ORGANISATIONAL ASPECTS OF TRAINING ACTIVITIES

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Prepared by	PP8/UHAM Prof. Dr. Gertraud Koch, Dr. Eliane Fernandes Ferreira
Project number and acronym	ARTISTIC Central Europe Project CE1152
Lead partner	T2i trasferimento tecnologico e innovazione
Address	Edmund-Siemers-Allee 1 (West) | 20146 Hamburg | GER
Email	eliane.fernandes.ferreira@uni-hamburg.de
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Preamble

The content of this document was adapted from the "Open Science Training Handbook"[1]. It is an Open Educational Resource, and is therefore available under the Creative Commons Public Domain Dedication (CC0 1.0 Universal). The content was adapted to attend the demands of the EU Interreg Central Europe ARTISTIC project that aim the valorization of Intangible Cultural Heritage (ICH)[2] assets for local sustainable development in central European regions.[3]

1 Foster Open Science: "Open Science Training Handbook", Chapter "On Learning and Training", URL: https://book.fosteropenscience.eu/en/

2 From now on, Intangible Cultural Heritage will be referred to as ICH in this paper.

3 EU Interreg Central Europe ARTISTIC project: https://www.interreg-central.eu/Content.Node/ARTISTIC.html

1. Organisational Aspects of Training Activities

This document will guide you through the main practical aspects of organising a training event. What you need and will use will depend on the type of event you will organise. Therefore, the checklist should be adjusted accordingly. You will get information on preparation steps and necessary organizational tasks. This will provide you not only with valuable knowledge about event organization, but will reassure you while preparing your training.

1.1. Organisation of Training Activities: Basics

1.1.1. Format

Here are some points to consider:

- Format of the training: live workshop, online training or mixture of online and in-person?
- Will it be participatory, formal, self-contained?
- Do you need to invite any other external experts? What are the requirements for that (e.g., funding)?
- Will attendees receive any form of accreditation for the training?
- What sort of venue type do you need for this format?

To provide initial guidance over possible types of training and their characteristics, see table on the next page for recommendations.

1.1.2. Types of training

	TYPE OF TRAINING			
	Live workshop	Course/ class	Lecture	Online Training
Audience Size				
<20				
<40				
>40				
Funds				
none				
little				
loaded				
Time				
<½ day				
½ - 1 day				
1- 4 days				
> 4 days				
Training level				
Introductory				
Aware of				
Intermediate				
Advanced				

1.1.3. Audience, guest speakers, and partners

Before committing to the training activity be sure you defined your target audience and that you are aware of their needs. Consider your audience, its size and the number or area of competence of (guest) trainers.

1.1.4. Cooperating with others

Some forms of training require more than one instructor. Try to get support from colleagues or service units in your institution. Identify institutional support (e.g., funding, room(s), work time) and reach out to decision makers to ask for these things - for example, you could ask for help with registration, or contact the printing service or communication department regarding advertising. Make sure any volunteers are sufficiently briefed on all activities, and know what the aims and practicalities of the event are. Make them aware of the importance of encouraging participation from the attendees. You can also outsource some tasks, if the budget allows for this.

Consider partnering with other departments at your institution or other local institutions to pool resources and increase impact/collaborating with other projects or programs. These are the key points to work out prior to committing to, or announcing any event. Resolving these will help the training run smoothly for yourself and your participants.

Identify other trainers or experts/guest speakers that could help with the event. Ideally, these will be other supporters at the institution or otherwise local to the event, but you may need to find suitable non-local trainers (who may need financial support for travel). Work to have diverse representation. According to The Carpentries[4], a workshop with 40 people needs at least two trainers (and possibly a third) who alternate between talking and supporting learners, including also one helper per five participants that will continuously monitor for any issues.

1.1.5. Representation

Maintaining an inclusive environment is important for any successful training event. Ensure that each component of your programme includes a range of backgrounds. Your organizing team, speakers, and trainers should include representation across gender identities, different disciplines, underrepresented groups, diverse racial backgrounds, and geographic regions (if you intend to open your event to non-local participants).

Actively invite trainers and speakers from underrepresented groups. Make sure to discuss with them their specific goals and needs, and include these in the planning of the event.

Ensure that a proportion of participant spots are reserved for attendees across ethnic backgrounds, gender identities, disciplines and geographic regions.

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[4] https://docs.carpentries.org/topic_folders/hosts_instructors/index.html

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1.1.6. Venue

Before organizing a face-to-face training event consider few things related to a venue. It might help you to reduce several obstacles:

The venue should be easily accessible for the participants. The venue should have elevator access, accessible entrances, ramps, and clear legible signs. Check if the venue is easily accessible by public transport or car (parking spaces) and that it is not too far away from rail stations or the airport. Locate a place to greet your attendees and a place for them to circulate and socialise. A separate area for catering should be available.

If possible, the training room should be sufficiently equipped (equipment and media). Check to see if furniture can be rearranged in order to suit your requirements. The presenter will need a high (or raisable) table for standing and a microphone (for recording and/or accessibility). An additional microphone for participant questions aids accessibility.

1.1.7. Timing

The length of the event depends on the content and depth of the training you intend to provide. You should have an estimate how much time each component will take. Make sure to define an agenda or time schedule, including any icebreakers and introductions. Allow enough time for lunch and coffee breaks. Be reasonable with your start and end times.

Before scheduling your event think about obstacles that might prevent or induce people to join and try to pick a suitable time and date of the event. Make sure to avoid conflict with any public holidays, religious holidays, or similar events. If your event is hosted at a university, keep class schedules in mind. Consider to place your training session along with a larger conference or meeting in order to bring more attention, increase the attendance and get the chance to bring any speaker attending the other event. A family friendly workshop should avoid evenings and weekends, provide childcare or childcare sponsorships, and ensure areas for breastfeeding mothers.

1.1.8. Budget

You may need financial support to help run your event, to pay for things like the venue (if the host institution cannot or will not provide this for free), travel support for non-local trainers/experts, refreshments, materials (e.g., name badges, USB drives) and swag. Most types of training will need at least a little money for material and equipment. Also, keep in mind that the costs associated with human resource are often the largest costs associated with running an event. It is good to identify time needed for staff to prepare materials and content, which is often not budgeted for. These costs may be covered through as a core aspect of the job, but if not it might be wise to ensure funding to cover this aspect is sourced.

Consider different ways of creating a budget for your training. If possible, request funds from your institution. Otherwise, you might have to charge a fee from participants or look for scholarships and other ways of funding.

1.1.9. Funding

You can get funding from a few difference sources: the host institution, external sponsors like companies, budgeted funds on faculty/principal investigator's grants, or through registration fees. Check if there are any internal sources for funding or relevant local organizations who can sponsor your event. If you have found a potential partner, check the funding conditions. This could include advertising on your event website or at the event itself.

Consider different levels of sponsorship in case of bigger events. You might also want to look at other projects or programs to co-organize and share costs with.

1.2. ORGANIZATIONAL TASKS

1.2.1. Equipment and Media

Long-term preparation

Here are some things to consider:

Will participants need access to WiFi? Make sure that any requirements for access are dealt with ahead of time (e.g., by providing guest account details). Check if the venue has enough power outlets. Make sure to check with the venue owner in advance for availability of technical support. If you are planning on recording the event make sure you have the correct equipment, and that attendees are aware (and have consented) to being recorded. Think about how you are going to license any outcomes: will you apply a CC license to pictures, videos, and training materials? Are the authors ok with that?

Shortly before event

Making sure that all of your equipment, media, and materials are in fully functioning order can help to avoid any embarrassing hiccups during your training. Make sure that your laptop, or the device which is hosting your material, is compatible with the media technology in the venue. Ask guest lectures for their presentations in advance and store them all on the same laptop. This will make it easier to switch from one speaker to the other. Make sure to bring any relevant adaptors or extensions. Check WiFi strength and power outlets, as well as, if the speaker and projectors work in advance, and that your file formats are supported. Make sure there is an emergency contact for technical issues.

Make sure to print out any paper handouts in advance and to have enough of them to go around. If you plan to hand out a lot of material, consider providing folders or binders to help with organization. Alternatively, consider just making all your material available digitally via your event website.

Preparing a variety of media can help engage an audience with diverse learning styles. You should prepare any teaching aids in advance (e.g, flipcharts, practical exercises, games). Bring

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notepads, post-it notes, pens, thumbtacks. If participants need any other computer-based materials, make sure these are well organized and available in advance.

1.2.2. During the event

If your equipment fails, do not panic. Call the IT support and explain the problem to the attendees. Most people understand that. What might feel like hours to you are just a few minutes of lost time. If the equipment still not works, try to work offline with flip charts for example. If you are relying heavily on media equipment and it is just a small group of participants suggest rescheduling the training.

1.2.3. Marketing and Advertising Strategy

Long before the event

Developing a strong marketing and communication strategy is fundamental to driving participation, as well as teaching you how to develop and refine your messaging.

Consider which kind of name your training will have. Think about your framing and messaging. What are the common values that you can appeal to? How are you going to get people in the room? Remember, training is not unidirectional, and can be incentivized by framing it as a networking opportunity. For instance, find some partners in Graduate Schools, Master Schools, Support Staff trainings, Valorisation Center etc.

Consider both digital and non-digital media. Use institutional mailing lists and social media (e.g., Twitter, Facebook, blog). Will you have dedicated social media profiles? What sort of content will you share on them? Think about relevant images and logos. This is more important if you want to run more than one event. If the event is being run with the sponsorship of, or in coordination with, an institutional organization (e.g., the library, a particular college/department), then you may want or need to use the profiles of the organization. This might require someone else to post the material, so keep that in mind. Several of these recommendations might require organizational sign off or additional budget support - start investigating these options as soon as possible.

Find out if you can post flyers or posters at your institution. Are you going to design a poster? What sort of logos, images, text, and information do you need to include? Make sure to clearly communicate the pre-defined objectives (skills and knowledge). Ask relevant organisations to help with advertising. Connect with relevant media, create a press release. Use existing communication channels, e.g. at the university library you might ask subject librarians to promote the event to their academic communities.

Shortly before the event

Send a reminder on social media and mailing lists. Put up signs so your attendees find the room.

During the event

Publish pictures and short videos from the event on the website and social media. Tell participants the hashtag for the training and ask them to send at least one tweet/message during the event. Collect reasons for attendance for advertising of future events.

1.2.4. Registration

Long before the event

Set up an event registration using a service like Eventbrite or Event Smart (which are free for free events, but may include fees if your event has a registration cost), or something like Google Forms to capture basic information. For smaller events, you can also use registration via email. However, do not forget to send them a confirmation, when they register and before the event to send a reminder.

Be sensible and transparent about the information you collect. If you need to ask information like gender, age or nationality, keep into account that this is not always as straightforward as you might think - always offer the option of a blank field. Please do not use the distinction between Mrs and Ms.

You can make a short poll to measure what do participants already know about the topic (their pre-knowledge). It can help you to prepare training material. Make clear what data is going to be shared/retained and why. Always offer people the option of opting out, and keep any information you do archive safely stored. Consider creating a list of interested participants for a newsletter or for keeping in touch, but be aware of data protection (like the EU General Data Protection Regulation (Regulation (EU) 2016/679)).

Shortly before the event

Depending on the size of the audience, provide a separate staffed registration desk. Make sure staff has all information including a participants list, and let them take care of badges and attendance sheets/certificates.

If there is no separate registration desk, prepare a cheat sheet with information to keep at hand (public transportation, emergency numbers, requests for certificates, safety during the event etc.).

During the event

Do you have consent from participants to re-use or share their contact information or to take pictures and publish them? Did all participants sign the participants list?

1.3. Communication

Long before the event

Prepare and send formal invitations to participants, guest and keynote speakers.

Create a website for the training event, such as using GitHub Pages or on an institutional website.

Make sure any key resources are visible and accessible if needed. If you want the participants to come with research outputs (e.g., papers, code, data) for exercises, let them know with plenty of time to prepare (and consider making this optional).

Shortly before the event

Communicate requirements to your audience in advance.
- Let them know if they need to bring laptops or other work materials.
- Make sure any prerequisites for software or programming abilities are communicated in advance.
- Provide basic contextual reading materials, so you do not have to start at the beginning point.

Send a reminder email to your attendees a day or two in advance of the event, if possible.

Remind people about reachability and accessibility of the venue. Send detailed instructions for parking and public transport options.

During the event

Dedicate some time to housekeeping at the start of your event. Write down hashtags and Wi-Fi passwords.

1.4. Catering

Long before the event

What refreshments will you either need to provide, or will people need to bring their own? If you provide refreshments, you may need to obtain funding or charge for registration.

If relevant, you can ask during registration in advance for dietary requirements - but keep in mind this might make it very complicated for you. Sometimes it's better to ask the caterer to provide sufficient varieties (vegetarian, vegan, gluten free, etc.) and add one free field on your submission forms so that participants can fill in specific requests if necessary (e.g. intolerances and allergies).

Shortly before the event

Check the venue and inform the caterer where and when to deliver the refreshments.

During the event

Be sure you have the contact information of the caterer if the catering is not showing up, delivering the wrong lunch or forgot something.

1.5. Certification of attendance

Long before the event

Prepare a template and assign who will keep records or monitor registration process.

Shortly before the event

Prepare a generic certificate of attendance with event or organiser's logos and event information that can be distributed digitally when requested.

During the event

Ask participants if a certificate of attendance is needed.

If a signature sheet is required, make sure you do a check during the day or ask to complete it at registration.

1.6. Signs

Long before the event

Check the venue and define spots to be marked by signs to help participants to easily find a room.

Immediately before the event

Design, print and place the signs and leave useful information at the reception desk.

During the event

Remove the signs after the event.

1.7. Social media and notes

Long before the event

Plan your social media activities, ask colleagues from other departments and/or partner organization to help you in sharing information.

Immediately before the event

Prepare note documents (e.g. public Google Docs or etherpads). Make announcements on social media.

During the event

Ask your audience whether they are ok with being filmed, photographed and featured on social media. If it is a big audience, you might consider handing out stickers to those who do not want to be featured.

Assign note takers and people responsible for social media. Ideally, rotate heavily to avoiding slacking and loss of attention.

2. EVENT CLOSURE

2.1. Venue

Make sure you leave the venue neat and clean, unless your agreement for using it does not require this.

2.2. Debrief

Debrief with the other trainers/speakers to self-assess how the event went.

2.3. Evaluation

Send post-training assessment survey to participants or distribute an evaluation form during the event and make sure people hand it in at the end.

Read and count the questions in the evaluation form. Make your self-evaluation.

2.4. Dissemination

Upload all the material used during the event (presentations, documents) if they were not available beforehand. Make sure to provide open licenses if possible, and make sure participants are not identifiable (e.g., within a notes document).

Prepare a report for your funder or institution and if needed make it public (e.g. blog, twitter, website).

3. References

Foster Open Science (n.d.): "Open Science Training Handbook", Chapter "Organizational Aspects: https://open-science-training-handbook.gitbook.io/book/organizational-aspects (Retrieved February 12, 2019)

4. Annex:

4.1. CHECKLIST Example

What	When and who?	Done?
Equipment/media		
Determine what technical equipment is needed		
Check if enough power outlets are available		
Order Wi-Fi for participants		
Organize video recording and taking pictures		
Test equipment a few days before the training		
Print out handouts, feedback forms and material for exercises or publish them online		
Prepare flip charts and pinboards		
Venue		
Check elevator access, accessible entrances, ramps		
Check public transport and parking availability		
Clear, legible signs		
Brief your helpers before the event		
Marketing/advertising		
Identify communication channels		
Set up online presence		
Send event information to mailing lists		

Inform about your event in social media		

Registration		
Set up registration module		
Collect information on dietary needs and allergies		
Provide hotel information for events over several days		
Send confirmations/invitations to attendees and provide clear text and image instructions to the venue		
Send a reminder 1 or 2 days before the event		
Prepare name tags and print participants list		
Prepare a registration desk		
Organise a wardrobe checkroom for larger events		
Catering		
Identify catering options and needs		
Order catering		
Check if meals are clearly labeled (especially regarding dietary needs and allergies)		
Communication during event		
Inform the participants where to find emergency exits, food/beverages and restrooms etc.		
Hand out consent forms for video recordings, live streaming and/or photos		

Post event dissemination		
Make photos of flip charts and other non-digital material or results		
Hand out or send certificates of attendance		
Provide or send training material (slides, notes, video recordings) to the attendees		
Provide a report for your funder or institution		
Evaluation		
Hand out or provide an online or printed form for feedback		

Dr. Eliane Fernandes Ferreira
Prof. Dr. Gertraud Koch

PP 8 / Universität Hamburg
Edmund-Siemers-Allee 1
20146 Hamburg
Germany

eliane.fernandes.ferreira@uni-hamburg.de
gertraud.koch@uni-hamburg.de

+49 (0)40-42838 6515
+49 (0)40-42838 2014