of Digital Humanities Organizations <<http://adho.org>>
- *TEI by Example* <<http://www.teibyexample.org>>
- w3schools <<http://www.w3schools.com>>

And some useful journals:

- Digital Humanities Quarterly < <http://www.digitalhumanities.org/dhq/>>
- D-Lib Magazine <<http://www.dlib.org>>
- Liber Quarterly <<http://liber.library.uu.nl/index.php/lq>>
- Literary and Linguistic Computing <<http://llc.oxfordjournals.org>> (subscription access).

Preparations for trainers

Prepare before the start of the course by glancing through the required reading, the recorded lectures, and some of the suggested additional readings, such as digitization guidelines.

Take a peek at the exercises and at both the assignments to learn what is expected from the participants (and to some extent, from you)

Familiarize yourself in due time with the learning platform so you can navigate it with ease and know what it contains, specifically how to upload and download material, and how to post in discussions and edit the contents. See if you are content with the prepared discussion threads for the course on the platform, or if you can foresee the need for additional threads and topics.

As soon as you have the list of participants before you, map where they are coming from, see if you can find out their affiliation - are they e.g. housed in libraries, and do you know if these are engaged in finished or ongoing digitization projects? The participants should be encouraged to tell a little about themselves and their particular interests and needs in the discussion forum of the learning platform at the start of the course. Make them describe whether or not they have experience from or are presently engaged in digitization projects or similar. What empirical material are the attendants working with and interested in? What kinds of questions are relevant for them?

If possible, familiarize yourself with cultural heritage digitization infrastructure, initiatives, and history of the country/countries in which the course participants are active as professionals.

Instructions for course designers

The introduction, the text about each module, the instructions for the two assignments, the digitized scans for the minor assignment on OCR, and a few other texts are made into separate pages on the learning platform. This would result in the following pages:

- Introduction [including Learning Outcomes and Course overview]
- Module 1: Digitization, purposes and strategies
- Module 2: Technology: text capture and encoding
- Minor assignment: OCR
- A page providing links to 8 scans to download for the minor assignment
- Module 3: Use and assessment
- Major assignment: Digitization Plan
- Course literature and recommended literature [these are provided for and within each module, but all references could preferably also be collected on a separate page]
- Course assessment
- Course evaluation [assuming there is a standard for evaluating the courses – an evaluation has not been provided in this package]

Also, the following should be included:

- A discussion forum for participants and trainer, including these discussion threads [if possible, the trainer should also be able to add new threads]:
 - General course issues
 - Module 1
 - Module 2
 - Module 3
 - The minor assignment, OCR
 - The major assignment, Digitization Plan
- A possibility for participants to share documents with each other
- A place for participants to upload their major assignments (and possibly exercises) or to provide links to them. Upload formats should be allowed to vary, such as e.g. DOC, ODT, RTF, XLS, PDF, PPT, HTML

If the course is offered with webinars, participants need access to a video conferencing system with the possibility of displaying documents (e.g. PowerPoint presentations).

It would be advantageous if the URL:s are made into links to the external sites, and opened in a new tab or window. NB! Even though all the external educational content (and most of the recommended additional material, too) is available online free of charge in some version, most of it is covered by copyright restrictions.

All participants can have access to all the content from the beginning.

 Lifelong Learning Programme		Effective training tools application to qualification improvement in library sector Digital library professional development syllabus (ETQIL)			
Generic Title of the Module:		ETQI M3 - Digitizing Projects			
ETQIL SQF Level:		7			
ECVET points:		(if applicable)			
ECTS Credits:		1,5			
EQF/NQF Level:		SE	LT	LV	
		6/7 (7)	7 (7)	6/7(5)	
Learning outcomes					
Label of Learning Outcome	Training Module Code	Competence			
		Knowledge		Skills	
Digitizing Projects	M3	... critically analyse specific motives and strategies for digitizing textual documents in library collections			
		Identify common motives for cultural heritage digitization and some general strategies for performing it, on a national and international library level, while also critically reflecting on those motives		Implement critical knowledge of motives in a concrete digitization plan for a particular collection of textual material, according to a strategy that meets the overall purpose of the project and the characteristics of the material	
		...display an understanding of some current technologies for text capture and text encoding and their consequences for successfully performing a sustainable digitization project of textual material			
		Understand the basic procedures of text capture and text encoding in general and of OCR and XML/TEI in particular. Account for some fundamental possibilities and problems of these technologies with respect to different kinds of source material and sustainability		Perform an experimental but simple evaluation assessment of current OCR software and analyse non-trivial consequences and problems with their varying performance rates. Declare proper strategies and levels of text encoding for a specified source material	
		... understand the interdependence between a digitization project's design and the needs of particular user groups for the digitized collection, and to identify various ways of assessing the value of digitized collections for users and research			

		<p>Understand some important ways in which digitized text collections serve the needs of its intended user groups, such as the general public or particular research communities. Identify possible ways to assess the value of a digitization project</p>	<p>Implement this knowledge in a concrete digitization plan for a particular collection of textual material, according to a strategy that meets the needs of specified user groups and stating the use, re-use and research potentials of the digitized material</p>
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User behaviour and information activities

An educational idea behind the design of the course is that an important way in which participants learn is with and from each other. A key element is therefore seminars where the participants interact with each other and with you around the course topics. The course also includes self-studies in the form of reading educational content and preparing assignments. The assignments are designed to let participants come in contact with and use various relevant texts.

Your role in the course is primarily to interact with the participants in order to support and assess their learning. This includes the following:

- moderate the seminars (or webinars): support the participants' learning (c. 11-12 hours, excl. preparation time)
- encourage the participants to introduce themselves on the learning platform (unless everyone already knows each other) (c. 30 minutes)
- answer questions and monitor discussions on the learning platform (the group can decide on voluntary discussions) (time depends on amount of questions and discussions)
- assess the course in the following ways:
 - keep track of active participation in the seminars
 - assess the paper and provide brief comments to the author (c. 1 hour and 15 min/paper)

Module 1

Initiate the course by presenting yourself and inviting the participants to introduce themselves briefly on the learning platform.

The trainer's main involvement in this module is to lead the discussion seminar.

Seminar 1

Make sure that everyone gets a chance to be active in the discussion and that each participant explicitly reflects on at least two of the concepts dealt with. Contribute your own knowledge to a reasonable extent and help the group summarize and draw conclusions based on their discussion. Note active participation for assessment purposes.

Module 2

The trainer's main involvement in this module is to lead the presentation seminar.

Seminar 2

Decide beforehand on how long the presentations can be, depending on the time available and the number of participants, and inform the participants. If the group is too large, perhaps dividing them into two seminars could be an option.

Keep track on each participant so that he or she covers in the presentation the points specified in the instructions: 1) What is the identified problem?; 2) what are the assumed insights to gain; and 3) what method(s) is(are) selected?

Module 3

The trainer's main involvement in this module is to lead the presentation and discussion seminar.

Seminar 3

Decide beforehand on how long the presentations can be, depending on the time available and the number of participants, and inform the participants. Do also assign time in the seminar for a general discussion related to the presentations. If the group is too large, perhaps dividing them into two seminars could be an option. In addition, keep track of questions answered. As a moderator of the discussion, try to remind those participants that have not answered all of the questions originating from the preceding exercise.

Module 4

This module contains one seminar and one par writing-task. The seminar can be seen as a preparation for the paper writing-task. An assumption is that the comments and reflections that will be ventilated in the seminar can be of use when writing a paper. For this reason, it is important that there is a fair amount of time between the seminar and the date for submitting the paper.

Seminar 4

Begin by letting the group decide if, and if so how, they will document their discussion (e.g. by noting the variations and frequency of various suggestions for example scenarios). Make sure that everyone gets a chance to be active in the discussion. Contribute your own knowledge to a reasonable extent and help the group summarize and draw conclusions based on their discussion.

Note active

Assessment

The assessment of the course as a whole should be based on the learning outcomes and the assessment criteria.

Seminars: Keep track of participation and activity in the seminars

Paper: Assess the paper based on the assessment criteria. Language and every piece of information or every argument do not need to be entirely

without flaw in order for the paper to be acceptable, but the paper as a whole should show that the author has grasped the main content, and it should not contain too obvious misunderstandings or outrageous proposals. If this is the case, so that the paper does not reach the level of a Pass, the author should be allowed to revise the paper. Try to provide at least some comments to each author, pointing out interesting approaches or solutions as well as any problematic suggestions.

Each part of the assessment is graded with a Pass or a Fail, and the participant needs to reach a Pass on each part in order to receive a Pass on the course as a whole.

How to update the material

The course is based partly on content that should be relevant for the foreseeable future.

Preparations for trainers

If you do not have extensive experience in the area, read Wilson (2002) and Pilerot (2014), along with the specified educational content above.

Instructions for course designers

I would suggest that the introduction, the text about each module, and a few other texts are made into separate pages on the learning platform. This would result in the following pages:

- Introduction to the course [which includes Learning Outcomes]
- Module overview
- Module 1: Basic concepts in information behaviour
- Module 2: Methods for studying users
- Module 3: Information literacy
- Module 4: Research use in practice
- Course literature and resources [all references and links could, in addition to being included in each module, be gathered on this separate page]
- Course assessment
- Course evaluation [assuming there is a standard for evaluating the courses – an evaluation has not been provided in this package]

Furthermore, the following could be included as documents in a document folder:

- A discussion forum for participants and trainer, including five discussion threads [if possible, the trainer should also be able to add new threads]:
 - General course issues
 - Module 1

- Module 2
- Module 3
- Module 4
- A possibility for participants to share documents with each other
- A place for participants to upload their papers and exercises to the trainer

If the course is offered with webinars, participants need access to a video conferencing system with the possibility of displaying documents (e.g. PowerPoint presentations).

It would be advantageous if the URL:s are made into links to the external sites, and opened in a new tab or window. NB! Even though all the external educational content is available online free of charge in some version, most of it is covered by copyright restrictions. Where available, I have included links to translations into other presumably relevant languages (primarily Russian). If this is not deemed relevant, do not include these links on the learning platform.

All participants can have access to all the content from the beginning.

 Lifelong Learning Programme	Effective training tools application to qualification improvement in library sector Digital library professional development syllabus (ETQIL)			
Generic Title of the Module:	ETQI M5 – User behaviour and information activities			
ETQIL SQF Level:	7			
ECVET points:	(if applicable)			
ECTS Credits:	1,5			
EQF/NQF Level:	SE	LT	LV	
	6/7 (7)	7 (7)	6/7(5)	
Learning outcomes				
Label of Learning Outcome	Training Module Code	Competence		
		Knowledge	Skills	
User behaviour and information activities	M5	...identify and apply in practical library work the basic concepts in information behaviour research		
		Be familiar with the central concepts in the research area of Information behaviour and its potential implications for professional library work	With reference to central concepts in information behaviour research, describe, analyze and identify problems regarding users and information activities in practical library work	
		...display an understanding of methods for studies of information activities in various practices		
		Be familiar with different methods for investigating the practices of various library user groups	Analyze and draw conclusions about when and for what purposes various methods for studying users may be applicable	
		... identify differences depending on theoretical perspective in approaches to information literacy-training		
		Understand the connection between theory and practice	Analyze the prerequisites and plan for information literacy-training for	

		regarding different approaches to the concept of information literacy	various user groups
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Library Marketing in Modern Society

Learning Outcomes	
Knowledge	Skills
...fill in a Business Model and identify services and customers for their library	
Be familiar with the thoughts of the library beeing business although it often is an non-profit business.	Use a Business Modeling tool to create an overview of a library.
...display an understanding of modern marketing and the consequences for the implementation of different marketing strategies	
Know about modern marketing tools and be able to relate that knowledge to various solutions for communicating with different target audiance.	Analyze and draw conclusions about target audiance, marketing strategies and activities necessary for a modern library. You will learn how to produce an effective communication plan with defined target group and marketing objectives.
.....communicate your library using a NABC model	
Be familiar with how to quickly define, create, and communicate the highest customer value for a library	Analyze a library with the NABC perspective and use the same model for doing a pitch for the same. The NABC method is
...positive feedback culture	
Be familiar with how to use a positive feedback culture during a pitch	Learned how to use and instead of but when giving feedback.

Open Access Resources

An educational idea behind the design of the course is that an important way in which participants learn is with and from each other. A key element is therefore seminars where the participants interact with each other and with you around the course topics. The course also includes self-studies in the form of reading/viewing educational content and preparing assignments. The assignments are designed to let participants come in contact with and use various relevant tools and texts, such as repositories, reference resources, and policies.

Your role in the course is primarily to interact with the participants in order to support and assess their learning. This includes the following:

- moderate the seminars (or webinars): support the participants' learning (c. 11-13 hours, excl. preparation time)
- encourage the participants to introduce themselves on the learning platform (unless everyone already knows each other) (c. 30 minutes)
- answer questions and monitor discussions on the learning platform (the group can decide on voluntary discussions) (time depends on amount of questions and discussions)
- assess the course in the following ways:
 - keep track of active participation in the seminars
 - assess the exercise (c. 15 minutes/exercise)
 - assess the paper and provide brief comments to the author (c. 1 hour/paper)

Module 1

Initiate the course by presenting yourself and inviting the participants to introduce themselves briefly on the learning platform.

The trainer's main involvement in this module is to lead the discussion seminar. Familiarize yourself well with the initiatives and infrastructures relating to open access within the countries represented by the participants. Also familiarize yourself with the open access statements (Budapest, Berlin) and the EC policies and guidelines (found in the educational content for module 4).

Seminar 1

Begin by letting the group decide how they will document their discussion. Make sure that everyone gets a chance to be active in the discussion. Contribute your own knowledge to a reasonable extent and help the group summarize and draw conclusions based on their discussion. If the group has participants from more than one country, find a suitable solution that will allow the situation in both countries to be covered, either by dividing the group into two or more sub-seminars, or by making time for discussing all countries involved. Let the group participants from different countries compare their findings and analyse the reasons for possible differences in developments in the countries. Note active participation for assessment purposes.

Module 2

At the beginning of module 2, let the group discuss in a learning platform discussion thread which research areas they will choose to focus on and strive to get them to select a broad mix of areas.

Decide beforehand on how long the presentations can be, depending on the time available and the number of participants, and inform the participants. If the group is too large, perhaps dividing them into two seminars could be an option.

Seminar 2

Begin by letting the participants present their findings, and help them to keep the time agreed on. Allow time for any clarifications necessary in relation to each presentation. For the last 30-60 minutes, moderate a discussion on similarities and differences in the participants' findings (i.e. between publishing practices in various research areas) and the discussion items provided. Help the participants make links to the educational content and the groups' previous discussions where relevant. Note active participation for assessment purposes.

Optional discussion thread

If you and (most importantly) the group have an interest in it, discuss the standpoints and priorities advocated by Kennison & Shreeves and Harnad respectively in a discussion thread. This could serve to further engage the group in joint discussion in a way where the individual can decide how much time they would like to invest. Of course, discussion threads can be used for voluntary discussions of other topics as well, as the group sees fit.

Module 3

Decide beforehand on how long the presentations can be, depending on the time available and the number of participants, and inform the participants. If the group is too large, perhaps dividing them into two seminars could be an option.

Seminar 3

See instructions for seminar 2.

Module 4

This module contains two seminars. The first one is intended to provide a chance to discuss and collaboratively think about some of the key content in open access policies before participants begin writing their papers. Scheduling should therefore allow participants some time to read the module's literature before seminar 4, and then provide time to work on the paper before seminar 5. If you prefer, you can allow the participants to work in pairs for the assignment for seminar 5 and the paper.

Seminar 4

Begin by letting the group decide if, and if so how, they will document their discussion (e.g. by noting the variations and frequency of various solutions). Make sure that everyone gets a chance to be active in the discussion. Contribute your own knowledge to a reasonable extent and help the group summarize and draw conclusions based on their discussion. Note active participation for assessment purposes.

Seminar 5

For the final presentation seminar, the participants can share drafts of their papers with each other before the seminar and be assigned to comment on one or two of their peers, if time allows for it. If the course is offered intensively on consecutive days, this may not be a viable option. Decide on a suitable maximum length of the presentations, depending on the number of participants and the time available.

The seminar will primarily be a presentation of the participants' work in progress, although their work should be as close to finished as possible. Allow for comments in relation to each presentation, but make sure to keep the time so that everyone can get comments. The comments – by the participants and you – should be oriented towards helping the author improve on their work. Note active participation for assessment purposes.

Allow participants some time to revise their papers so that they can take comments into account before they hand in the paper.

Assessment

The assessment of the course as a whole should be based on the learning outcomes and the assessment criteria.

Seminars: Keep track of participation and activity in the seminars

Exercise: Check that the exercise sheet (or corresponding documentation) has been filled out and that the answers seem plausible. You do not need to check every detail. Feedback will be provided in the seminars, by you and peers.

Paper: Assess the paper based on the assessment criteria. Language and every piece of information or every argument do not need to be entirely without flaw in order for the paper to be acceptable, but the paper as a whole should show that the author has grasped the main content, and it should not contain too obvious misunderstandings or outrageous proposals. If this is the

case, so that the paper does not reach the level of a Pass, the author should be allowed to revise the paper. Try to provide at least some comments to each author, pointing out interesting approaches or solutions as well as any problematic suggestions.

Each part of the assessment is graded with a Pass or a Fail, and the participant needs to reach a Pass on each part in order to receive a Pass on the course as a whole.

How to update the material

The course is based partly on content that should be relevant for the foreseeable future, and partly on content that is likely to become less important with developments over time. The trainer should keep track of major initiatives that are launched, not least on a European Union level, but also in influential countries such as the UK, the US, Germany, and the Netherlands. Another thing to keep track of is changes in publisher reactions to open access.

Some web sites that may be useful in keeping up-to-date and updating the course content are:

Björk et al., Research on Open Access Publishing,
<http://www.openaccesspublishing.org/>

European Commission Policy Initiatives, <http://ec.europa.eu/research/science-society/index.cfm?fuseaction=public.topic&id=1301>

Open Access Now, <http://oanow.org/>

SPARC Open Access Newsletter,
<http://legacy.earlham.edu/~peters/fos/newsletter/archive.htm>

SPARC Europe, <http://sparceurope.org/>

And some useful journals: *JASIS&T*, *Learned Publishing*, *ScieCom Info* (<http://journals.lub.lu.se/index.php/sciecominfo>),

Preparations for trainers

If you do not have extensive experience in the area, read Suber (2012) and Willinsky (2006), along with the specified educational content above.

Familiarize yourself with the European Commission policies and with the *Good practices for university open-access policies*. Also familiarize yourself with the open access infrastructure, initiatives, and history of the country/countries in which the course participants are active as professionals.

Instructions for course designers

I would suggest that the introduction, the text about each module, and a few other texts are made into separate pages on the learning platform. This would result in the following pages:

- Introduction to the course [which includes Learning Outcomes]
- Module overview
- Module 1: The OA movement, ideas and statements
- Module2: Green OA
- Module 3: Gold OA
- Module 4: Policies and strategies
- Open access basics
- Course literature and resources [all references could, in addition to being included in each module, be gathered on this separate page]
- Course assessment
- Course evaluation [assuming there is a standard for evaluating the courses – an evaluation has not been provided in this package]

Furthermore, the following could be included as documents in a document folder:

- Lecture: Green OA and the role of institutional repositories [save as .pdf]
- Exercise: Green and gold OA [For modules 2 and 3, should be provided in a file format that can be edited by the participants, so that they can use the table to fill out their answers to the questions, if they prefer. For instance .doc, .docx or .rtf]

Also, the following should be included:

- A discussion forum for participants and trainer, including three discussion threads [if possible, the trainer should also be able to add new threads]:
 - General course issues
 - Selection of research area (Exercise)
 - Point & Counterpoint: On the Purpose of Institutional Repositories [optional]
- A possibility for participants to share documents with each other
- A place for participants to upload their papers and exercises to the trainer

If the course is offered with webinars, participants need access to a video conferencing system with the possibility of displaying documents (e.g. PowerPoint presentations).

It would be advantageous if the URL:s are made into links to the external sites, and opened in a new tab or window. NB! Even though all the external educational content is available online free of charge in some version, most of it is covered by copyright restrictions. Where available, I have included links to translations into other presumably relevant languages (primarily Russian). If this is not deemed relevant, do not include these links on the learning platform.

All participants can have access to all the content from the beginning.

 Lifelong Learning Programme	Effective training tools application to qualification improvement in library sector Digital library professional development syllabus (ETQIL)			 Effective training tools application to qualification improvement in the library sector
Generic Title of the Module:	ETQI M2 – Open access resources			
ETQIL SQF Level:	7			
ECVET points:	(if applicable)			
ECTS Credits:	1,5			
EQF/NQF Level:	SE	LT	LV	
	6/7 (7)	7 (7)	6/7(5)	
Learning outcomes				
Label of Learning Outcome	Training Module Code	Competence		
		Knowledge	Skills	
Open access resources	M2	...identify and plan for open access services locally and nationally		
		Be familiar with the motivations for open access to research publications and data and the situation for open access on a national and international level.	Implement knowledge of open access services in contributions to policy development and services planning.	
		...display an understanding of disciplinary publishing practices and their consequences for the implementation of green and gold open access publishing		
	Know about disciplinary and national differences in publishing practices and be able to relate that knowledge to various solutions for open access.	Analyze and draw conclusions about the implications open access solutions and policies will have for various groups of researchers.		
		...analyse open access policy decisions from the perspective of disciplinary and national publishing practices		
		Understand	Advocate open	

		different open access policy designs and how they may be implemented as well as the implications of policy design for relevant stakeholders.	access solutions that fit the practices of researchers, librarians, publishers, and management locally and nationally.
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Information resource management

The course requires the participant to read specific papers and other documents, to complete exercises, and to complete a final assignment. The assignment is expected to be not only useful for the student to integrate information and develop personal knowledge of information management, but also to be of potential benefit to the organization either directly, or through increasing the individual's ability to participate in strategic planning discussions.

The exercises and the assignment are designed for individual completion, but there is no reason why they should not be undertaken by small groups (the exercise on environmental scanning recommends working in groups), if the participants find it appropriate.

The overall aim of the course is to introduce the participants to some key ideas from information management and to encourage them to think about whether these ideas would be useful to the organization and how they might be implemented. Your role in the course, therefore, is to interact with the participants to support and encourage these aims and to their learning. This includes:

- Encourage the participants to introduce themselves on the learning platform (unless everyone already knows each other) (c. 30 minutes).
- Set up places for discussion for each unit and explain that contribution to the online discussions is a part of the learning process as well as a criteria for assessment. Monitor discussions on the learning platform and respond to questions if there are any, either by answering yourself or by encouraging the participants to help each.
- At appropriate points in the course, encourage the participants to declare on the learning platform what they have chosen to carry out the exercises on (e.g., which of their tasks they have chosen in the information audit exercise), and what they have decided to do for the final assignment (c. 30 minutes).
- Arrange and moderate the seminar (or webinar) in module 1. Make sure each participant presents his or her observations as required and also contributes to the discussion of the other participants' presentations (c. 2 hours, excl. preparation time).
- Instruct the participants to submit their written major assignment through the learning platform at a given deadline in due time before the

seminar. After submission, draw up a schedule for the seminar where each participant is allotted equal time for presentation and discussion

- Arrange and moderate the seminar (or webinar) for the major assignment. Make sure each participant briefly presents his or her observations as required and also contributes to the discussion of the other participants' presentations (c. 3 hours, excl. preparation time)
- Assess the course:
 - monitor participation in the seminars;
 - assess the major assignment and provide brief comments to the author (c. 1 hour per assignment)

Unit 1

Contact the participants to introduce yourself and to set a time by which they should have logged on to the learning platform and introduced themselves. Your main function in this unit is to monitor discussions, encourage participation by inviting those who have not contributed to do so, and to answer any questions. Read the assigned course literature and familiarize yourself with some of the recommended literature. Reviewing the exercise yourself will help you answer queries from the participants.

Seminar 1

In this unit, you will also need to set a time when all participants can take part in the seminar. You can guide the seminar using the questions provided, or you can develop questions that you may think more appropriate in the light of comments made earlier in the module discussions.

For the final 20 minutes or so of the seminar initiate a general discussion on the advantages and disadvantages of an information management strategy for institutions in which the participants work, with particular reference to how effective internal document and data handling might support public service activities.

Unit 2

By the time this unit is reached participants should be comfortable with using the learning platform, but it may be useful to check on whether anyone is experiencing problems and to seek to resolve them.

Otherwise, your role is to create a place for sharing the outcomes of the minor assignment and monitor the discussions, help to answer questions and generally moderate what is going on. It may be useful to generate discussion topics yourself from your reading of the recommended literature, e.g., Which of the PESTLE is thought to be of most significance for the institutions concerned? How is the output from the scanning process intended to be used in the organization?

Unit 3

Your main involvement, as in the preceding units is to read the recommended literature and monitor the contributions to discussion on the learning platform.

Identify non-contributors and encourage them to participate. Answer any questions that are raised. In reviewing the exercise, consider your own work situation and work through the questions posed by Buchanan and Gibb, so that you have some direct experience on which to draw when answering questions from participants.

Major assignment

Declare at the start of the course that the Major Assignment is to be written in coordination with the three units. Make sure there is a discussion thread on the platform where the participants declare their chosen topic and where they can post questions and comments and ask the help from each other.

Seminar

Decide whether or not you as a trainer will assess the assignments before, during or after the seminar. Also decide if you want the participants to have a look at some or all of the other participants' assignments before the seminar, thus paving the way for a peer commenting schedule (that may depend on the size of the group at a time). Depending on which, set a *submission deadline* that provides you and the participants with reasonable time to read the assignments before the seminar.

Decide on a suitable maximum length of the presentations. A suggested time length for the whole seminar in this work book is three hours, but this can vary depending on the number of participants, the format of the seminar, and the time available.

The seminar will primarily be a presentation of the participants' suggestion for realistic (but still fictional, of course) recommendations to their senior management. Their work should be as realistic as possible. Allow for comments in relation to each presentation, but make sure to keep the time so that everyone can get comments. All comments should be oriented towards helping the author improve on their work. Note active participation for assessment purposes. Deliver your feedback and assessment either orally during the seminar or in writing after the seminar.

Final assessment

Assessing the seminars. Monitor participation in the seminar and assess the value of comments made.

Assessing online discussions. Keep track of the activity and input from the module participants. For the Unit 2 control the submission of group exercise outcome, chasing those who do not deliver by the due date and do not participate in the discussion.

Assessing the assignment. The assignment should be assessed in terms of how far it meets the specification set out in the description above. Has the writer selected a useful work task? Is the presentation of information on external and internal information resources convincing and effective. Do

environmental scanning and information audit appear to be properly understood? Are the recommendations to management plausible and capable of implementation.

Decide what is the minimal level of participation to get a pass for the module before the start of the training and announce it to the course participants from the beginning.

How to update the material

The suggested educational resources should not age rapidly and it is unlikely, in the immediate future, that significant new developments will take place that necessitate a completely new approach to the management of organizational information. However, developments in technology and software do occur and, at the moment, cloud technologies, provided by Amazon, Microsoft and others are being promoted as potential outsourcing answers to the problems of information management. Keeping an eye on developments such as this and monitoring the news through Google or another search engine should be enough to remain abreast of developments.

If updating does become necessary, the key qualities needed for supporting literature for the course is that it should be generic in character, dealing with the topic as a whole, rather than research literature on specialised aspects, and that it should use visualisation, as in PowerPoint presentations wherever possible, to clarify the relationships among concepts. The Website Slideshare (<http://www.slideshare.net/>) may be useful, together with the Website of AIIM (<http://www.aiim.org/>).

Preparations for trainers

Prepare before the start of the course by reviewing the required reading, and some of the suggested additional reading and/or videos. Review the exercises and think about what can be expected of the participants.

Familiarize yourself with the learning platform so you can navigate it with ease and know what it contains, specifically how to upload and download material, and how to post in discussions and edit the contents. See if you are content with the prepared discussion threads for the course on the platform, or if you can foresee the need for additional threads and topics.

As soon as you have the list of participants determine their affiliation and, where possible, job role, so that you have an understanding of the background to the issues they may raise. Use the initial session to get to know the participants.

Read a little more widely than the indicated material to give yourself a wider knowledge of the field.

Develop a module evaluation questionnaire online seeking students opinions on the usefulness of provided readings and other materials, on the complexity of tasks, balance between different activities, trainers role and the overall impact on the competence of the participants. Use the feedback critically in updating the course material when necessary.

Instructions for course designers

All participants should have access to all content from the beginning of their enrolment in the course.

The page structure of the learning site should follow the structure laid out above, i.e.:

- Introduction [including Learning Outcomes and Course overview]
- Unit 1: Introduction to information management – including the seminar
- Unit 2: Environmental scanning
- Unit 3: Information audit
- Major assignment
- Course and recommended literature – copied from the individual modules on to a separate page
- Course assessment
- Course evaluation

Also, the following should be included:

- A discussion forum for participants and trainer, including these discussion threads [if possible, the trainer should also be able to add new threads]:
 - General course issues
 - Unit 1
 - Unit 2
 - Unit 3
 - The minor assignment
 - The major assignment
- A possibility for participants to share documents with each other
- A place for participants to upload their major assignments

If the course is offered with webinars, participants need access to a video conferencing system with the possibility of displaying documents (e.g. PowerPoint presentations).

The URLs for the learning resources should be made into links to the external sites, and opened in a new tab or window

 Lifelong Learning Programme	<i>Effective training tools application to qualification improvement in library sector Digital library professional development syllabus (ETQIL)</i>			 Effective training tools application to qualification improvement in the library sector
Generic Title of the Module:	ETQI M8 – Information management			
ETQIL SQF Level:	7			
ECVET points:	(if applicable)			
ECTS Credits:	1,5			
EQF/NQF Level:	SE	LT	LV	
	6/7 (7)	7 (7)	6/7(5)	
Learning outcomes				
Label of Learning Outcome	Training Module Code	Competence		
		Knowledge		Skills
Information management	M8	...critically assess the role of information management within the organization		
		Be familiar with the main concepts of information management and be able to explain the value of information management for the organization.	Demonstrate the ability to analyse the present situation of information management in the organization. Identify the bodies of information in their organization that require management, determine how far modern information management techniques are applied.	
		...display an understanding of the value of environmental scanning for the management of the organization.		
		Identify the environmental factors that have a bearing on the management of organizations.	Apply environmental scanning techniques for monitoring the organizational environment	
		...display an understanding of the relationship between available information resources and the information needs of the organization.		
		Explain the role of information audit in organizing the internal	Apply the information audit technique to a	

		information resources of the organization.	limited area of activity.
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