



TRAINING METHODOLOGY

Platform for search of Audiovisual Resources
across Online Spaces

PHAROS

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Executive Summary

This document has been prepared in order to define and describe the training activities foreseen by the PHAROS project. Engineering is coordinating this activity in the context of the work-package 5.3, but the contribution of other partners is foreseen in terms of responsibilities for each training module.

The training activities are developed in order to guarantee and facilitate a future utilisation of the PHAROS platform, so it is worthwhile to emphasize that all the materials and modules of the training will be prepared both for the end users and technical actors, as well as for the PHAROS Federation members.

This deliverable summarises the main information on the PHAROS training methodology, a combination of modules with the aim of helping all the partners, Federation members and other interested parties to easily use and manage the PHAROS platform and its components.

Chapter 1, *Introduction*, explains in more detail the subject of this document, how the training activities will be developed, and presents methodologies and didactical structures.

Chapter 2, *User Groups Selection*, details the procedures for the identification of the user groups. It explains how user groups should be selected, what should be the target audience and other related specifications. Trainer's characteristics and skills are also defined.

Chapter 3, *Modules*, gives more details about the training structure, modules topics and learning specifications. At this stage, the modules themselves cannot be defined yet.

Chapter 4, *Materials*, presents the typologies of material and documentation to be utilised and produced during the training courses. Some suggestions are also made concerning the basic technical pre-knowledge required in order to attend the courses.

The various criteria adopted to evaluate the course results throughout the training activities are described in Chapter 5, *Success indicators*.

Finally, the ideology and structure of the promotional campaign of the training programme is defined in Chapter 6, *Planning*. This chapter will brief the relationship between dissemination and training, and how these two programmes can intertwine to benefit from each other.



1. Introduction

1.1 Overall Training Methodology

Two crucial targets need be addressed for training preparation: the definition of training structure and methodology and the development of training modules (Chapter 3).

The training activities contribute to the professional training of the involved actors.

The main characteristics of the PHAROS training courses are:

- Easy to start
- Possible integration between modules
- Focused feedback, materials and support
- Ideal for adult learning and professionals
- Customization of modules program and training design
- Rapid training for technical staff and users, if needed
- Provide ongoing guidance and support
- Provide step-by-step, time-tested materials.

It is essential to select a structure and a methodology that will be the most effective for its training environment considering factors such as:

- The overall training objective: what is expected to be achieved through training;
- Who needs to be trained: both in general, and any categorisation of trainees that would increase training effectiveness and economy;
- The expected learning outcomes: what each person trained is expected to be able to do, and expected to know, at different stages and at the conclusion of training;
- The scope of training methods, such as face-to-face intensive sessions, information briefings, provision of references or information materials, online available material and courses.

The training methodology consists of presentations, case studies, and work groups. All didactical activities foresee a theory session and a practice one, including discussions and problem solving exercises.

Finally, an assessment test and a user-satisfaction questionnaire will be distributed in order to evaluate the module's results and its success amongst trainees.

The programme of the training courses aims to provide:

- Competency to carry out effectively a range of operative activities within the framework of the PHAROS platform - not just to know about them
- A professional training component that integrates the study of technological developments with the implementation of innovation activities for the organisation of Audiovisual resources online
- An opportunity to develop skills and abilities for research communities and players of the audiovisual market
- Analytical and planning skills relevant to marketing and exploitation for online entertainment and journalism managers such as policy and decision makers working in TV stations, video productions, cinema, magazines, online publishing, etc.



At the end of a course, a PHAROS certificate of attendance will be distributed to all participants.

1.2 Training Objectives

The main objective is to support proper and trouble-free usage of the PHAROS components and framework for the technological actors (responsible for the system and service maintenance) and to help users of the PHAROS platform get the best out of its features and enjoy the full potential of PHAROS.

In order to give users, partners as well as members of the PHAROS Federation, the capability of using the PHAROS system, the training modules will be developed based on the assumption that the didactical modules will be carried out with project partners first, then the material will be re-used in training sessions with the PHAROS Federation members, accordingly adapted to the different needs of this audience.

Trainees should gain by the end of the courses a solid improvement – as a result of the learning activities – in problem solving and decision-making in several aspects related to the publishing, organisation and retrieval of audiovisual content online. Special attention will be paid to the importance of social and collaborative networks, and the ways these can prove beneficial for the purposes of content retrieval, organisation and recommendation.

1.3 Training provision

1.3.1 Face-to-face, e-Module/WBT (Web Based Training)

Training activities will be provided via a mixed approach including both traditional synchronous delivery (face to face) and asynchronous online courses. A range of training options is also foreseen to help the trainers begin a cost-effective learning program that suits the nature and needs of the different cultural organizations, research institutions or enterprises, which they belong to.

Different training audiences will call for different levels and styles of training, which will be considered when identifying teaching methods for individual courses. In the light of face-to-face courses, two levels of teaching can be envisioned:

1. *Large group training* – this will be a mixture of lectures and practical exercises, or 'break-out' groups. Large group training offers wider distributed market potential due to the number of places available, but in allowing this the method becomes less suitable for detailed practical courses. It is therefore envisaged that this approach will be used primarily for the more general and practitioner-level courses.
2. *Small hands-on group training* – this type of training will be primarily suited to more technical courses, which require a higher concentration of practical activities and thus benefit from a smaller number of participants. This will be the key training method used for PHAROS platform modules due to their technical nature. This type of training can be broken down into further subcategories:
 - Hands-on tutorials – structured practical exercises working alongside the trainer
 - Working examples – learning about a method or tool by applying aspects to a specific scenario
 - Learning by assistant application of technologies – actively applying the know-how, which has been instructed during the course itself.

1.3.2 e-Learning

The provision of e-Learning modules is also foreseen as a potential future evolution of the system.

Current specifications for e-Learning applications and services already encompassing most aspects of a standard e-Learning architecture (e.g. the IEEE LTSA, Learning Technologies Standard Architecture) and spanning from the description of learning objects meta-data based on shareable



XML-based data structures (e.g. through the IEEE LOM specification) to the assessment of user performances (e.g. through the IMS QTI, Question and Testing Interoperability Schemas) will be considered.

1.4 The PHAROS Summer School

During the last year of the project, a summer school will be organised. The summer school will involve members of the PHAROS Federation and will serve as a final PHAROS event to capitalise what has been done. It will ideally be a bridge between the funding and post-funding life of the project.

By the end of year 2, a summer school plan will start to be developed, taking into account project advancement as well as the success of the Federation in terms of members and their relevance within their respective markets.

1.5 Expected Results

The training courses are intended to provide an intensive and interdisciplinary sequence of lectures and seminars, as well as to investigate research and computing aspects of the PHAROS platform and relevant case studies.

At the end of the courses, participants should be able to:

- Use all the services offered by the PHAROS platform according to their specific needs and technical skills.
- Ensure an operative integration of the PHAROS components.
- Communicate an appreciation and understanding of the PHAROS services and the utility of disseminating the PHAROS platform to current users.



2. User Groups Selection

2.1 Analysis of User needs

The training activities that will be carried out within the PHAROS project address a wide spectrum of target groups. A core of training areas, addressing all target groups' needs, will be identified.

All partners will be invited to participate in the training courses.

In order to define a trainees group that is well balanced and suitable to fit a specific module, preparatory material will be realised in order to provide all the required information.

Before training takes place, all participants will receive a request to report, in general, what kind of technical support they will have at their disposal, and what they suppose will be the specific problems in the implementation of the PHAROS platform in their respective local system. More specifically, it will be important to know what are the trainees' expectations towards the training module they will attend, in order to improve the PHAROS training services and tailor them to specific needs.

All the information should be sent to the Training coordinator before the specific module takes place. This information will be analysed and the training courses will be finally adjusted according to the trainees expertise and expectations.

Suggested materials and guidelines will also be distributed a short time before the course; in addition to the agenda, the session time and other specific information (logistic info, list of teachers and participants, etc.) will be distributed.

2.2 Trainee user groups

The trainees will be selected according to different needs and the different basic requirements of the learners. The expected results and the skills to be transferred as a result of the training courses will also be different.

The planned modules will be articulated to fit three main trainee user groups:

- Developers & Administrators
- Users
- Managers and PHAROS Federation Members

Regarding the expected pre-knowledge to access to the training activities, initial requirements are given below:

Developers & Administrators modules

This programme welcomes well-qualified participants with technical backgrounds. This includes technical and content management operators, as well as content managers and operators that deal with the services provided by the infrastructure. This target group also includes Web administrators, technical people that will be responsible for the installation and maintenance of the PHAROS platform, in addition to content and metadata managers involved in the development of specific applications for the PHAROS platform.

Users modules

These modules are designed to be delivered to the PHAROS End-Users, qualified or general users of the PHAROS platform, in order to assure a correct usage of PHAROS and other specific applications. For example, it could be helpful to enable users to customize a set of personalized functions and



regarding their search environment, to create a local catalogue of their findings, to save search histories, etc.

Managers and PHAROS Federation member's modules

With respect to the Training oriented towards managers and PHAROS Federation members, we will emphasize the general benefits offered as a result of Members' staff attendance. This target group includes memory institutions managers, policy makers (Governmental officers, national/regional coordination bodies), content operators, educational and other experts in specific communication and valorisation sectors (e.g. journalism, entertainment). In particular, some of the suggested reasons for the promotion of training amongst Managers and Federation Members employees include:

1. Attainment of a good knowledge of the PHAROS infrastructure, services and specific application usage and maintenance, from different points of view (technical, management, or marketing)
2. Increased job satisfaction (career and professional development) and customer satisfaction
3. Increased efficiencies in content management and other inherent processes, resulting in financial gain and better visibility
4. Increased capacity to adopt new technologies and methods
5. Increased innovation in strategies and in sharing content
6. Exchange experiences and best practices

2.3 Trainers group

The trainers will be selected and recruited according to the varying expertise needed to attend each module. The PHAROS training modules draw primarily on the resources and staff of the PHAROS consortium. In the technical modules, research centres and universities will be primarily involved, in addition to government agencies and private societies. The showcase programmers would be the best trainers for introduction courses, as they have a direct experience with the integration of PHAROS components, and they will be able to provide good suggestions. The trainers from the platform and components WPs are likely to be more useful for advanced courses, in which more technical details will be presented. During the second edition, the trainers will be, whenever possible, augmented by representatives from the PHAROS Federation members as well. The trainers' CVs will be communicated to the trainees together with the program and other information on the courses.

The training will involve technical and specialised professional teachers able to train groups of technical operators and a large spectrum of target groups. The trainers will be well-experienced in the PHAROS project development, with special regards to image and sound processing, web services, database and application server maintenance, digital certificate authorities and PHAROS deployment.



3. Modules

3.1 Training Structure

The objective of training is to provide participants with the required knowledge and practice to use the PHAROS platform and components as needed.

3.1.1 Agenda

All modules foresee a specific agenda, in which the following actions will be taken into account:

- Welcome
- Presentation of the module, describing the aims and objectives of sessions
- Teachers, Trainers, and Trainees introducing themselves
- Development of the didactical sessions (a timetable will specify start time, end time and time breaks), with Theoretical and practical sessions as required by the topics being developed.
- Progress evaluation and discussion
- Assessment questionnaires
- Review of goal of the training course and user satisfaction test

3.1.2 Module design

After having evaluated the participants' curricula, each module program will be designed according to the capabilities and existing skills of the trainees. The know-how level of the classroom will affect the final definition of the module and the material that will be distributed.

The topics to be covered during training are:

1. Different levels of training will be dedicated to the infrastructural system. *Basic and Advanced PHAROS programming*, modules for technical operators and system developers, will take place along with *Basic and Advanced Content and metadata management*, with a target group represented by content managers and operators that deal with the services provided by the infrastructure. Expected outcomes: basic and advanced skills concerning image and audio processing; integration of PHAROS components into different platforms; programming of web applications using the PHAROS platform.
2. A set of modules is foreseen for the administrators of the PHAROS showcases. This is related to the application maintenance and development from a technological or a content management point of view and to the installation of PHAROS technologies and deployment of specific components for the implementation of specific applications. Expected outcomes: the acquisition of the basic skills for the installation, implementation and maintenance of services and applications.
3. A set of modules focused on specific applications usage will also be provided, including audiovisual content management, development and maintenance, from a curatorial managerial point of view. Expected outcomes: the attainment of the required skills for the use and maintenance of a PHAROS based application, in addition to the use of specific applications.



4. A set of modules aimed at training all those subjects that are engaged with the valorisation and exploitation policy of the PHAROS project is also foreseen. The target group of those modules is represented by: broadcasting institutions managers, policy makers (Governmental officers, national/regional coordination bodies), content operators, and journalists and other experts in specific sectors. Expected outcomes: basic skills for marketing and exploitation strategy in order to implement the business and exploitation model and define new ones.

3.2 Modules specification

The modules will be divided into three typologies:

- Developers Modules
- Administrators Modules
- Users Modules

Detailed description of training modules will be provided by all partners at the end of the second year of the project.

For homogeneity and consistency in the description of training modules, each module will be described with reference to a common template as shown below:

-----**Module description template**-----

<Module's Title>

Purpose:

Targeted trainee:

Partners Responsible:

Expected time scheduled:

Duration course:

Didactic methodologies:

Editions foresee:

Trainees expected pre-knowledge:

Maximum n° of Trainees for edition:

Trainers:

Materials to deliver BEFORE the course:

Materials to deliver AFTER the course:

Course content description

Table 3-1: Training module description template



4. Training Materials

4.1 Training Material Production

Initial training materials will include a training booklet, online materials and training programmes. Specific material foreseen for specific modules will be defined together with the definition of modules. There will be a variety of teaching methods and documentation required for efficient delivery of the event itself. The main aim of the training development task is to develop these methodologies and templates in order to ensure a high quality of training and supporting materials. The work package can, however, outline its primary considerations for the purpose of this document, which will then be designed and developed during task 5.3.2.

Once the course content has been finalized, trainers will be required to produce a range of course documentation to support the teaching. The course development task will design these templates. Further templates may be identified during the development task, the key materials defined by the workpackage as being essential to high quality delivery include:

- PowerPoint templates
 - regardless of the combination of teaching methods that are selected for a certain course, presentations and lectures will be inevitable. A structured template for presentations will therefore be essential. The workpackage will use the general presentation template produced by the project as a basis for its own designs.
- Presentation abstracts
 - each speaker will be required to produce a short abstract outlining the purpose and content of their session, for the benefit of attendees. A template for this information will be developed to ensure consistency across the courses.
- Worksheets
 - a variety of worksheets will be required to support training exercises, such as example scenarios, questions or handouts on key principles. The design task will work to produce templates for each of these types, which are structured in such a way that they are easy to complete, and that participants attending a number of courses will build up a set of compatible supporting documentation.
- Agenda and course programme templates
 - these templates will ensure that each course follows a similar structure, and allows adequate time for breaks as well as individual sessions.

PHAROS Use handbooks

- For the modules set, a related *booklet* will be edited in order to give all the references needed and to prepare trainees for the programme that will be developed. The handbook will provide details of aims, objectives, and content and assessment procedures for all modules. It will also give details on resources, procedures and regulations. The handbook will be published in PDF format, and it will be available at the project's public website, training section.
- A *Getting started guide* to the PHAROS functionalities and capabilities will be produced with non technical language in order to be useful for end-users as students, researchers, members of the public, etcetera.



- An *Illustrated PHAROS guide* will also be realised, with significantly more detail than the "Getting started guide". It will be targeted at content managers.

Papers of General Interest

- The distribution of information related to the PHAROS Project (articles from the technical press, articles coming from workshops or conferences, specific working documents, etc) is encouraged amongst participants.

Modules presentations and didactical material

- *Slides and other materials* will be provided for basic technology issues and for addressing users needs, providing additional information and a selected bibliography.
- *Code fragments* (or worked examples of the application of fragments of the PHAROS source code) might be useful for developers and disclosure will be considered according to the code's license owner.
- *Online materials* will also be available to the trainees.
- *CD-ROM* - All documents will be included in a CD-ROM to be distributed to all participants at the end of the training.



5. Success Indicators

5.1 Evaluation plan and success indicators

This task involves the definition of the evaluation criteria and how the success of the training will be measured.

An assessment questionnaire based on multiple choice questions will be developed, in order to evaluate what knowledge has been acquired through the course and the students' overall performance capacity. The assessment will take place during the last session of each module. The correct answers to the questions will be revealed at the end of the questionnaire session, followed by a group discussion.

It is preferable that the knowledge of staff undergoing training is assessed before they leave the training session. This could be a continuous assessment process during the session. A statistical analysis of trainees' final scores will be conducted at the end of each module.

A specific user satisfaction questionnaire will also be employed in order to check the understanding acquired by the participants. This will be especially useful during the first edition of training modules, in order to eventually correct and redesign in preparation for further editions.

Other training success indicators will include the following aspects: number of participants, assiduousness of participants, successful completion of all the training phases, and trainees satisfaction.

Tool	Success Indicators		Coverage
<p>Number of training participants per session</p> <p>The total number of training participants and the distribution amongst user partners and external partners indicate interest on project's results.</p>	Quantitative, Report	>85% of total available places	World wide, general and Specialised target
<p>Assiduity of trainees</p> <p>The assiduity of trainees indicates the perceived usefulness of training</p>	Quantitative, Report	>70% of training hours	World wide, general and Specialised target
<p>Successful completion of all training phases</p> <p>The successful completion of all training phases by the trainees indicates the perceived usefulness of the training as well as the quality of the training itself, of the trainers and of the choice of target pupils</p>	Quantitative, Report	>70% of trainees	World wide, general and Specialised target



6. Planning

6.1 Design and development

In this phase of the work the following activities will be realised:

- Definition of Training methodology and modules;
- Didactical content design;
- Realisation of promotional and informational materials;
- Recruitment of professional trainers and user trainers;
- Training groups selection (representative trainees of the PHAROS Federation) & registration.
- Definition of evaluation criteria

Initial training materials will include a training booklet, online materials and training programmes.

6.2 Calendar and duration

The exact dates of the training courses will be decided according to mutual engagements and organisational times, however they will take place in a period included between January 2009 and the end of the project.

The foreseen duration for each module is between 1 and 5 days, with the additional availability of remote assistance in the following months and periodical review by email. The language chosen for the carrying out of the training modules is English.

6.3 Training promotion

A section of the PHAROS website has been dedicated to training activities in order to inform interested parties on relevant information pertaining to developments within the training programme. The training section, found at www.pharos-audiovisual-search.eu will be also advertised on the homepage and consists of a page with general information and directions. One page for each training module will be posted with all the relevant information (to be published along with an online and a downloadable registration form).

6.3.1 Promotion of PHAROS Training Activities

The promotion of the training programme will be targeted to the widest possible audience in order to stimulate a proactive participation with both PHAROS internal and external actors to the consortium. PHAROS will identify specific target groups, and have a specified invitation process in order to properly recruit new members into the training programme. This will be done through the exploitation of existing marketing channels which have been established throughout the project so far.

Promotion of the training programme will be pursued in many different ways. The initial promotion will be made on the PHAROS public website. The section found at <http://www.pharos-audiovisual-search.eu/training> will feature a complete description of the overall programme and contact details; each course will be presented on a specific page using a schema consistent across all the courses; every specific course description will have a link to an online registration form to enrol in the course. Registrations and other information submitted through the online form will be automatically forwarded to the responsible partners for the overall training programme, for the specific course, and for the training platform.

A preliminary issue that needs to be addressed at an early stage, however, is what admissions policy



should be adopted. Communication channels and messages will vary in the case that previous membership in the PHAROS Federation will be required to take part in the PHAROS training programme, due to the exclusive nature of entry into the Federation.

In order to address this issue, the PHAROS training programme will be presented as a service to the PHAROS Federation; admission to training modules would therefore be dependent on the previous membership in the PHAROS Federation. Prospective trainees who are not Federation members would first need to apply for membership by submitting the appropriate registration services.

By joining the Federation, new members would have immediate access to the PHAROS website and CMS guide, including the training programme, and would be able to follow new developments and training events that are being offered. Members would be able to register into training courses and events online, by using the services offered directly within the project website. This option would be ideal for the entire project by increasing the influx of new registrations, further disseminating project information among new members, and maintaining contact with members after the formal end of training activities.

6.3.2 Dissemination of PHAROS Training Activities

The dissemination of PHAROS training activities will include sending direct invitations to Federation members and maintaining an up-to-date agenda and new announcements in relevant newsletters and media publications, advertisements at relevant events, and the distribution of professionally crafted dissemination materials (brochures, pamphlets, flyers, etc.). Consortium partners will be involved in the process and asked to provide relevant contact information for potential trainees.

Online information will play a vital role in the recruitment of new trainees. Beyond PHAROS' own communication channels, online sources such as: event calendars, online forums, discussion mailing lists and project mailing lists, magazines, and summaries will be researched to find suitable candidates.

6.3.3 Contribution of training activities to dissemination of PHAROS

The training programme will assist the validation and extension of project results and techniques. Training will catalyse the widespread diffusion of project solutions and help further establish PHAROS in the Audiovisual search domain by boosting the overall visibility of the project.

The results from the training modules will be beneficial to the project in several distinct ways. The attendees of these courses will become a body that will be instrumental in disseminating project results to diverse users in new professional environments. This group will be able to explain project methodologies and provide new users with background knowledge in complex system services and functionalities. This dissemination of technological proficiency will ideally have a domino effect on the further adoption of PHAROS services to new genres of users in diverse professional settings.

The PHAROS *road show* will play an essential role in the promotion of the training programme. The road show will consist of a series of workshops and events designed to extend the scope of dissemination efforts specifically towards SME and young researchers. These micro events will be conducted in locations throughout Europe to facilitate widespread international involvement. During this road show, a specific training session and workshop will be organized using training and dissemination material already prepared. The road show will be conducted in order to improve the dissemination and valorisation of project initiatives, and will present an ideal opportunity to raise awareness and promote both the PHAROS training programme as well as the PHAROS Summer School. Specific dissemination materials will be produced in order to promote training activity as well as provide interested parties with sufficient information as to how to become involved.



6.4 Training Main Milestones

Milestone n° 1 – Month 26
Training the technological actors for system and service maintenance. Training the users of the PHAROS platform: all the involved personnel and operators in Audiovisual content production and/or distribution, Journals, and research institutions already implied as participants in one of the applicative scenarios, or interested in taking part as members of the PHAROS Federation.
Main Results
<ul style="list-style-type: none"> ▪ Definition of target audience ▪ Description of methodologies and modalities of the training courses ▪ Provision of training materials ▪ Definition of different typologies of training sessions ▪ Trainers prerequisites and selection ▪ Definition of evaluation criteria and testing (customers satisfaction and skills testing) ▪ Analysis of training criteria
Milestone n° 2 – Month 30
First training modules, implementation and development perspectives
Main Results
<ul style="list-style-type: none"> ▪ Analysis of training results ▪ Training modules ▪ Full definition of different typologies of training sessions ▪ Definition of possible further development and implementation