Plan for DPC Workforce Development Activities

The DPC Planning Day in November 2013 considered issues of workforce development. This report makes three specific recommendations for actions tasks which will move the DPC’s current well-regarded but currently somewhat ad-hoc workforce development activities onto a more strategic footing in time for the start of the Coalition’s new strategic plan.

- Develop an enhanced framework to manage the DPC Leadership Programme and training events, providing greater clarity in relation to course selection, aims and outcomes.
- Establish a process for the accreditation of short courses on digital preservation allowing course providers to advertise that they are ‘endorsed by the DPC’ or similar.
- Define a template for the creation of portfolios that can underpin continuing professional development for digital preservation practitioners and establish an infrastructure for supporting this process within the DPC and its members.

The report of the planning day has been circulated to the whole DPC membership seeking views on the actions that follow.

The Board is invited to discuss and review these items, described in more detail below, providing feedback on proposals and approval for their inclusion in the DPC work plan. The Board is invited to prioritize these three items in the event that undertaking them concurrently would require more capacity than presently available. The enhanced framework to manage the Leadership Programme might be the simplest and most easily initiated of the three.

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1. Introduction
DPC members have increasingly identified workforce development as a topic of concern: How can relevant training courses offering quality content be identified? How can employers and digital preservation practitioners structure continuing professional development in a meaningful way? With
these and similar questions in mind there has been indicated a desire for the DPC to facilitate work in this area. This need is well timed with both the APARSEN and DigCurV projects having produced outputs to support such endeavours, in particular a gap analysis of training provision versus need and a skills framework respectively.

In light of these developments it was decided that the DPC’s 2013 Planning Day should focus on issues surrounding the topic with an aim to identifying potential priorities for DPC work in this area. Presentations on the day provided context in relation to the issues before attendees were asked to discuss three topics in more detail: Formal Qualifications, Course Accreditation and Professional Portfolios. A full report from the day can be found below in Section Two.

Based on the outcomes of the Planning Day, Section Three sets out recommendations on how to take this work forward. The board is asked to consider and approve the plans set out there and to consider how these should be prioritized over the coming year.

2. Report from DPC Planning Day

The 2013 DPC Planning day was held at the Institute for Mechanical Engineers, Birdcage Walk, London on 29th November 2013. The following report was prepared by Caroline Peach with additional content from William Kilbride and Ed Pinsent.

2.1 Introduction

This report summarises the 2013 Digital Preservation Coalition (DPC) Planning Day, which was themed around digital preservation workforce development. It outlines DPC’s current workforce development activities, provides an overview of recent research initiatives as presented at the planning day, and uses content from the subsequent discussion sessions to consider how DPC’s work along three identified strands of formal qualifications and curriculum design, accreditation of short courses, and the development of professional portfolios could be developed to support the achievement of DPC’s strategic objectives.

2.2 Context

Participants at the planning day were provided with context in the form of a comprehensive briefing note from the Executive Director, William Kilbride. An extract from this document, setting out DPC’s strategic objectives with respect to workforce development, is reproduced below.

“The DPC Strategic Plan 2012-15 commits the Coalition to the high level strategic objective of ‘workforce development’. The strategic objective is described as follows, ‘...the DPC will facilitate the development of a workforce with the skills and tools necessary to ensure long-term access to digital collections and will encourage the proliferation and diversity of training necessary to that purpose. It will provide tangible benefits to members in the form of training and will support those who provide quality-assured training in digital preservation which is relevant to the needs of members’ workforces. It will support those colleges and universities which seek to develop curricula in digital preservation and provide authoritative labour market intelligence for employers, students and teachers alike.’

Workforce development is further supported by a second strategic objective about ‘Assurance and practice’. This includes a range of actions including, ‘Enhancing and providing mechanisms to accredit digital preservation training courses and
practitioners’ which is described in specific terms: ‘DPC will provide free online access to course materials derived from the TIMBUS and APARSEN projects. We will publish explicit criteria to govern the allocation of funds from the DPC Leadership Programme making this a de-facto quality stamp.’ ”

The briefing paper summarized DPC’s extensive experience of a wide range of workforce development activities. Since 2009 these have taken six forms:

1. Introductory training and awareness events ‘Getting started in digital preservation’.
2. Grants to attend programmes such as DPTP, Digital Futures Academy, APARSEN advanced practitioner events, ‘Digital Preservation the PLANETS way’ and ‘How to set up and run a data service’.
3. Support to externally funded projects including DATUM, TIMBUS, APARSEN, SPRUCE and 4C.
4. An annual student conference.
5. A positive but responsive attitude to giving lectures as part of higher education courses.

The popularity of these offers, the evolution of digital preservation as an area of professional activity, and DPC’s involvement in two recent research projects (APARSEN and DigCurV) provide the impetus for a review of existing activities and the opportunity for DPC to:

- Better align existing activities to strategic objectives;
- Deliver enhanced benefit to members;
- Improve transparency and efficiency of workforce development activities;
- Review and develop activities in line with evolving professional needs.

The 22 participants at the planning day came from 17 organisations which included higher education institutions, a professional body, and cultural heritage organisations. They were tasked with three specific actions:

- To review, discuss and where appropriate endorse recommendations on formal qualifications in higher education in digital preservation emerging from recent work in the APARSEN project.
- To review and update processes associated with the provision of grants for training from the DPC Leadership Programme in the light of practical experience and emerging findings of the DigCurV project on vocational education.
- To review, discuss and where appropriate endorse proposals for the development of a professional portfolio of on-going career and professional development for those working in digital preservation.

In addition to the background provided in the briefing paper, three presentations on APARSEN, DigCurV and the DPC’s Leadership Programme, provided further insight into these pieces of work and acted as a stimulus for the afternoon discussion sessions.

2.2.1 APARSEN: Formal Qualifications in Digital Preservation

APARSEN is a network of excellence, working together to build a virtual centre of excellence for digital preservation (www.alliancepermanentaccess.org/index.php/aparsen/). The multi-faceted EU-funded project includes a work package on formal qualifications. FTK (Forschungsinstitut für Telekommunikation und Kooperation) has carried out a substantial review of formal qualifications available in digital preservation covering academic courses and vocational life long learning, for undergraduates, graduates and practitioners. DPC has contributed to the project by reviewing training needs and providing career development training opportunities. Through participation at the
DPC planning day, FTK hopes to get further information about the demand side of digital preservation workforce development.

The recommendations which have emerged from the research are:

- **Harmonization of terminology:** There should be a shared, standardized vocabulary for the description of curricula and courses. Building on the APARSEN glossary, the core topics and themes, but also sectors and target audiences, should be harmonized, thus facilitating the assessment of contents and coverage.

- **Structured descriptions of opportunities:** The joint reporting form adopted by APARSEN for training courses could be used as a baseline template for structured capture of information about DP curricula and courses. This holds especially true for credits/qualifications earned, requirements and learning objectives.

- **Specification of competence profiles:** From the analyses it appears that DP is lacking generally accepted competence/job profiles for formal qualifications. Hence it is necessary to clearly define the market impact within specific sectors of the qualifications obtained.

- **Design of curricula beyond library/information science communities:** While Digital Preservation is established within library/information science communities there was little evidence about DP subjects being taught in other, related scientific and professional disciplines. To further broaden the scope of formal qualifications in Digital Preservation curricula for other disciplines should be developed.

- **Establishment of cooperative dialogue between stakeholders:** To overcome fragmentation and harmonize the description of offerings an open dialogue with stakeholders from within (and outside) the EU needs to be established. Besides contacting the providers of the courses/curricula analysed, synergies with related initiatives should be exploited.

- **Setup of registry for formal qualification opportunities:** Specific descriptions of curricula and courses should be freely available and accessible online. This would require the delivery of required information by the providers of formal qualification opportunities.

  (Taken from Kilbride, 2013)

2.2.2 DigCurV: A Curriculum Framework for Digital Curation

www.digcurv.gla.ac.uk

The DigCurV project has developed a curriculum framework which allows the identification, evaluation and planning of training to meet the skills development needs of staff engaged in digital curation in the cultural heritage sector. Based on extensive international research, the project has investigated what is required (key skills and competences) alongside what is available (existing training opportunities, including the development of a training registry).

The project recognizes that digital curation is a complex and evolving field that is both interdisciplinary in nature and practice. The Framework which has been developed is descriptive rather than prescriptive, and the creators envisage it being used as a checklist by those developing curricula.

The Framework identifies four ‘domains’ encompassing technical and generic (project/professional) knowledge each of which is divided into ‘subdomains’, which are in turn further divided into ‘skills’. Practitioners can display three different levels of competence with respect to any skill. Basic, being described as ‘is aware of’; intermediate as ‘understands’; and advanced as ‘is able to’.

To enhance the application of the Framework each of the skills is viewed through three lenses which correspond to different groups of staff (practitioner, manager, executive) in recognition of the fact
that people will require varying levels of competence in the different skills according to their role. This approach is well illustrated by diagrams provided for each lens:
Manager lens – www.digcurv.gla.ac.uk/assets/downloads/dcsf_manager_lens.pdf

2.2.3 DPC Leadership Programme and Career Development
DPC currently delivers against the workforce development strategic objective through its annual student conference, the introductory ‘Getting started in digital preservation’ events, by providing grants for members to attend training programmes, and through invitational lectures and seminars. It also arranges specialist briefing days which are themed to meet members needs, works with others to deliver project training events, produces technology watch reports (again, driven by member needs) and maintains a series of other resources including the Digital Preservation Handbook, Occasional Papers, the Business Case Toolkit and disseminates information through a range of media including the online publication of the large number of presentations given at events.

Whilst these activities are popular and well regarded, several areas of potential improvement have been identified by DPC. These include:

• Introducing defined processes to identify which courses DPC will provide grants to members to attend.
• Better assessment of the impact of activities (beyond existing event evaluation forms).
• The ability for individuals to measure progress in their development through attendance at multiple events or use of other connected resources.
• Better integration with other agencies.
• Better integration with Higher Education providers and students.

2.3 Discussion groups
Participants at the planning day were allocated to one of three discussion groups on the themes formal qualifications in higher education, accreditation of short courses and training, and professional portfolios and career development. Each group was asked to consider the actions DPC might take to progress the activity with a view to informing the strategic plan from 2015 onwards.

2.4 Formal qualifications in higher education
Participants at the planning day were invited to:

• review, discuss and where appropriate endorse the outcomes of the survey;
• articulate their needs and expectations of formal qualifications.

The discussion session revealed that there is no specific work to harmonise the description of curricula and courses in the UK. In terms of content, it was felt that the topical areas addressed by the APARSEN research and training did not formally map to areas of academia in the UK. There was broad support for agreement on the essential components to be taught as part of formal qualifications, and recognition that these would need to be relevant to both the library and archive arenas. It was suggested that the APARSEN training and curricula proposals be compared with what is already provided by UK higher education providers to see whether an approach more closely aligned to academia can be adopted.

The extent to which there could be a full and open dialogue between higher education training providers was questioned. Whilst there is individual willingness to share knowledge for the benefit of
the community, this is constrained by the parent organisation’s need to receive a financial return on their offer. Hence a competitive tension exists between institutions, wanting to protect the materials they have developed and retain their ability to attract students and researchers.

In terms of the accreditation of formal qualifications, it was agreed that there is no recognized (appropriate) framework currently available. Questions were raised about which organization would be the right organization to accredit Digital Preservation offers, and about the relevance of accreditation within the professional context of its application, i.e. how relevant would a qualification from an accredited digital preservation course be when applying for jobs in the library and information science field, for example. Although it was agreed that existing professional frameworks such as those used by CILIP and ARA were not specific to the needs of a digital preservation professional, it was thought that there would be significant benefit in looking at these frameworks closely, not least to ensure that there is an understanding of how digital preservation competences map against these frameworks.

The breakout group’s suggested actions are to form a working group and to ensure that the work of the group aligns closely with the work undertaken to consider the development of professional portfolios.

Next steps:
Useful progress was made at the planning day in terms of testing the appetite for subject-specialist accreditation and validation of degree programmes and it is hoped that this will inform the APARSEN project, with which DPC will continue to maintain its close involvement.

If DPC were to take forward this activity and act as an accrediting organization for higher education qualifications it would need a better understanding of the wider landscape for accreditation of such qualifications, the value placed on accreditation by qualification providers and recipients, costed options for running a system of accreditation and a risk assessment of working as an accrediting organization.

To achieve DPC could form a working group which includes representation from: DPC staff, higher education course providers, allied professional associations, recent graduates, employers.

The remit of the working group could include:
- Review of the professional frameworks of allied organisations including CILIP, ARA, BCS, IRMS, ARMA to consider how an accredited formal qualification in digital preservation would map against the skills and competences of existing professional associations.
- Agree essential criteria and a model curriculum for Digital Preservation based on existing published work (e.g. APARSEN and DigCurV) which fits with academic structures. Ensure that the criteria can also be used by the initiatives on short course accreditation and personal portfolio development.
- Review the processes and criteria used by allied organisations to accredit qualifications in higher education (e.g. CILIP, ARA, BCS).
- Engage with appropriate sector skills councils as part of positioning work.
- Consider the resources required to accredit qualifications in higher education and produce costed options for operating an accreditation system.
- Undertake a full risk assessment of DPC positioning itself as an accrediting body.

Resources:
Membership of the working group would be voluntary but to ensure that the group is able to deliver against its remit, it would need an effective coordinator with sufficient time available to lead (and chase) progress. The coordinator role could be resourced by a member of DPC staff, by a member of the working group with sufficient time available, or by an external consultant.

The working group would need to commit to three meetings over the course of a year, with interim work by email. The first meeting would agree the remit and allocate tasks and timescales for delivery, the second would check progress and air issues arising, the final meeting would be to agree the recommendations to be made to the DPC Board.

Alternatively, the work of the working group could be carried out by a consultant, interviewing nominated representatives from DPC staff, higher education course providers, allied professional associations, recent graduates, and employers. The advantage of this is likely to be that the work could be carried out over a shorter period of time. This disadvantages are that it would be at greater expense, it doesn’t capitalize to the same extent on DPC’s successful track record of members working in coalition, and it is likely that the stakeholders would not be as closely engaged with the work, potentially limiting its successful roll-out.

2.5 Accreditation of short courses and training

The question posed to the breakout group at the planning day is whether DPC, based on the needs of its Leadership Programme to be more transparent and better at signposting candidates to the right training, might be able to adapt the DigCurV Framework as an explicit method to assess and where appropriate, give some accreditation to relevant training courses.

The group had a productive discussion which included listing criteria for accreditation, identifying the benefits of accrediting courses, proposing a series of actions to establish an accreditation system and outlining a method of operation and options for future development.

Criteria for course accreditation

The list of criteria for course accreditation, is as follows:

1. The course must be aligned with current models, standards and examples of best practice in digital preservation.
2. The course must include case studies showing execution and use of DP standards, software, tools etc.
3. The course must be current, up to date and relevant.
4. The course must be taught by competent teachers.
5. The course must have built-in feedback mechanisms between teachers and students.
6. The teaching methods used must be consistent with the type of material.
7. The course must be clear about its intended audience.
8. It must be possible to align the course within the DigCurV Framework.

Benefits:
The group discussed the benefits of having an accreditation system for short courses and training. These include benefits beyond those for DPC in terms of improving the operation of the Leadership Programme.

For courses: they can badge themselves with a ‘DPC approved’ sign; it adds credibility (though this is hard to measure); not all courses will be DPC approved.
For DPC: it makes the current ‘intuitive’ arrangement of which courses to support via the Leadership Programme more formal and transparent.
For students: it helps them to pick the right / best quality course, and build a career path. This is increasingly difficult as the number of courses and training opportunities grows.

For employers: it helps them to select good digital preservation practitioners, because the quality of courses attended is understood.

Actions:
To establish a system for accrediting training and short courses, the group proposed the following actions, based on knowledge of how other organisations such as BCS and ARA operate similar systems:

1. Convene a small group to define and own the criteria above.
   Membership of the group would include the BCS, DPC members, course providers, and Laura Molloy (DigCurV) to ensure stakeholder interests are addressed and to benefit from wider experience.
   The group will ultimately become the accreditation panel.

2. Circulate the criteria to training courses (including the UKDA course, Digital Futures Academy, 3TU, DPTP and others).

3. Gain acceptance for the criteria, sign them off, and publish them.

Operation:
To help with effective audits, DPC would fund attendance to a course for auditing purposes. The accreditation criteria would become a ‘report card’ template and the report would form the basis for the accreditation decision.

The accreditation process would be renewed regularly, for example after a period of five years, or triggered by a substantial change to the format of a course.

The criteria, once signed off, will be published and have a shelf life; the panel would reconvene to update them periodically.

In terms of measuring the quality of a course, the group agreed that there should be at least two scales, the first measuring the volume and range of content, and the second measuring the quality of the content.

Resources:
Accreditation is something that DPC wants to encourage, but it is not cheap to implement and it is therefore likely that DPC would have to raise a charge for accreditation. Even if assessors work in a voluntary capacity, amongst the costs to be considered are the funding of attendance at courses for audit purposes and administrative support from DPC staff.

If a charge is to be levied to courses, in return the accreditation needs to prove some sort of market value (i.e. be something that employers or courses will pay for), and attract students to courses.

Whilst some benefits have already been identified, the establishment of an accreditation system would therefore also need to be accompanied by a programme of advocacy.

Future developments:
Considered by the breakout group as a future development, the DigCurV Framework could be used to fine-tune the way in which accreditation is used by enabling elements of courses to be aligned with the three DigCurV lenses (Executive, Management, Practitioner). The Framework would not be used to prescribe core DP competences, but would help students to pick the course most appropriate to their needs.

Once use of the Framework becomes established, it could be used to identify gaps in training provision, with help of the work started by APARSEN.
The group also considered how credits could be assigned to core course elements, and how the DigCurV lenses could assist with this. Credit points could be redeemed against categories of DPC membership, leading to a shift in DPC’s membership structure and subscription model to one that is based more around skilled individuals than organizations.

Next steps:
Many of the steps outlined in the section on accrediting higher education qualifications would also be of benefit to the accreditation of short courses, particularly the production of costed proposals once the outline of the accreditation process has been agreed in principle. A risk assessment should also be undertaken to gain a thorough understanding of the resources required to operate such a scheme, paying particular attention to the amount of voluntary effort which would be involved and whether this is sustainable over the long-term, and analyzing other efforts to accredit short courses such as the recently discontinued CILIP Seal of Approval.

Although not discussed at the planning day, an alternative use of the DigCurV Framework could include a stronger requirement for mapping by the course provider to the DigCurV framework as part of the accreditation criteria. Although more time-consuming for course providers at the outset, the benefit of this would be greater clarity over course content and intended audience, a much easier and more transparent method of comparison and assessment for DPC, a more distributed workload in terms of applying the DigCurV framework to course content, and earlier realization of the benefit of enabling students to pick appropriate courses as mentioned above.

Most systems for accrediting courses map to an identified skills and knowledge framework, the primary purpose of which is to support individual professional development (ARA, CILIP, BCS). The framework is then referenced throughout the organisation’s professional development activities such as personal accreditation and course accreditation. It is important that DPC has confidence in the DigCurV Framework if it is to be used as the skills and knowledge framework for Digital Preservation as all other workforce development activities will ultimately need to make reference to it. Although it is an explicit goal of DigCurV that the Framework be used to evaluate training programmes, it would be useful for DPC to work with a selection of short course / training providers to map their offers to the Framework to assess the feasibility of using it as part of an accreditation process.

2.6 Professional portfolios and career development
The proposal that DPC should support the development of a new profession has existed since the 2006 report ‘Mind the Gap’. Whilst the creation of a ‘digital preservation’ professional body could create barriers to participation, create friction with existing professional bodies, and require more resource than DPC can afford, there are ways in which DPC can provide additional benefit to its member organisations through activities linked to individual professional development.

The third discussion group was invited to consider the possibilities that exist to provide a professional portfolio services for members, and moreover to consider what other options may be possible to support individual career development.

DPC’s interest in this area stems from a desire to deliver more benefit to members from the long-established member-only briefing days, and anecdotal reports of the difficulties of identifying people with practical digital preservation skills during recruitment exercises. The issue at the heart of both of these challenges is how to evaluate skills and experience gained in a multitude of different ways - be it for the purpose of building individual professional development or for assessing the professional skills of an individual.
DPC has run member-only briefing days from the outset. These are themed according to member needs and have a close relationship to technology watch reports in that both address emerging issues which are not covered by other training providers. Because of the wide variety of topics covered they tend to happen in isolation and there is limited capacity for members to build on their attendance because of the apparent lack of connection between events. A system of recording attendance at events such as the member-only briefing days alongside other professional development activities could help individuals to build their professional knowledge systematically and identify, and address, gaps.

A professional portfolio would be a record of activities undertaken to support personal professional development. Whilst there is nothing to stop individuals from compiling this information anyway, the group discussed the advantages of DPC providing a service with a structure within which individuals could record activities, potentially linked to the DigCurV Framework.

The group identified how three different groups of stakeholders might want to use a professional portfolio service.

**Individuals:**
- To collate information on all professional development activities.
- To record topics covered and identify gaps in skills and knowledge.
- To identify career development needs and to be able to match these to providers of courses or other professional development activities.
- To compare the skills covered by different qualifications and courses.
- To map skills to job profiles.
- An unbiased third party validating professional proficiency.

**Employers:**
- To map skills to job profiles.
- To aid with recruitment.
- To help with the creation of new job profiles and the skills required.
- To enable some standardization of job profiles.
- To compare the skills of people with different professional backgrounds.
- To support the identification of professional development opportunities.

**DPC:**
- To enable members to build links between workforce development activities.
- To gain better workforce intelligence.
- To demonstrate the development of a growing, and increasingly skilled digital preservation workforce.
- To enable career progression in an emerging field.

Many of these uses require the ability to compare professional experience built up through different routes. Indeed, this is one of the significant challenges faced by intermediate to advanced digital preservation practitioners, and those seeking to recruit them. How does one equate experience gained in different contexts, and how can one be confident that it will translate to a different role?

The group discussed incorporating the DigCurV Framework into a professional portfolio service. Individuals could use the Framework to map the skills and competence they have derived from the different professional development activities they have undertaken. They would be able to view their
individual portfolio of skills against the wider DigCurV Framework and identify areas for development, either to better undertake their current role, or to progress to a different role.

Subject of course to data protection issues, the group discussed sharing information within and between organisations, and the benefit of being able to associate roles with the skills profiles of people already in a job. This would help with both recruitment (identifying the skills needed and the experience that translates to these skills), and individual staff development. Being able to view skills across a team within an organization could help an organisation’s ability to build a strong multi-skilled team.

In addition to providing the mechanism for the portfolio service, DPC’s role would be to advocate that course providers should map their courses to the Framework, and include them in the central registry (set up by DigCurV) so that individuals can readily identify courses and other activities which fulfill their development needs. There was discussion too of the value to individuals of being able to identify attendance on accredited courses, and being able to identify whether courses were pitched at basic, intermediate or advanced level.

There was some discussion about individual professional accreditation, but little appetite for DPC to pursue it at this stage because of DPC’s membership structure (focused on organisations rather than individuals), the resource that would be required, the time and expense for individuals to undertake the process, and the perception that it would create barriers which are unhelpful in a multidisciplinary field.

What might a professional portfolio service look like?
A secure, online service which includes:
- Records of attendance at DPC events with links to summaries of the event (including skills covered and practitioner level).
- A deposit box to which people can scan and upload certificates.
- A toolkit to identify and map personal skills against the DigCurV Framework.
- Access to an online course registry in which courses are mapped to the DigCurV Framework, to include accredited and non-accredited offers, and with the facility for past attendees to record comments.
- Model CVs and job descriptions (identifying skills) associated with specific roles.

Participants were also prompted with a list of other activities which DPC could undertake to support career development, including:
- Offer ‘certificates of attendance’ at DPC events
- Give a certain number of ‘points’ or ‘badges’ to different types of events and allow members to accumulate points or badges on an ongoing basis.
- Track attendance at DPC events
- Allow members to record online a portfolio of practical digital preservation activities
- Allow members to state their own career development needs
- Allow members to report relevant ‘community engagement’ activities such as participation in standards development, conference papers, guest lectures
- Allow members to record attendance at DPC-approved training
• Allow members to record attendance at other relevant events and training.

Many of these are addressed by the portfolio service envisaged by the group. There are some quick wins which the group thought would be valuable to members and help people to start to think about and record their professional development. These are the issuing of certificates of attendance, and identifying the practitioner level of events (e.g. I attended a DPC advanced practitioner event on...).

Next steps:
• Implement quick wins: certificates for attendance at events and identify audience levels for events.
• Defining the skills and knowledge framework based on DigCurV.
• Develop a toolkit or guidance to enable individuals to map their skills to the DigCurV Framework.
• Encourage DPC member organisations to select job profiles and map them to the skills framework, sharing the information for the benefit of other members.
• Develop events or online learning to support individuals with their development of professional portfolios.
• Advocate the use of professional portfolios to member organisations.

• Form a task and finish group to work with DPC staff and/or consultants to investigate the delivery of a professional portfolio service, remit to include:
  o Researching how similar organizations deliver portfolios services (e.g. CILIP, SALT, BCS, ARMA) and how well used the services are.
  o Considering the impact on DPC as an organization if it increases services to individuals, and its relationship with allied professional bodies such as ARA and CILIP.
  o Considering the proliferation of professional qualifications and accreditations being developed by allied professional bodies and how this affects an individual developing digital preservation skills. In particular, whether an individual is likely to be a member of a professional body with a skills framework that is different to the skills framework adopted/developed by DPC.
  o Considering how easy it is to adapt existing DPC registration processes to track individual attendance at events and what modifications would be necessary to enable this to happen, and at what cost.
  o Working in collaboration with DigCurV to seek funding to map courses submitted to the online course register to the skills framework, and to develop the register so that this information is available to potential students.
  o Scoping the technology required to deliver the portfolio service online and its cost.

2.7 Summary
DPC has an extensive and well-regarded set of workforce development activities, many of which are long established. The recent developments of the APARSEN and DigCurV projects present the opportunity to draw these initiatives together in a more cohesive manner which will enable members to build links between the activities of DPC, external course providers (higher education and short courses), personal career development, and the needs of digital preservation teams within organisations.

Central to progressing all of this activity is the adoption of a skills and knowledge framework for digital preservation. DigCurV has developed a Framework which, if DPC is confident meets community expectations, will provide a structure and strategic coherence against which all of these
activities can be taken forward. In the short-term the course accreditation and personal portfolio activities are most likely to be achievable within DPC resources and bring both member and community benefit. The first thing to establish, therefore, is the robustness of the Framework for application to short course accreditation and career development. DPC could pilot these applications, drawing on a willing group of volunteers, and use the results to work with DigCurV to fine-tune the Framework if necessary. Once confidence in the Framework has been established, plans can be developed to take forward short course accreditation and the development of a professional portfolio service.

While these larger projects are scoped, costed and risk assessments are carried out, smaller in-house activities could be undertaken to support members with on-going career development such as the issuing of certificates of attendance at events, clarifying the skills covered by events and their target audience (level of expertise), and developing guidance and/or events (face-to-face or online) to support the mapping of skills to the skills Framework (assuming it is adopted).

The final area to consider is the relationship of DPC with the professional bodies which represent individual members of the digital preservation workforce. It would be useful to involve allied professional bodies in discussions about the adoption of a skills and knowledge framework focused on digital preservation, both to benefit from their experience of development and application, but also to ensure that the resulting framework sits comfortably alongside those used by the professional bodies of which DPC members may also be members.

3. Plan for Workforce Development

Based on the outcomes of November’s planning day it is recommended that the DPC move forward with three pieces of work in relation to workforce development. These are:

- Develop an enhanced framework to manage the DPC Leadership Programme and training events, providing greater clarity in relation to course selection, aims and outcomes.
- Establish a process for the accreditation of short courses on digital preservation allowing course providers to advertise that they are ‘endorsed by the DPC’ or similar.
- Define a template for the creation of portfolios that can underpin continuing professional development for digital preservation practitioners and establish an infrastructure for supporting this process within the DPC and its members.

The board is invited to consider these items, as described in more detail below, providing feedback on proposals and approval for their inclusion in the DPC work plan. If approved the board is asked to prioritise these proposals as there is not capacity to undertake them all concurrently. The enhanced framework to manage the Leadership Programme might be the simplest and most easily initiated of the three.

3.1 Framework for DPC Events and Leadership Programme

The DPC’s Leadership Programme is currently managed on an ad hoc basis as potential training opportunities arise. This work would look to achieve some of the ‘quick wins’ described in the planning day report whilst also bringing greater transparency and structure to current DPC training-related offerings, including clarity for the requirements on those involved, timescales and decision making processes.

Tasks:
- Create template certificates for distribution to attendees at DPC events
• Create a new template and process for advertising DPC events that will link aims and outcomes to the DigCurV skills framework, will clearly identify intended audiences and provide guidance on appropriate communication channels.
• Document the processes for decision making in relation to the Leadership Programme, including:
  o Preparation of a yearly plan for the Leadership Programme including budget and training priorities for members
  o An approval matrix, which references the DigCurV skills framework, for courses wishing to offer sponsored places via the DPC Leadership programme (a precursor to course accreditation)
  o A documented process and decision matrix for managing applications for training course grants.

**Proposed Schedule:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr 2014</td>
<td>Create certificate template</td>
</tr>
<tr>
<td>Apr – May 2014</td>
<td>Develop new processes and templates for DPC events and begin implementation</td>
</tr>
<tr>
<td>Jun – Aug 2014</td>
<td>Draft proposed new processes for management of DPC Leadership Programme and a plan for grants to be offered in 2014-15 including consultation with members via a training needs survey and discussion at the Directors Group</td>
</tr>
<tr>
<td>Sep 2014</td>
<td>Present proposed processes and plan for Leadership Programme to board for approval</td>
</tr>
<tr>
<td>Sep 2014– Feb 2015</td>
<td>Trial processes</td>
</tr>
<tr>
<td>Mar 2015</td>
<td>Review processes, make final proposals to board</td>
</tr>
<tr>
<td>Apr 2015 onwards</td>
<td>Final Leadership Programme processes in place</td>
</tr>
</tbody>
</table>

**3.2 Short Course Accreditation Pilot**

Members of the DPC have expressed an interest in the creation of a short course accreditation scheme as a means to support both course providers and those looking to identify relevant training. Such a scheme could also be used to underpin the selection of courses to be supported by the Leadership programme and to help validate contents of professional development portfolios. At the Planning Day it was agreed the DigCurV skills framework would be a useful tool for course accreditation and, with this in mind, 8 criteria were agreed on with to base an accreditation scheme.

If taken forward, this programme of work would see the creation of a working group of selected stakeholders (including course providers and consumers) that would develop a framework for an accreditation scheme and carry out a short pilot. This would include research into similar schemes, stakeholder consultation, and consideration of its ongoing sustainability. Based on this pilot the working group would report to the board the outcome and recommendations for the launch of a DPC short course accreditation scheme.

**Tasks:**

• Write terms of reference for working group
• Select members for working group and organise meetings
• Investigate existing accreditation schemes
• Consult with course providers
• Carry out risk assessment and estimate costs
• Draft framework for assessment based on
- Carry-out test assessment
- Prepare report for the board with recommendations

**Proposed Schedule:**

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 1</td>
<td>Identify members for working group, write terms of reference</td>
</tr>
<tr>
<td>Month 2</td>
<td>First meeting of working group: agree work plan and allocation of tasks</td>
</tr>
<tr>
<td></td>
<td>(investigation of existing schemes, course provider consultation, risk</td>
</tr>
<tr>
<td></td>
<td>assessment, costings, drafting framework)</td>
</tr>
<tr>
<td>Month 3-5</td>
<td>Carry out assigned tasks</td>
</tr>
<tr>
<td>Month 6</td>
<td>Second meeting of work group: Review findings, finalise draft framework</td>
</tr>
<tr>
<td>Month 7-8</td>
<td>Assessment test case and feedback, prepare report and final recommendations for accreditation scheme</td>
</tr>
<tr>
<td>Next board</td>
<td>Present findings to board and make recommendations for DPC accreditation</td>
</tr>
<tr>
<td>meeting after Month 8</td>
<td></td>
</tr>
</tbody>
</table>

**3.3 Professional Portfolios Pilot**

DPC members have identified the need for a structured framework for the continuing professional development of digital preservation practitioners, as many have found existing schemes do not meet their needs. Such a framework support individual development as well as helping employers to identify potential skills gaps within their organisation whilst also facilitating processes such as staff review. The planning day identified the DigCurV framework as a potential basis for this work whilst also drawing from the experience of those participating in existing schemes.

This programme of work would take forward the outcomes of the planning day through the creation of a working group consisting of selected stakeholders from within the DPC membership, including practitioners and those in a line management role. The group would be tasked with assessing the current landscape, assessing sustainability and developing a proposal including processes and documentation. Volunteers would then be sought for a short pilot programme, testing the validity of the framework and its potential for practical application. Results from the pilot would then be reviewed and a proposal for a full scheme drafted and presented to the board.

**Tasks:**
- Write terms of reference for working group
- Select members for working group and organise meetings
- Consult with relevant professional bodies on existing CPD schemes (e.g. CILIP, ARA)
- Identify stakeholders needs (including member survey)
- Carry out risk assessment and identify costs
- Draft framework proposal, including necessary documentation
- Circulate for comment and review as required
- Identify pilot test cases and trial process
- Prepare report on pilot and proposal for extended scheme

**Proposed Schedule:**

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity</th>
</tr>
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<tbody>
<tr>
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<td>First meeting of working group: agree work plan and allocation of tasks</td>
</tr>
<tr>
<td></td>
<td>(investigation of existing schemes, stakeholder consultation, risk</td>
</tr>
<tr>
<td></td>
<td>assessment, ...)</td>
</tr>
<tr>
<td>Month 3-6</td>
<td>Carry out assigned tasks</td>
</tr>
<tr>
<td>Month 7</td>
<td>Second meeting of work group: Review findings, solidify draft framework and documentation</td>
</tr>
<tr>
<td>Month 8</td>
<td>Circulate for wider comment and review as required</td>
</tr>
<tr>
<td>Month 9-11</td>
<td>Carry out pilot test cases and gather feedback, prepare report and final recommendations for portfolio scheme</td>
</tr>
<tr>
<td>Next board meeting after Month 11</td>
<td>Present findings to board and make recommendations for DPC accreditation scheme</td>
</tr>
</tbody>
</table>