

ROMOR Training Delivery Plan

WP2.3

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1 Introduction

The WP2 objectives are:

- Developing tailored training to increase capacity among PS research support staff for designing, implementing, operating, populating, and sustaining OAIRs;
- Equipping PS research support staff to deliver training on research output management to researchers at their own institutions.

WP2 started at the Preparation Phase of the ROMOR project, immediately following on from the deliverables of WP1 on User Requirements. A Workshop has been organized in Parma (15-17 May 2017), where some decisions (WP2.1.1)¹ were made on the training structure and the educational material to be produced. A document entitled Guidance Report (WP2.1.2)² was drawn up after the end of Parma Workshop. This document has matched the results of the Workshop in Parma with the needs highlighted by WP1.

In the Guidance Report WP2.1.2 the areas of competencies related to Data Management and Data Engineering, developed by the EDISON Project³, were matched to the objectives/needs of the ROMOR Project. The EDISON competencies of these two areas have been compared with the educational and training needs evidenced by WP1 by the PS HEIs for technical and operational staff. Three levels of mastery (or proficiency) were defined for each of the competencies to allow flexible curriculum development and the definition of the professional profiles: Familiarity (entry), Usage (core), and Assessment (expert).

In WP3, the “Training the trainers” will be delivered in three Workshops: Basic (entry), Intermediate (core), Advanced (expert).

This Training delivery Plan represents the collaboration between WP1, WP2 and WP3: WP1 defines the needs, WP2 defines the requirements for shared educational materials, and WP3 defines the operational and technical training to be delivered.

All ROMOR EU HE partners were involved and/or will contribute to educational material and training (WP2 and WP3) as teachers and tutors. Partner PS HEIs together with IUG and TUWIEN will be the main assistant partners to facilitate this learning material production and WP2 work package.

¹ WP2.1.1

<https://drive.google.com/file/d/0B2aU3ro2bO9icXg0ZVVLU1EwZDg/view?usp=sharing>

² WP2.1.2 https://docs.google.com/document/d/1-TrnxGpAMJ32r_8xq0yjj4zbY-H0Ax02-phE_r8M-no/edit?usp=sharing

³ <http://edison-project.eu/>

2 Training delivery structure

This Training Delivery Report has been prepared including time, location, trainers, trainees, learning objectives etc. for conducting "Training the trainers" sessions using the vocational training materials to be developed. The ROMOR planned "Training the trainers" sessions using the vocational training materials to be developed are the following:

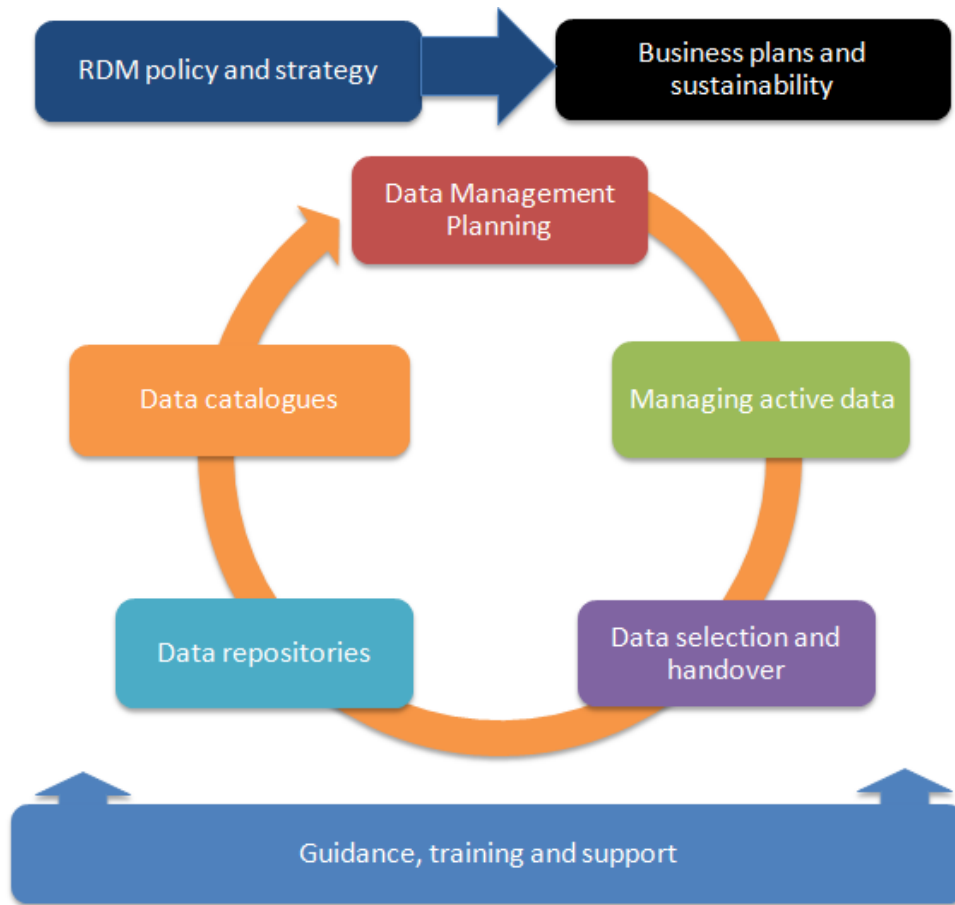
Courses	Time	Location	Trainers	Trainees
Intensive Basic training	6-8 Sept 2017	Parma	TUWIEN, PARMA, GLA (including teachers from Brighton)	Basic Level
Intermediate training and evaluation	15-16 January 2018	West Bank	TUWIEN, PARMA, GLA (including teachers from Brighton)	Intermediate Level
Advance Training (Summer School)	18-20 June 2018	TUWIEN/ Glasgow	TUWIEN, PARMA, GLA (including teachers from Brighton)	Advanced Level

2.1 Aims and objectives of ROMOR training

The main goal of this vocational curriculum is to build capacity in implementing institutional repositories, and in technically and operationally managing these repositories for storing and preserving research outputs.

ROMOR partners have agreed to employ the DCC's RDM service model to structure our training including an emphasis on:

- softer infrastructure aspects including policies, business planning and training;
- more technical infrastructure requirements which are based around the data lifecycle.



<http://www.dcc.ac.uk/resources/developing-rdm-services>

3 ROMOR Project Workshop “Research Outputs Management (ROM) - Basic Level”

The first Basic Training Course has been held in Parma, 6-8 September 2017.

Trainees from partner PS HEIs are trained by professional staff from partner EU HEIs on research output management and on establishing institutional digital repositories (design, implementation, maintenance and management methods). The basic training focused on foundational aspects and on building the practical and technical skills of the trainees in dealing with *open source* software products and other tools needed for the design and implementation of digital repositories.

The purpose of the intensive basic training is to understand the issues involved in ROM, access and re-use and suggested ways of enhancing support services with a focus on the PS HE partners’ needs. During the workshop in Parma it was decided to put all the

stakeholders together to start the teamwork that is necessary for the management of research outputs.

3.1 Intended audience

Scholars, repository managers, staff, librarians (estimated number 26)

3.2 Learning outcomes

Here are the learning outcomes for the ROMOR introductory course on ROM.

- Understand international drivers for Research Outputs Management and sharing
- Learn how Research Outputs Management and curation can facilitate data sharing and increase citations
- Understand what infrastructure and support services are required
- Be aware of some of the free tools and support services available

3.3 Pedagogy

1. Case studies about data repositories, as they are currently done in Europe
2. Work Group: Looking at Business Model Canvas (BMC) as a means of for developing an RDM business model. See an example of a course The Digital Curation Centre ran for developing services at:
<http://www.dcc.ac.uk/events/workshops/developing-research-data-management-services>

3.4 Programme content structure

The video recording from the event can be accessed at:

https://drive.google.com/drive/folders/0BxfAEy8R_s5oSWUwVzJ4SDNHNEE?usp=sharing

The slides for the lectures are also available for download from:

Day One

https://drive.google.com/drive/folders/0BxfAEy8R_s5oM25fYXdPc0R6Qjg?usp=sharing

Day Two

https://drive.google.com/drive/folders/0BxfAEy8R_s5oc1R2T3R0aEg2Z0k?usp=sharing

Day Three

https://drive.google.com/drive/folders/0BxfAEy8R_s5oVGdYU3JvN0tJekk?usp=sharing

The workshop other materials (e.g. photos, etc.) can be accessed at:

<https://drive.google.com/drive/folders/0B2kTbbnactQoSUNtUjNkUWhZSFE>

3.4.1 Research outputs management in a nutshell

This introductory session will provide an overview of reference models that will help to refine the range of services and infrastructure required to effectively manage and preserve access to research outputs. Key terms will be explained and contextualised to provide a solid foundation for the remainder of the workshop. The common framework used in preparing the introductory workshop is based on the Research Data Management Services as proposed by “The Digital Curation Centre” (DCC).

Learning objectives

After this session participants will:

- understand what digital curation is and how it relates to research outputs management
- be familiar with the DCC’s curation lifecycle model and RDM service model
- be familiar with the OAIS reference model and how it can be applied to the design of open access information repositories and related services
- be able to communicate more consistently by ensuring a shared understanding of key terms

3.4.2 How to design and implement research outputs repository

Learning objectives

Participants will:

- Understand the potential role(s) of an OAIR
- Understand the range of institutional services that may be involved in supporting research outputs management

3.4.3 Developing policies for research outputs management

During this session, participants will consider the range of policies needed to support the management of research outputs within their institutions.

Learning objectives

After this session, participants will:

- be better able to audit the policies they already have in place and to scope amendments or additional policies needed to support ROM
- have an understanding of the practical implications associated with implementing and monitoring policy compliance

3.4.4 Developing policies for research outputs management: scoping your services

When developing research output management systems, it is important to be clear on who you are developing the systems for, what you want users to be able to do, and how the service will be governed. This session will help participants to think through some of the key issues that need to be addressed before implementing any services.

Learning objectives

After this session, participants will:

- be able to scope research outputs management (ROM) service provision at their HEIs
- be able to identify value added services for their repositories
- have improved their ability to engage in strategic planning
- have a draft value proposition for their ROM service

3.4.5 Sustainability and business planning

This session will consider the longer term sustainability of ROM services and provide an introduction to Business Model Canvas (BMC) as a tool to help develop a longer term business plan.

Learning objectives

By the end of this session, participants will:

- be able to flesh out a Business Model Canvas (BMC) to be completed as homework when they return to their HEI
- be able to identify the value proposition(s) that the OAIR will provide and to start to develop a business plan to deliver and sustain their ROM services.

3.4.6 Research outputs management services

Learning objectives

After this session, participants will be more familiar with the range of components associated with RDM service infrastructure:

- RDM policy and strategy
- Business plans and sustainability
- Guidance, training and support
- Data management planning
- Managing active data
- Data selection and handover
- Data repositories

- Data catalogues

3.4.7 Digital Preservation

An introduction to Digital preservation

Learning objectives

After this session, participants will know:

- What is digital preservation
- How can we preserve digital objects
- How do we build a preservation plan
- OAIS

3.4.8 Making the most of research outputs

Learning objectives

Participants will learn how to:

- define an OAI-PMH query;
- look for an ORCID profile and compare available information with the repository requirements;
- go to a CRIS/RIMS page and detect what information can be exchanged;
- investigate an external metadata source and illustrate what information can be useful as IR input;
- examine a bibliometric source and define how this information can be represented in the IR.

3.4.9 Research outputs repository

Learning objectives

Participants will learn to:

- Understand what is a repository system
- Compare repositories

3.4.10 Metadata for Research outputs management Part 1

Learning objectives

By the end of this session participants will:

- be better able to define minimum metadata requirements to support FAIR access to outputs (Findable, Accessible, Interoperable, Reusable)

3.4.11 Metadata for research outputs management Part 2

Learning objectives

- Ability to register and describe data sets
- Ability to link to related publications in OAIRs, journals or external repositories
- Encouraging researchers to register for ORCIDs
- Making use of internal grant IDs when describing research outputs
- Making use of data held in other systems to reduce burden by automating description (CRIS systems, institutional publications repository)

4 ROMOR Project Workshop “Research Outputs Management (ROM) - Intermediate Level”

The second Intermediate Training Course was conducted at ALQUDS OPEN UNIVERSITY (Ramallah), and at PALESTINE TECHNICAL UNIVERSITY (Tulkarm) in the period January 15-17 2018.

4.1 Intended audience

Scholars, repository managers, staff, librarians (estimated number 60)

4.2 Assumptions

- Different requirements of partners - advanced vs basic
- Repository selection is a task for PTUK and IUG
- There will be a third workshop in Vienna to address other challenges

4.3 Learning objectives

- Putting the Business Model Canvas into practice by developing an Institutional Implementation Roadmap
- Coordinating ROMOR activities with the plans of the PS ministry

4.4 Pedagogy

Interactive training and Group Work [limited online participation]

4.5 Programme content structure

The video recording from the event can be accessed at:

<https://www.youtube.com/watch?v=rApkNRPA49c&feature=youtu.be>

The slides and reference materials are now available in the Presentations Folder:

<https://drive.google.com/open?id=1g2lepEyLzmSSHaSea-Pjoq9IEceQNsub>

4.5.1 From Repositories to Research Output Management Infrastructure.

Who provides necessary information and when?

Which systems can help in the management of digital assets?

Learning Objectives

By the end of this session participants will be able to:

- identify stakeholders at each lifecycle stage
- identify how available information changes over the lifetime of a DMP
- how the need for information changes over the lifetime of a DMP
- identify systems that have this information.

4.5.2 Policies

Can your institution make commitments regarding DMP?

What phrasing of a RDM policy would work for your case?

Learning objectives

By the end of this session participants will:

- Understand RDM policies
- Know a RDM policy model

4.5.3 Data Management Plan

This session will introduce participants to the range of information that is captured across different research support systems and how they might support research outputs management more effectively.

Why do we need a Data management Plan (DMP)?

Learning objectives

By the end of this session participants will:

- be aware of the range of systems and processes they need to consider joining up during the pre, in and post award stages of the research lifecycle
- be aware of how they might better reuse information across systems.
- be aware of DMP online and how it works

4.5.4 Sustainability planning

This session will continue the work started in Parma on developing a business and sustainability plan for your OAIR and support services.

Learning objectives

By the end of this session participants will:

- Have a set of key objective and targets for their OAIR and support services
- Have started to plan for the implementation of their services
- Have plans for monitoring and evaluating progress

5 ROMOR Project Workshop “Research Outputs Management (ROM) - Advanced Level”

The advanced Workshop (Study School) will be held in Wien on 18-20 June 2018. Suggestions for this workshops were taken during the evaluation of the basic and intermediate training workshops held in January 2018. **This section is still under construction.**

5.1 Intended audience

Scholars, repository managers, staff, librarians (estimated number 26)

5.2 Learning objectives

5.3 Pedagogy

5.4 Programme content structure

6 Assessment

The success of training may be gauged in terms of attainment of learning objectives; but this implies longer-term follow-up, beyond immediate post-training evaluation.

6.1 Evaluation procedure

As part of the evaluation of learning objectives, a [questionnaire](#) is to be distributed. Participants might be asked what they see they have achieved in practice on the basis of training needs that they themselves have.

Prior to each training event, a detailed training program description booklet (Training Delivery Plan) is to be drafted including clear learning outcomes for participants and practical activities planned.

Following each training session, feedback is sought using a standard online form to ensure consistency across the life of the project. Feedback will be used to improve the materials and approaches for future training events.

A short summary of event feedback is to be produced as a report and will be used to help refine training events that are run at later stages of the project.

6.2 Evaluations of already conducted training sessions

[Basic training evaluation](#)

[Intermediate training evaluation](#)