



Europeana – Core Service Platform

MILESTONE

MS8: PLAN FOR TRAINING AND WORKSHOPS OF AGGREGATORS FOR DATA PROVIDING PARTNERS

Revision	1.0
Date of submission	30 June 2015
Author(s)	Henning Scholz (EF), Kerstin Herlt (ACE), Julia Welter (DIF), Maria Teresa Natale (MICHAEL), Marzia Piccininno (MICHAEL), Corinne Szteinsznaider (MICHAEL), Walter Berendsohn (FUB), Joerg Holetschek (FUB), Gisela Baumann (FUB), Kate Fernie (2Culture), Dimitris Gavrilis (AthenaRC), Marco Rendina (eFashion), Johan Oomen (NISV), Andrew Ormsby (BUFVC), Afelonne Doek (IALHI), Gariella Ivacs (IALHI)
Dissemination Level	Public



Funded by
the Connecting Europe Programme
of the European Union

REVISION HISTORY AND STATEMENT OF ORIGINALITY

Revision History

Revision No.	Date	Author (Organisation)	Description
0.1	27/05/2015	Henning Scholz (EF)	Template and initial draft
0.2	26/06/2015	Henning Scholz (EF), Kerstin Herlt (ACE), Julia Welter (DIF), Maria Teresa Natale (MICHAEL), Marzia Piccininno (MICHAEL), Corinne Szteinszneider (MICHAEL), Walter Berendsohn (FUB), Joerg Holetschek (FUB), Gisela Baumann (FUB), Kate Fernie (2Culture), Dimitris Gavrilis (AthenaRC), Marco Rendina (eFashion), Johan Oomen (NISV), Andrew Ormsby (BUFVC), Afelonne Doek (IALHI), Gariella Ivacs (IALHI)	Final draft
1.0	30/06/2015	Henning Scholz (EF)	Final comments integrated, minor changes, layout edits

Statement of originality:

This milestone contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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Introduction

The aggregators participating in the Europeana DSI will organise and offer altogether at least 10 trainings and workshops for (current and potential) data providing partners of the aggregators in order to raise their competency levels. Different types of training activities are envisaged depending on the topic and its complexity and the needs of specific networks. Aggregators will, for example, organise workshops for their partners on rights clearance, the implementation of the Europeana Publishing Framework¹ and Guide², data quality improvements, optimal use of EDM, metadata enrichment tools, and other topics. In some cases, individual and on-site training with partners are planned to help implement specific tools, such as tools to map their data efficiently to EDM.

For IPR specific training, a close alignment will be made with the work planned under Task 4.4 of the Europeana DSI, which is about the coordination of Europeana DSI's advocacy and policy development on IPR. An IPR training plan for aggregators is going to be delivered in July 2015 (MS22) to ensure information on best practices is disseminated to all partners and a good understanding what level of IPR expertise is necessary for an aggregator to operate successfully is developed.

The Europeana DSI Description of Work contains in section 4 an overview of trainings and workshops planned by the aggregators. The plan for training and workshops of aggregators for data providing partners provided below is a consolidated version of this plan, that was updated and amended to consider recent developments and ensure that training activities are aligned as much as possible between aggregators.

The implementation of this plan for training and workshops of aggregators for data providing partners as well as the IPR training plan of Work Package 4 of the Europeana DSI will inform the development of the Europeana DSI expert hub concept. Understanding which aggregator is able to share what kind of knowledge and expertise in training workshops for partners will help to strengthen the profile of each aggregator and become known as an expert in a specific field. In making training efforts transparent and allowing aggregators to collaborate will make it easier and more efficient to raise competency levels across the network and benefit from expertise being available in the network. The work and implementation plan to innovate the aggregation infrastructure will incorporate the lessons learned from the training activities in 2015 to make a proposal on how to raise competency levels in the future when aggregators are recognised expert hubs of the aggregation infrastructure.

Trainings and workshops per aggregator

European Film Gateway

ACE, together with DIF, will organise a meeting addressed at EFG and ACE members as well as other film archives interested in collection management, interoperability and data quality. The meeting will be held during the Cinema Ritrovato Film Festival in Bologna, Italy, on 3 July 2015. Traditionally, the Bologna Film festival attracts film archivists from around the world and is an excellent place to reach out to the wider film archive community. ACE invited 34 film archives already contributing to EFG and Europeana, and 15 ACE members that are not yet connected. The event is also open to colleagues from film archives outside of the ACE network, attending the Festival, and is promoted to them accordingly.

¹ http://pro.europeana.eu/files/Europeana_Professional/Projects/Project_list/Europeana_Creative/Deliverables/eCreative_D3.3_KL_v1.0.pdf

² <http://pro.europeana.eu/publication/publication-policy>

The planned meeting will focus on updating existing partners as well as potential partners on Europeana DSI and on the data delivery workflow. Partners already connected to EFG and Europeana will be encouraged to provide further data contributions in the coming months and years, while archives not yet connected to the portals will be informed about the different possibilities of how to get their data into EFG and Europeana. The meeting will be used as a platform to identify archives that have digital collections in store, which could be made available through the portals and to identify possible test contributors for Europeana's cloud-based service. Most importantly, the attendants will be informed about and familiarised with quality standards for metadata and rights labelling in Europeana. A representative of the Europeana Foundation is invited to the meeting to present the main points of Europeana's strategic plan and the extension of the Europeana Licensing Framework.

The meeting will also focus on domain-specific challenges in contributing to the Europeana DSI. It will tackle rights clearing and labelling issues and promote results from the FORWARD (Framework for a EU-wide audiovisual orphan works registry) project. A dedicated 2-hour session is used for that purpose.

The presence of a Europeana Foundation staff member will ensure results of the meeting will directly feedback to the Foundation. ACE will take care of feedbacking relevant results of the meeting to the Europeana Network and the Europeana DSI (through Europeana Pro). The results and relevant documentation will also be shared among the ACE network and with the wider film archive domain through the ACE and EFG website and mailing lists with those who could not attend the meeting. Regular contacts and updates after the meeting will ensure a close contact between ACE, DIF and the (potential) partner archives and allow for a proper follow-up of the meeting results and discussions. A helpdesk for all questions regarding data contribution and presentation as well as rights labelling is available at DIF, the former coordinator of the EFG projects.

In connection to the meeting, ACE, together with DIF, will carry out a survey among the film archive community to evaluate the quantity and quality of content the EFG partners (existing ones as well as potential new ones) could give access to through Europeana. It will also help identify those archives that could carry out relevant quality improvement of their metadata already available on EFG and Europeana. This survey will be sent out before the meeting, further discussed during the meeting and the feedback received by the end of July will be evaluated by ACE. The survey results will be used to identify those archives, which can provide the most meaningful collections with the best data quality and/or carry out the most meaningful data enrichment. Based on the survey results further negotiations will be taken up with the relevant partners about a possible subcontract foreseen in the ACE budget for data contributions and/or enrichment activities of film archives.

MUSEU

MICHAEL will support and extend Europeana's DSI work in helping museums to engage with open content licenses (CC0, the Public Domain mark and the Europeana Data Exchange Agreement). MICHAEL will provide already published material explaining the value and impact of open licensing of metadata and work with the Europeana Foundation to raise awareness of the practical opportunities arising from it.

MICHAEL will ensure that museums are suitably skilled and motivated to participate in the Europeana DSI. MICHAEL will achieve this through a combination of workshops, webinars and online supporting material. Two face-to-face training events are planned, one to be held in Italy, one in Germany. One webinar will be set up and all training resources and guidance material will be available as online supporting material. The focus of the training is to support skills development on digitization, IPR with specific reference to museum digital objects, multilingual

terminologies, including the training for mapping using MINT and Europeana Inside and the use of aggregation platform. The online supporting material will be available on Museu-Hub that MICHAEL will be in charge to set up. A more concrete plan about the guidelines to be produced and the dates of the training workshops will be available not before September 2015. MICHAEL will also encourage networking and mutual support among European museums.

MICHAEL will also organise and host the 2nd Aggregator Forum meeting in 2015. It will take place in Rome from 22 to 23 October in the National Library and the Istituto centrale per il catalogo unico delle biblioteche italiane (ICCU). The meeting will bring together the aggregators collaborating under the DSI to continue the work on innovating the aggregation infrastructure.

OpenUp!

The first year will essentially lay the grounds for the drive to expand the network, for example by putting together success stories about access to existing providers mediated by Europeana and compiling the existing information about IPR issues specific to the natural history community. Drawing on our experience in OpenUp! a contact person specialized on IPR related issues will ensure the collaboration with the Europeana Foundation and Kennisland in order to fulfill Task 4.4. Also taking into account that several documents have to be understood and signed by the respective administrations (MoU, SLA, DEA), Freie Universität Berlin cautiously set the expected numbers to at least 5 new providers fully contributing to Europeana DSI, with at least 15 more already in the pipeline and expected to do so in the second year.

Freie Universität Berlin will continue to offer the BioCAsE helpdesk for new providers on a permanent basis (Jörg Holetschek, Berlin). Support includes assistance for the installation of the BioCAsE wrapper and mapping software, help in configuration and mapping issues, debugging as well as consultation in terms of data compatibility, mandatory data elements, etc. Freie Universität Berlin will assist partners to implement the OpenUp! Data Quality Toolkit and use new features of this software.

A two-day workshop targeted at new providers will be organised between February and April 2016, probably in Italy. Italy recently installed a large network of BioCAsE providers, within several dozens of collections not yet connected to Europeana. Workshops will include hands-on sessions on technical issues and discussions about the most frequent problems in the ingestion workflow. The need to organise a second, similar workshop may arise in order to cover the number of potential providers.

CARARE

2Culture with Athena RC will organise a meeting of the CARARE network to build partner relations, share knowledge and experience of as data quality, innovation, metadata enrichment, IPR and Open Data.

The CARARE network has an interest both in IPR policy and R&D which 2Culture will support the work on IPR-policy and Research and Development under this task.

2Culture, working with Athena RC, will plan and deliver two training workshops for CARARE network members, to increase their knowledge and awareness of data quality issues and the availability of tools to support improvements in data quality, and to raise awareness of the Europeana Publishing Framework³. The focus will be on promoting the value of metadata enrichment and curation services of the MORE (Metadata & Object Repository) aggregator

³ http://pro.europeana.eu/files/Europeana_Professional/Projects/Project_list/Europeana_Creative/Deliverables/eCreative_D3.3_KL_v1.0.pdf

infrastructure to data providers, transferring knowledge on ensuring metadata quality, and demonstrating the value of providing high quality metadata to the Europeana platform. The workshops are planned to be held later in 2015 or early 2016. The audience for these workshops will be practitioners, technicians and trainers. The training materials produced for these workshops will be published online under an open licence and disseminated to the wider network. In addition, 2Culture will propose to video record the training to enable dissemination to the wider network. A video crew will be hired to record the training.

Athena RC will establish and operate a helpdesk service for the duration of the project, providing support on the various aspects of the project that include:

- MINT usage
- MORE usage
- Metadata mappings
- Metadata enrichment
- Metadata quality
- Aggregation process workflow

Support will include online usage manuals, training guides along with screencasts where applicable. Furthermore, a ticketing system, a Q&A and a set of interactive online guides will be provided.

This helpdesk service will be extended to support other projects that might be interested in using MINT, MORE, or learn about aggregation, validation and quality assurance of EDM metadata. Although the primary schemas that will be covered by the project are: EDM, CARARE and ESE, more could be supported if needed (requires that the appropriate support from the owners of the schemas will be provided).

Europeana Fashion

Europeana Fashion will organise at least two training workshops, targeting fashion institutions both inside and outside its network. The first workshop will be held in October/November 2015, the second one in April 2016. The workshops will focus on:

- the optimal use of the EDM-fp (fashion profile) schema;
- the metadata and data quality requirements for optimal publication in the Europeana DSI;
- the advanced use of metadata enrichment tools, like the MINT group annotation tool (used by the Europeana Fashion aggregator);
- how to choose the right licensing label for the provided online digital objects (in collaboration with Task 4.4).

These events will be also integrated with the production of guidelines and best practices documents (like the one already produced by Europeana Fashion on IPR best practices for fashion objects) that will be distributed online on the Europeana Pro and eFashion channels and portal.

EUScreen

EUScreen will reach out to new and existing network partners to gain input on their experience with the tools at hand and improve the competences for data exchange. It will set out to survey the base understanding of existing and potential partners of exchanging data, based upon which the aggregator invests in a series of regional training workshops, whereby participants will be coached based on their evaluated expertise. Topics include:

- audiovisual archives and Europeana: added value for partners;
- present the EUScreen content selection policy and metadata schema for EUScreen;
- discuss and manage potential IPR issues;

- discuss the delivery workflow;
- discuss technical prerequisites and specifications.

The outcome of such training workshops will be a mentoring scheme, whereby more technically experienced partners will serve as go-to's for the less experienced partners. Feedback coming out of this mentoring, i.e. what parts of the learning curve could be leveraged to improve the existing data provision structure, will provide input for further technical development of the aggregator and the technical infrastructure maintained by the Europeana Foundation.

EUScreen will organise one workshop in January 2016 to which 20 potential data providers will be invited.

1. Organising an expert workshop aimed at potential additional partners. The goal is for them to get acquainted with the project. Various study materials will be provided. After the workshop, each participating organisation will be offered a support package, assisting them to connect to the aggregator. Sound and Vision will act as the liaison between the organisations and the partners in EUScreen that provide the technical support infrastructure.
2. As part of the subcontract, efforts will be undertaken to capture the workshop in a number of online courses, supporting the growth of the number of aggregation partners in the future. An existing online platform will be selected to facilitate the online publication. One likely candidate is the widely-used platform maintained by the non-profit Peer 2 Peer University (P2PU).

HOPE2.0

On behalf of the HOPE project IALHI has already conducted a survey to map the potential interest to become a data provider, IALHI is in touch with the interested institutions and keep updating them about the latest developments. The next step is to select the candidates from this pool based on detailed interviews with a set of the minimum requirements on technical capacities, digital content, available human resources/expertise and IPR provisions. The results will be discussed, analyzed in June-July, 2015, candidates will be informed and the report will be shared during the summer, by August 1, 2015.

In parallel with the previous initiative IALHI is conducting a research on previously submitted collections to find flaws, discrepancies, missing data in comparison with the EDM model, IALHI would also like to continue enriching the social history tags, collection descriptions. The self-auditing exercise will make Europeana's emerging needs understood better, as IALHI may also consider consulting an expert to review current practices and provide recommendations on improving the user experience. The work needs to be done in two ways: the core team will find missing, mismatched data through queries, algorithmic analysis etc. The problems will be listed and explained in an internal report sent to the existing providers. The same result set will be looked at by the external expert, his/her recommendations will be integrated into the report to be prepared by August 31.

The 46th IALHI annual conference will take place in Edinburgh, on September 16-19. The event will have an extension of a 2 day workshop: an interactive training seminar will be offered to the future and present data providers of the Socialhistory Portal (the socialhistory portal is the gateway/aggregator to Europeana as well). The aim of the workshop is twofold: it will provide on-site training about the metadata requirements, IPR, ingest procedures to ensure the most efficient and effective way to deal with ingesting metadata to the Europeana DSI. But the presence of the former data providers will also highlight the importance of the knowledge transfer and will make participants to review the best practices captured through the [HOPE WIKI](#). Europeana DSI IPR

experts will be invited to the workshop. After the conference and the workshop IALHI will establish a HELP DESK to provide guidance on the following domains: technical requirements, content requirements, IPR requirements. Onsite training will be scheduled through the HELP DESK service.

During the next phase of the trainings, expert helpers will travel to the sites of data providers to aid and train their staff, thus enabling them to improve the quality of the metadata and do the ingestion on their own in the future. The series of on-site visits will start in November 2015 and finishes by April 2016. The [HOPE WIKI](#) will be updated and adapted to the Europeana DSI framework and its constant refreshment will be part of the consultancy services. The onsite training will raise the competency levels of all data providing partners, in their own institutions with their own metadata systems. In these trainings IALHI will focus on the use of standards and vocabularies, the quality of metadata, the implementation of persistent identifiers for all metadata records and digital objects, and the implementation of direct links to their provided digital content.

The European Library

In 2015, The European Library will continue to work with its core members of 40+ national libraries. Two workshops will be held, one in Zagreb in September 2015, and another one connected to the Europeana Network AGM in November. It is envisaged that most library members will attend the Zagreb event, while perhaps half will attend the event in Amsterdam.

The workshops will cover the following themes:

- Changes to TEL and Europeana and the ramifications for the ingestion process
- Requirements from library partners as TEL moves to becoming an expert hub
- Information on new Europeana policies, particularly on the Europeana Publishing Framework⁴, and its relationship to channels
- Europeana Research and how it helps library partners
- Discussion on the TEL content policy, with attention paid to position of bibliographic data

Overview of meetings, trainings and workshops

The below table summarises the meetings, trainings and workshops planned and scheduled by the aggregators to date. With the list provided below the target of 10 meetings organised by aggregator consortium partners for aggregators and/or data providers (workshops, trainings, Forum) will be met.

Aggregator	Type of meeting	Date
EFG	Network meeting	3 July 2015
MUSEU	2 training workshops Aggregator Forum meeting	2nd half 2015/early 2016 22-23 Oct 2015
OpenUp!	Workshop	early 2016
CARARE	Network meeting 2 training workshops	18-19 June 2015 late 2015/early 2016

⁴ http://pro.europeana.eu/files/Europeana_Professional/Projects/Project_list/Europeana_Creative/Deliverables/eCreative_D3.3_KL_v1.0.pdf

Europeana Fashion	Workshop Workshop	Oct/Nov 2015 April 2016
EUscreen	Workshop	Jan 2016
The European Library	2 training workshops	Sep 2015 (Zagreb) Nov 2015 (Amsterdam / related to AGM)

Conclusion

It is obvious from the plans of the aggregators that there is a need for regular training and for regular network meetings to raise the competency levels of data providing providers and improve the relationship with them. It is also obvious that the aggregators are very experienced and knowledgeable, to act as experts for their communities. The Europeana DSI should capitalise on this expertise and start to recognise the aggregators as expert hubs. This requires to build a list of domain and subject experts for various topics that can be called for various questions. Eventually this needs to be built into a matrix to allow also national aggregators to benefit from the expertise of domain aggregators, and domain aggregators to benefit from the services of national aggregators. This work will be carried out as part of the aggregation infrastructure innovation. A working group was set up at the Aggregator Forum meeting in May 2015, to investigate and develop the concept of expert hubs. The definition and vision for expert hubs together with a plan how to develop them over the next years will be published with the work and implementation plan to innovate the aggregation infrastructure in early 2016.

Two items in the list of topics that aggregators identified as important for training workshops are very prominent, which are IPR and MINT. As several aggregators are working with MINT, the need for training is obvious to ensure data providers are able to provide their data as efficient as possible in the highest possible quality. As domain specific aspects are important for the work with MINT, having a general MINT training for all aggregators is not sufficient. However, a good coordination of this overlapping training requirement is important to make sure we use the resources as efficient as possible. The helpdesk service set up by Athena RC for various ingestion related aspects (including MINT) is also an important resource that other MINT users should investigate. A staged approach is suggested to set up trainings for MINT users. Based on the inventory of training needs presented herein, aggregators that would like to offer MINT training for their partners should do some research to specify these needs in more detail. The outcomes are shared between all aggregators to align training needs in a second stage, in order to maximise the use of expert knowledge among all partners.

The work carried out to coordinate Europeana DSI's advocacy and policy development on IPR will help to align training needs of aggregators and support aggregators in raising competency levels of data providing partners on IPR. The IPR training plan for aggregators will be delivered as MS22 in July 2015. That will incorporate the need of IPR training indicated above.