

## Training Plan

### *SIRMA – ConservationSpace Software*

#### Introduction

This training plan outlines a recommended training strategy for how Training Associates (TA) can successfully provide classroom instruction to selected National Gallery of Art (NGA) users (referred to as users) on Sirma's ConservationSpace (CS) software interface.

This plan is the result of preparation conducted by me over the last 14 days including assistance from Sirma, TA, and NGA staff.

To prepare this plan I attended a demonstration of the CS software from a business analyst at Sirma highlighting its current capabilities and features. Along with this demo, I then examined multiple types of training resources made available to me by Sirma including videos, user guides, access to the CS website and Sirma's Confluence content management site.

In addition, I personally traveled to the NGA and spent two days meeting with NGA staff, project managers, business analysts, and half a dozen NGA users working in their roles as conservation scientists. My emphasis on interviewing these users focused on their current skill levels and the skills they need to obtain to effectively use CS on a daily basis to meet NGA business goals.

#### Business Goals

The CS training proposed in this plan supports NGA's primary business goal of using the CS system to increase staff productivity and efficiency across all roles in the NGA Conservation department.

The training outlined in this plan will meet this goal in several ways:

1. Increase NGA user acceptance and role-based knowledge of the CS system.
2. Help users become more comfortable with the new CS system in their roles and thereby be more open to using the software on a daily basis.
3. Increase user confidence in their ability to perform their job responsibilities successfully when using the CS system.
4. Assist in meeting NGA's goal of having legacy conservation content integrated into CS in an ongoing and timely basis.

## Learning Characteristics of CS Users

For the first phase of CS training, Novice Training, I am recommending instructor-led training in a classroom environment for several reasons.

Firstly, the average characteristics of the NGA user seems to include a current frustration level based on the initial rollout of the software by Sirma. This is not a result of the software not meeting expectations or lacking in other areas; it is due largely in part from a lack of time spent by NGA staff using the CS interface compounded with users simply being overwhelmed at the capabilities of CS.

The NGA staff needs clear and concise training on expectations when using CS and how they can successfully use CS in their roles on a daily basis.

Secondly, users seem unclear on the amount of information they should be entering into CS in response to direction from NGA managers, and therefore remain unclear on exactly how to use the system to achieve management business goals.

This frustration can be reduced and replaced with increased user confidence by having users attend training in a classroom environment where an expert certified trainer can take them systematically through the learning objectives identified in *Current Performance Gaps* section of this plan.

Compared to virtual and online training methods, the classroom experience enhances communication, reduces distractions, and increases a user's attention span. Users can ask questions in real time, including role-based questions directly related to the tasks they are asked to perform in class, and receive detailed answers to these questions while using the software.

In support of the Novice Training class, I am recommending additional advanced training courses in another training plan. This training will use a blended method of delivery where classroom training is combined with eLearning modules that explain topics that are more complex in the CS system like the photo widget, system permissions and admin functions, creating reports, etc.

These advanced training recommendations will be discussed in a later proposal.

## Current Performance Gaps

Users at NGA currently have minimal exposure to using CS. However, this is not a direct result of any lacking features or navigation in the CS software. It is a result of the CS software rollout occurring barely a week before my visit in combination with Sirma's introduction of CS being

an overview of the system capabilities, not focused at that time on unique user role-based needs of the interface. As a result, only a few of the staff are currently using CS in any capacity.

Currently, most users are unaware of basic CS operations including where treatment requests are generated, how to import documents like major and minor treatment forms, object analysis requests, object analysis reports, the business terminology used by CS such as "Project", and "Activity", naming conventions for files created in the system, and how CS communicates and can enhance collaboration within NGA.

## Training Activities

My initial impression of the most beneficial training method is that NGA users are more comfortable with instructor-led training for this Novice Training class. I am recommending a 1-day (8 hour) class divided into two sessions: Session 1 introduces the software and Session 2 introduces role-based exercises where users are tasked with real life scenarios designed for their roles at NGA.

These types of training, instructor-led combined with self-paced learning, are effective when supported by having the training instructor in the classroom to answer questions alongside other leaders at NGA who are perhaps more proficient using the CS interface.

This type of training delivery takes place in a technical training classroom taught by an instructor where users receive concise instructions and information, have the opportunity to practice using the CS software including role-playing exercises, small group assignments, and on-the-job skills based training. The delivery of paper-based hand-outs for individual reading and study after training is complete reinforces the training and are used later at the user workstations as reference.

To help users perform the learning objectives identified for this training, the classroom instructor has access to the CS system and presents the lessons and topics to the class using a projector connected to a laptop and running CS.

Each user has their own access (username and password) to the CS system and is able to follow along, when appropriate, in the interface.

### Session 1: Morning Session

The training activities included in the morning session include listening, watching, and then performing various tasks in the CS system at the direction of the instructor and will explore the following lessons:

- Introduction to CS
- CS Main Page
- CS Main Menu
- Projects in CS
- Objects and Databases
- Media in CS
- Introduction to Searching

## Session 2: Afternoon Session

The training activities included in the afternoon session include listening to the instructor provide direction to the class, and then users are responsible for performing various tasks in CS based on unique treatment group scenarios developed for training.

The treatment group scenarios are in a handout format and include tasks that require demonstration of the most relevant content covered in the previous morning session focusing on the role of the user at NGA.

Although there may be several users from the same treatment group attending training, the user's may decide to break into small groups aligning to their treatment group, if desired.

Each user is tasked with performing their own role-based scenario tasks and the instructors and other assistants in the class will help provide feedback and direction as needed.

At the end of the scenario training, the instructor will open discussions with each treatment group participant, ask questions, and get feedback from the users based on their experiences with CS.

For major issues or obstacles encountered, the instructor will log into the system and perform the task for the class to explain the process and answer additional questions any users may have.

In order to meet the business goals of CS Novice Training, upon completion of this proposed class, users are now able to successfully perform the following (referred to as Learning Objectives):

## NGA Novice Training Class

### *Learning Objectives*

Lesson	Topic	Learning Objective
<b>Introduction to CS</b>	<i>Purpose</i>	<ul style="list-style-type: none"> <li>• Explain why NGA is using CS for their conservation goals and the importance of using CS into the future.</li> </ul>
	<i>Terms</i>	<ul style="list-style-type: none"> <li>• Define the critical terms used in CS (Project, Activity, Document, Objects, Template, etc.), and compare and contrast these terms to current needs of treatment groups.</li> <li>• Choose the correct terminology for different functions/tools used in CS in a variety of role-based scenarios.</li> </ul>
	<i>Naming Conventions</i>	<ul style="list-style-type: none"> <li>• Define the standard naming conventions for files, documents, and objects suggested for use at NGA and correlate these to the treatment groups.</li> <li>• Demonstrate the ability to apply standard naming convention to a file or document created in CS.</li> </ul>
	<i>What's in CS?</i>	<ul style="list-style-type: none"> <li>• Define unique types of objects in CS and explain the difference between cultural objects and other items in CS.</li> </ul>
<b>CS Main Page</b>		
	<i>Layout</i>	<ul style="list-style-type: none"> <li>• Identify the different sections of the main page in CS including menus and dashboards.</li> </ul>
	<i>Logging In</i>	<ul style="list-style-type: none"> <li>• Identify how to log into the CS system and who to contact if you have problems logging into the system.</li> </ul>

	<i>Dashboards</i>	<ul style="list-style-type: none"> <li>• Identify the dashboards on the main page including how they are constructed and the CS contents that populate these dashboards.</li> <li>• Explain the basic idea of a widget and how widgets are used to construct the CS dashboards.</li> </ul>
<b>CS Main Menu</b>		
	<i>Layout</i>	<ul style="list-style-type: none"> <li>• Identify the location of the main menu and the icons, search fields, menu options.</li> </ul>
	<i>Main Menu Options</i>	<ul style="list-style-type: none"> <li>• Identify and explore each of the main menu options including: Quick Access, Recent Objects, Libraries, Admin Menu, Keyword Search, New Action, User Section.</li> <li>• Demonstrate ability to choose correct location on main page when performing different functions such as searching, confirming activities, creating projects, etc.</li> <li>• Explain how each main menu option can be used to perform unique goals in CS depending on treatment group, role, etc.</li> </ul>
<b>Projects in CS</b>	<i>Purpose</i>	<ul style="list-style-type: none"> <li>• Explain what a Project is in CS and the terminology used involving Projects.</li> <li>• Define the Project timeline, using a flow chart of activities, including the creation and completion of a Project in CS.</li> <li>• Demonstrate some of the actions and activities performed using Projects such as adding attachments, adding thumbnails, etc.</li> <li>• Demonstrate how to create new activities.</li> </ul>
	<i>Project Contents</i>	<ul style="list-style-type: none"> <li>• Define the contents (items) available for inclusion in a Project including the importance of documents, analysis reports, images, etc.</li> <li>• Identify the relationships between items in a Project and the critical results that can occur when deleting and/or updating Projects.</li> <li>• Demonstrate how to create a Project and add contents relative to the user's treatment group and role.</li> </ul>

		<ul style="list-style-type: none"> <li>• Demonstrate how to open and close a Project.</li> </ul>
	<i>Documents</i>	<ul style="list-style-type: none"> <li>• Define what a document is in CS and the terminology used when using documents.</li> <li>• Demonstrate how to create new documents in CS and edit these as needed.</li> <li>• Demonstrate how to create a document and take actions on documents.</li> <li>• Demonstrate how to add reports to a Project and complete that project (close) and reopen if needed.</li> </ul>
	<i>Templates</i>	<ul style="list-style-type: none"> <li>• Define how CS uses templates and how these templates are created in CS.</li> <li>• Explain the use of templates by different treatment groups at NGA.</li> <li>• Demonstrate how to find templates in CS, how to add content to the template, and how to edit the template if needed.</li> </ul>
<b>Objects and Databases</b>	<i>Introduction and Purpose</i>	<ul style="list-style-type: none"> <li>• Define an object in CS and explain how these objects are used in CS at NGA.</li> <li>• Explain the unique databases CS uses to store all cultural objects for use at NGA.</li> <li>• Define what a Property is in CS and explain how objects can have multiple properties that describe it.</li> <li>• Identify the cultural object details and properties for an object and how they appear in CS.</li> <li>• Demonstrate ability to choose correct database for searches based on object desired.</li> </ul>
<b>Media in CS</b>	<i>Media Objects</i>	<ul style="list-style-type: none"> <li>• Define media object types such as images, video, and audio in CS and explain how these are different from cultural objects.</li> <li>• Demonstrate how to import media types into CS and edit, as needed.</li> </ul>
<b>Introduction to Searching</b>	<i>Introduction and Purpose</i>	<ul style="list-style-type: none"> <li>• Identify the main menu location for performing searches in CS.</li> </ul>

		<ul style="list-style-type: none"><li>• Explain the differences between basic, advanced, and external searching in CS.</li><li>• Demonstrate how to access, preview, select and import cultural objects into CS.</li></ul>
<b>Next Steps</b>	<i>Introduction to Advanced Training</i>	<ul style="list-style-type: none"><li>• Introduce advanced training sessions on using the Image widget, using the advanced and external search tools, setting system permissions, creating reports/documents in CS.</li></ul>



## Training Resources

Along with the technical classroom training resources for the delivery of multi-media and software user instructions, there are additional training resources that could also be integrated into the training courseware:

**Facilitator Training Presentation** – PowerPoint presentation used by the instructor to introduce the lessons and topics to the users. This presentation does not contain all of the detailed content for the class, it is designed for use as a guide for material that the instructor is covering and discussing in the classroom.

**Facilitator Guide** – MSWord document containing the overhead presentation slide content but with additional notes and details on how to best present the information with the goal of having users follow along in the CS system, request feedback, start discussions, answer questions, etc.

**Student Guide** – MSWord document containing the overhead presentation (without the facilitator guide notes and details) and it includes areas for writing notes on lessons and topics.

**Conservation Space (2.3) Quick Access Guide** – MSWord document that is an excellent resource initially developed by the Project Manager at NGA. I recommend adding additional content to this guide based on lessons/topics covered in the Novice Training classroom and provide it to the users after training so they can continue using it in their workplace as reference.

**Treatment Group Scenarios** – MSWord document designed for each treatment group, it contains task-based scenarios relevant to each group. In Session 2 of training, users will perform these tasks in CS and get feedback and assistance when needed.

**Introduction to ConservationSpace Training – Overall Course Assessment** - MSWord document initially developed by the Project Manager at NGA. I recommend using this evaluation method at the conclusion of this training so we can compare feedback and make direct comparisons to realize our success areas as well as determine our strengths and weaknesses going forward.

## Evaluate the Training

I recommend using the existing *Introduction to ConservationSpace Training – Overall Course Assessment* evaluation tool owned by NGA.

The results can then be compared against the previous round of training and strengths and weaknesses in this round of training are identified quickly and improved on immediately.

## Conclusion

After performing the needs analysis described in this training plan, I am confident that providing this recommended instructor-led classroom training, supported by the additional training resources explained above, would result in a quantifiable increase in the user acceptance and effective usability of CS system by training participants.

After completing this training, these participants will be more comfortable using CS and more willing to use the system as designed. An increase in user confidence will result in an increase in user adoption and will result in more users working towards meeting NGA's goal of having legacy conservation content be integrated into the CS system on a timely basis.