OhioLINK EAD Task Force  
Training Program Ideas  
(Notes taken, 11/06/07, C. Gilgenbach)

**A. Support and funding for training:**

OhioLINK might possibly be able to support the training program in two ways:

1) possible help in paying for producing copies for handouts  
2) can help with making arrangements for face-to-face training in various regions of the state, if enough lead time is provided

Anne noted the following about OhioLINK’s possible role:

- OhioLINK is aware of places in various parts of the state that have training rooms, parking, etc.; Candi can help people put together regional training events;  
- printing budget can possibly be provided by OhioLINK;  
- mileage and meals would not be included nor support for access to training software;  
- OhioLINK can also assist with publicity for training (e.g. messages to various lists).

Each of the TF members at the meeting noted that her individual institution would likely allow for release time to provide the training and travel support, but that would be something each person who might be involved in providing training should pursue at her home institution.

**B. Types of training:**

Two primary types of training will be explored and developed:

1) in-person (possibly also involving V-Tel) sessions in various regions of the state and at conferences/workshops  
2) development of online training modules that are computer based

**Initial in-person offerings:**

Initial in-person training could be provided at a central site (possibly OhioLINK) and broadcast out to other areas remotely. (Note: if session is broadcast, screen images are not easily broadcast, so the demonstrations of various tools would have to take place in a different way or be supplemented by handouts/online information. Anne suggested one of us tune into the next CIRM meeting via V-Tel to see what our experience is like.)

Janet suggested “piggy-backing” onto existing events such as SOA and OhioDIG. For example, we could provide a pre-conference session at SOA in the spring. Everyone liked this idea. This would be a very good venue for some initial training to be offered. Beth is going to look into the SOA possibility.

**Online modules and remote training:**

There was high interest in the development of training tutorials that could be accessed online. Rhonda, Janet, and Beth are going to investigate that possibility, especially looking into the type of software that might be used for this kind of development. Several products in use at Ohio University, Ohio State University, and other possible software products were discussed. Janet sent a list of some of those applications via email on the day of the meeting.
Anne also mentioned a program called Illuminate that allows people to hear someone speaking (the presenter) and also see the screen on which the presenter is working so “attendees” can see the screen in real-time as the presentation is being given (several others had taken part in such sessions). This type of thing could be used to augment the “remote training” experience.

C. Content of training (major points of discussion):

1) Training needs to include some basic information on finding aid structure, levels of description, and what EAD is (in a nutshell).
2) Focus of the training should be on the Application. Then just show what the Repository and search engine interface looks like and do a basic demo of that.
3) Different people will have different levels of familiarity and comfort with finding aids and description. Need to address both basic and more complex levels.
4) For the Application training need to include the following: a) basic intro to finding aids, levels of description, and EAD; b) minimum required elements; c) additional, optional elements; d) how best to encode component level—structure of series, etc.; e) validation, downloading, and submitting to Repository

Cara is going to outline the content of an in-person training program for the group’s review.

Logistics of training:

- half day vs. full day (half day better if NOT including hands-on for attendees)
- full day would likely be needed for hands-on (e.g. 9-2 or 10-3 schedule, with break for lunch)
- two people to train would be best; absolutely necessary for hands-on training
- have a simple “model” finding aid for use by all attendees for hands-on training
- for a full day training session: morning could include background on finding aids, levels, etc., collection level encoding; lunch break; afternoon session could include component level; demo of Repository/search engine
- hands-on sessions would have to have a registration limit
- prerequisite for all attendees: read Starter Packet and Content Guidelines
- could be useful to have a “training repository” created in the Application with “x” number of training user accounts that could be “wiped” after training session and then re-used

Facilities needs for in-person, hands-on training:

- room with teacher’s station; projector and screen
- computer workstation for each attendee
- Firefox installed on computers

D. Targets of training:

Primary targets:

- OhioLINK member institutions (with archival or special collections or museums)
- broader Ohio archival community (historical societies, museums, non-OhioLINK institutions)
Other targets:

- OhioLINK Lead Implementers (Anne suggested Amy talk to this group at an upcoming meeting; Amy noted that we are still hearing from a lot of people that their administrators are opposed to the use of EAD)
- SLIS classes (relevant courses being offered at Kent and Columbus programs)
- OhioLINK Library Directors (meet every other month—Jan/Mar)

Timeline (goals):

Depending on implementation of Application and Repository, we would anticipate starting training in late winter or early spring.

Beta testing will begin in November and finish up in January if all goes well.