Guidelines for the organisation of TRIPLE Open Science training events

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Application

These guidelines apply to organisers who take part in the TRIPLE Open Science Training Series, a set of instructions is provided for both speakers and moderators.

Purpose

The purpose of this document is to provide a structured step-by-step guide which can be duplicated and repeated easily throughout the entire training series to support the organisers, moderators and speakers of the TRIPLE Open Science Training Series.

*Note*: This document is aimed at novices. If you have already taken part in the TRIPLE Open Science Training Series you may wish to go directly to the To\_Do spreadsheet.

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Guidelines for organisers

#### Before the event

All training events are delivered online.

The software Zoom is used to deliver the training sessions.

The project coordinator (WP1) can provide a Zoom link but any support from other partners are more than welcome.

1. Create a Zoom link (Ask for a link to WP1or to the moderator of the event)
   * Note: it’s important to create the zoom link FIRST because it will be sent to participants via the confirmation page they see after registering.
   * Please make sure that the Zoom account will NOT be used by anyone else for the whole duration of the training session.
2. Open the Event planning document and insert the information related to the training session (if it has not already been done) under the tab “TRIPLE Events”.

1. Go to Google Drive and open the TRIPLE folder (you should find it in the “Shared with Me tab” on the left of your screen).
   * From there you can access the WP6 folder and then the Task 6.3 - folder (T6.3) in which you will find relevant material used for previous training events.
   * Please open the folder Templates for organisation of training events, it contains the following templates that you can duplicate and adapt for each specific training event (add the title of the event, change date, etc.):
     + Registration form,
     + Questions from partners,
     + Template slides for speakers/moderators,
     + To Do spreadsheet template to help you with the division and monitoring of tasks,
     + Template email for event announcement to partners,
     + Promotion and dissemination strategy spreadsheet to be filled in by partners once they have disseminated the event to their networks.
   * Please create a new folder under the T6.3 folder for the training event in which you will deposit all the files relative to this specific event. Once the folder is created, the speaker will deposit a description of the event for you to use (see 5. below).
2. Create a Registration form starting from the template (or duplicate a previous Registration form and modify the information accordingly):
   * Check that consent for recording the event is included
   * Include the description of the event
   * Modify the text in the confirmation page using the template, and add the correct link to zoom or alternative platform.

1. Copy the event description provided by the task leader and send it to the dedicated referent contact to post it on the [TRIPLE website](https://www.gotriple.eu/) under the Training Events tab.
   * Referent person to post the event announcement: WP8 leader or Task 6.3 leader
   * It should be online 2 weeks before the event.
2. Create a Questions form to be shared among the consortium before the event, to gather questions to be addressed to the speakers, starting from the template.
3. Create a survey on [Mentimeter](https://www.mentimeter.com/app) (or duplicate a previous one) to collect participants’ feedback at the end of the session. Make sure to update the code of the post-training survey on the date of the event as it expires every 48h hours.
4. Contact speakers and moderators to identify possible technical requirements (It may be necessary to hold a technical testing session before the official training event).
   * Ask them to add a reference to TRIPLE Grant Agreement n. in their presentation.
   * When possible, provide them with the template slides for moderators and speakers.
5. Send an email to the project partners to announce the event using the template email**. Send it 2 weeks before the event.**
   * Ask them to save the date and register
   * Ask them to disseminate the information to their respective channels (according to the training events mailing list spreadsheet)
   * Ask them to ask their questions in the dedicated questions form
   * Once they have disseminated the information, ask them to write in the promotion and dissemination strategy spreadsheet so we can have a trace of where/ to whom the information has been shared.
6. Send a grouped invitation to potential participants to register to the event via Mailchimp. **Send it 2 weeks before the event.**
   * If you do not have access to the Mailchimp account**:** Ask the contact person who manages the account to be added as a recipient to the Mailchimp mailing list account.
   * Go to the campaigns in Mailchimp, duplicate one of the previous “Invitation” campaigns and modify the information accordingly.
   * Copy and paste the event description provided by the task leader (see 5. above).
   * The invitation should be sent to the audience
   * Make sure you only send the invitation to contacts who have previously agreed for their emails to be reused, they are listed as “subscribed” in the contacts list.
7. Disseminate the event announcement on TRIPLE social media
   * Contact the referent person in WP8 for the promotion plan
8. Import the contacts from the registration form in a .csv file and upload them on Mailchimp. (2 days before the event and on the day of the event)
   * In Mailchimp, create a tag with the name of the event (ex: *VDD* for Visual Data Discovery) and assign it to all contacts from the .csv file you uploaded.
   * Make sure all imported contacts are added as subscribed.
9. Send 2 reminders with technical specifications to attendees via Mailchimp. **Send the first one** **2 days before the event and the other on the day of the event**.
   * Go to the campaigns in Mailchimp, duplicate the previous “Reminder #1” and “Reminder #2” campaigns and modify the information accordingly: update the title of the session, the date and time, and the Zoom link to the training session.
   * Send the reminder to the audience with the tag of the event that you created beforehand. (ex: for the training on Visual Data Discovery, send both reminders to the Audience with the tag *VDD*).

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#### After the event

* Keep track of the number of attendees by filling in the Calendar of OS/EOSC events table.
* Fill in the TRIPLE Public Events Reporting form
* Store the video recording on [Nakala platform](https://nakala.fr) - TRIPLE collective account. (wait for the video recording to be deposited by WP1 leader in the dedicated Google Drive folder).

Contact person:

* Store the video recording on [Youtube - TRIPLE channel](https://www.youtube.com/channel/UCjwEHdltYYhocCC9o6RljuQ).

Contact person:

* Store the slides in Zenodo.org in the [OPERAS Community](https://zenodo.org/communities/operaseu/?page=1&size=20)

Contact person:

* Create a resource in the DARIAH-Campus CMS   
  Contact person:
* Download the data from the survey on Mentimeter and deposit it in the Google drive folder Data Post-Training Surveys
* Insert the data from the post training survey in the table Post training survey (answers)
* In Mailchimp: unsubscribe the participants who have written “No, I do not wish to receive invitations for TRIPLE Open Science events” in their registration form.
* If asked: send certificate of participation (you can find the template in the folder Templates for organising events folder). Send it to participants in version **PDF/A.**

Instructions for moderators

Organisers should provide the moderators with the following information:

#### Before the event

* Provide them technical aspects on how to use Zoom
* Provide them the Zoom link
* Provide them (eventual) question gathered within the TRIPLE consortium with the dedicated document
* Provide the template slides with the TRIPLE Grant Agreement
* Ask for consent to deposit files into Zenodo
* Provide them the link to the Mentimeter survey to be showcased at the end of the session.

#### After the event

* Send the slides to WP8 leader to be deposited in Zenodo, slides must be in OPERAS community and in .pptx format.

Contact person:

* Send the video recording to WP8 leader to be uploaded on the TRIPLE Youtube channel. Contact person:
* Send the video recording and the slides to WP1 leader to be stored on Nakala. Contact person:

Instructions for speakers/presenters

Organisers should provide the moderators with the following information:

#### Before the event

* Provide them technical aspects on how to use Zoom
* Provide them the Zoom link
* Provide them (eventual) questions gathered within TRIPLE consortium with the dedicated document
* Provide the template slides with the TRIPLE Grant Agreement
* Provide instructions on where to deposit the slides and training materials(in the shared Google Drive)
* Ask for consent to deposit files into Zenodo

#### After the event

* Speakers should deposit their slides in the dedicated Google Drive folder so that the moderator or the organiser can send them to the relevant contact person to be deposited in Nakala and Zenodo.

These guidelines were last updated on 10 November 2022.