EGEE

PREPARING AND MANAGING EVENTS

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Abstract: This document discusses the preparation for NA3 training events and defines the required pre-event and post-event procedures required for overall NA3 management

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CONTENT

1. INTRODUCTION

1.1. PURPOSE

The primary purposes of this document are:

- to support and elucidate the EEGE User Training and Induction Activity (NA3) Quality Assurance Plan [R1] by providing the specific guidelines and standards pertaining to the preparation for an event;
- describe the pre-event and post-event procedures required for all NA3 training events in order to support NA3 quality assurance and overall management.

1.2. APPLICATION AREA

This document applies to the EGEE activity NA3, User Training and Induction.

1.3. REFERENCES

[R1] http://edms.cern.ch/document/483910	NA3 Quality Assurance Plan
[R2] http://edms.cern.ch/document/481086	NA3 Training Plan
[R3] http://edms.cern.ch/document/475028	Running an Event
[R4] http://edms.cern.ch/document/414583	EGEE slide template

1.4. DOCUMENT EVOLUTION PROCEDURE

This document will be updated in response to comments, discussions and experience of its application. Availability of new versions will be notified to all NA3 partners.

Comments should be sent to the author (rph@nesc.ac.uk).

1.5. TERMINOLOGY

Glossary

NA3	EGEE Networking Activity 3 : User Training and Induction Activity.
NeSC	UK National e-Science Centre, Edinburgh, Scotland. Used here to refer to the NeSC role as NA3 lead partner.
EDMS	The EGEE Document Management System.

Definitions

Client	Someone who is participating in a (session of a) training event with the primary purpose of increasing their knowledge or skill via the training content of the event.

Presenter	Someone who for a session of a training event is delivering the session material, normally simultaneously to several clients.
Facilitator	Someone is taking the lead role in a group discussion, or chairing a question and answer session.
Demonstrator	Someone who is available during a practical exercise being carried out by clients in order to provide one-to-one advice and assistance.
Tutorial	A training session in which clients carry out practical exercises under the direction of a presenter.
Stage-manager	The person, or role, of making sure that all practical arrangements run smoothly.
Training material	A computer-held item of human-readable material which is both (a) intended for direct use in a training event, or intended to contribute to the construction of material to be used in a training event; (b) capable of existing prior to the delivery of the event (explicitly excluding records of variable-path interactive sessions that might occur as part of the delivery of training).
Training Repository	The totality of the EGEE held training material, with inter-linking structure, comprising source material and archive material.
Archive Repository	The historic record of training material delivered at past events (this being part of the AgendaMaker system).
Source Repository	A collection of standard items of training material (not necessarily from any specific past event) intended to be used directly, or as a base for constructing material, for future events.
Repository Database	A database recording all Repository Material and their relationships and providing repository search capabilities.
Slide	A display constructed in the Microsoft Office PowerPoint application or in the equivalent for OpenOffice.

2. OVERVIEW

This document provides guidelines and standards for NA3 training events (which is here taken as including inductions) and defines the associated procedures. This draft is a proposal for discussion.

Although the context for this document is NA3 training events, much of this document is relevant to other kinds of events, covering general good practice in preparing events. This draft has the limitations of: not dealing specifically with technical retreats; dealing only with live events having all participants physically present.

This document should be read in conjunction with its sister document, Running an Event [R3], which deals with the detailed practicalities of the event itself. In contrast this document deals with longer-term preparations, issues of event design and evaluation, and all relevant NA3 procedures.

2.1. QUALITY REQUIREMENTS

The NA3 Quality Assurance Plan [R1] identifies a number of overall quality requirements which underpin and are elaborated by this document –

1. That there is a clear and appropriate formulation of training pre-requisites and outcomes, in relation to the anticipated range of participants' backgrounds and expectations.
2. That there is a judicious balance of training modes, between: lectures, discussion, demonstrations, tutorials and group-work.
3. That the computing resources for practical tutorials are usable and effective.
4. That there are sufficient, appropriately skilled and briefed, demonstrators for practical tutorials.
5. That all the training material is technically accurate and matched to the pre-requisites and outcomes.
6. That the training materials reach a high presentational standard.
7. That the training event is experienced by the participants as a pleasant and professionally produced event, with issues of safety, accessibility and comfort for all participants being fully attended to.
8. That the potential of training events for networking and community-building is developed.
9. That there is effective capture, during the event, of information potentially useful to the improvement of subsequent training events.
10. That new training material is recorded in a form that facilitates its subsequent delivery by someone other than the author.

Whereas points 1 – 7 would be as for a (training) event in any context, points 8 – 10 are particular requirements within the EGEE NA3 activity concerning Networking and Community Building (2.2 below) and The Training Material Repository (2.3.3 below).

As a matter of NA3 policy, for each event there will be an NA3 *organising partner* with overall responsibility for delivering the event, and a different NA3 partner as *monitoring partner*, with responsibility for agreeing to the creation of the event and checking that quality assurance and other procedures are followed. . Normally this is either: NeSC as monitoring partner and some other partner as organising partner; vice-versa.

2.2. NETWORKING AND COMMUNITY BUILDING

A training event can serve other purposes in addition to the training which is its explicit purpose. For NA3 these implicit purposes could include:

- Providing an opportunity for people from different parts of the EGGE project to meet and establish good working relationships – the development of team spirit which is one of the aims of the NA3 activity.
- Providing an opportunity for EGEE members to meet and establish relationships with people not directly part of the EGEE project.
- Providing an opportunity for obtaining information about user community expectations and (dis)satisfactions, and about potentials for EGEE dissemination and engaging further users.

Generally these should be viewed as being part of the purpose of a training event, with the event being designed to facilitate the required interactions.

2.3. EGEE TRAINING EVENT SUPPORT

There a number of web-based procedures and information systems which support the Training event activities of NA3.

2.3.1. The CERN AgendaMaker.

This provides (potential) clients with information about future events and preserves information about past events. This will be the definitive source of information about scheduled and past training events. For a past event <u>all</u> training material for the event will be accessible via its AgendaMaker entry.

2.3.2. NA3 Roadmap.

This provides a catalogue of expected, scheduled and past training events, each linked to its AgendaMaker entries.

2.3.3. The Training Material Repository

Producing training material to a high standard constitutes a large investment. A goal of NA3 is to make best use of that investment by encouraging the re-use of previously prepared material. For this reason there is a Repository of training material, comprising three components –

Archive Repository. The historic record of all training material as actually delivered at past events. The AgendaMaker system is the vehicle for the archive.

Source Repository. This is a separate system for storing items which are intended for use in composing the training material for a particular event. A source item might be anything from a complete course to a single PowerPoint slide, and is not necessarily in a form that would be actually used in a presentation.

Repository Data Base. This records the inter-relationships between repository materials, primarily one item having been derived from one or more other items, and provides mechanisms for searching the repository. Further details of the facilities will be provided in a subsequent draft.

The term “Training Repository” refers to the overall facility provided by these components. The source repository and repository data base are the responsibility of the NeSC team, whereas the archive for each vent is the responsibility of the event organiser.

The model to which we aspire for training material development comprises the following steps.

- Training materials covering particular subject areas are developed and stored in the source repository

- When a specific event is being organised, items from the source repository are combined and adapted for the specific needs of that event
- The experience of delivering an event, particularly the post-event review, will identify areas in which the source material used can be improved, and the source repository is updated accordingly.

Thus the source repository should embody the accumulated experience gained from delivering training events.

2.4. DOCUMENT STRUCTURE

There are five parts to the rest of this document

- **Event preparation**. **(Section 3)**

  This covers the following issues:
  - Event Design and Justification
  - Assembly of Training Material
  - Event Infrastructure and Practicalities
  - Event Collaboration
- **Training Material Guidelines. (Section 4)**

  This covers general good practice and specific standards concerning the format of training material, particularly PowerPoint slides.
- **NA3 Pre-event Procedures and Checklists. (Section 6)**

  This summarises the previous material as it applies to NA3 training events, and defines the pre-event procedures that must be carried out, including approval of proposed events and their entry into the web-based information systems.
- **NA3 Post-event Procedures. (Section 7)**

  This covers the procedures concerning event evaluation, statistics gathering and exploiting the potential for training material re-use. Most of these require pre-event preparation.
- **Flow chart and Timings. (Section 8)**

  In the current draft this has not been included. It will provide an event planning flowchart and guidelines for the timing of the various tasks.

Sections 3, 4 and 8 have the status of recommendations, whereas Sections 6 and 7 identify what is mandatory for training events that fall within the auspices of NA3.

The authors appreciate that many of the people to whom this document is addressed have substantial experience of delivering training and of organising events, and may find many of the points made here to be stating the obvious. However, experience indicates that even the most obvious things can sometimes be forgotten.

3. EVENT PREPARATION

This section deals with all aspects of preparing for a training event other than details of the preparation of the actual training material which is covered in section 4. Each aspect is dealt with in two parts

- The key questions that need to be asked, and associated risks.
- Discussion of some of the issues raised.

3.1. EVENT DESIGN AND JUSTIFICATION

3.1.1. Key Questions and Associated Risks

- Why is the event being created?
  - Risk: That the training event is for an imagined, rather than real, need, and thus will be too poorly attended to justify the resources expended on the event.
- Who is it for?
  - Risk: That the detailed preparation will be impossible without a clear picture of the intended audience.
- What are the intended learning outcomes?
  - Risk: That the content will not be sufficiently focussed on the actual objectives of the event.
- What is the range of the backgrounds and relevant knowledge bases of the anticipated clients?
  - Risk: That the style and approach will be ill-suited to some clients.
  - Risk: That the content will be too difficult for some clients and/or insufficiently interesting/challenging for other clients.
- What is the duration of the event?
  - Risk: the event is too short to effectively cover the intended material
  - Risk: the event is too long for people to be able to afford the time to come
- Who is going to pay, for which aspects of the event, and from what funding sources?
  - If this is not clear from the beginning, there may be problems such as resentment or a speaker cancelling at the last minute on discovery that (s)he is expected to pay for travel and accommodation.
  - If there is a registration fee, this may deter some clients from attending.
- How will the nature of the event, partly characterised by the answers to the above questions, be communicated to potential clients?
  - Risk: if that communication is not clear and precise, then there may be: clients with expectations which are not matched by the event, resulting in client dissatisfaction and thus damage to EGEE reputation; potential clients who would have benefited but were not able to recognise this.

3.1.2. Discussion

The primary issue here is matching the content and presentation style to the capabilities and backgrounds of the clients and a reasonable duration for the event. This requires, in one or more areas, the characterisation of:

- *Learning Outcomes* - the range of knowledge and skills to be attained by the clients as a result of participating in the event. Within limits there may be variations in outcome expectations, e.g. some clients attending so as to obtain a general appreciation of the field covered, whereas others attending to obtain more detailed knowledge. Such variation should be accepted (one cannot expect courses to match each individual's exact needs), specifically identified and accommodated within the event organisation.
- *Prior Learning* - the range of knowledge and skills of the clients at the start of the event. There are two aspects of prior learning –
    - *Pre-requisites*. The specific prior learning assumed in preparing the event, and thus a minimum standard required of a client to be able to fully benefit from the event.
    - *Learning background.* The range of actual prior learning of the clients. This needs to be anticipated and the event structured so to accommodate the range.

  There may well be areas where there is relevant prior learning, but no training outcomes.

There are always multiple dimensions to be considered for prior learning, training outcomes and thus training content. A top-level framework is the two dimensions of focused/contextual and technical/organisational, as in the following example where each quadrant identifies a subject matter for which the indicated questions need to be answered.

range of prior learning? ***learning outcomes?*** ***(thus) training content?***	**focused**	**contextual**
technical	Details of current EGEE middleware.	History of EGEE middleware and its developmental trends, in relation to other middleware packagings.
organisational	The EGEE project organisation and procedures.	The relationship between the EGEE project and other grid initiatives.

In a rapidly changing field it is important that clients acquire good contextual understanding in order to be able to absorb changes. For the focussed end of the spectrum there are usually very clear criteria for what is included and what is not, determined by the event's specific learning outcomes. For the contextual end, there is usually a wide range of potential material with not very clear inclusion criteria, and thus careful judgement is required. In all areas it is important to formulate, and communicate to the clients, clear motivation, in terms of client needs, for what is included. This is particularly so for contextual material where the client need motivation may be less obvious.

In some cases there is a very well-defined audience and so the outcomes and relevant prior learning can be very easily and briefly characterised, e.g. training existing experienced EGEE applications developers in a new middleware release. In other cases there is potentially a much wider range of clients, and it is important that in the event description sufficient information is provided that potential clients can correctly determine whether the event is suitable for them. Where there is a wide variation in learning backgrounds and outcome expectations, it may be unrealistic to run this as a single event.

The networking and community-building functions of training events mean that it is desirable to attract a group providing a mix of different countries, different backgrounds and different areas of activities. There needs to be a balance between: (a) aiming for client heterogeneity for these purposes; (b) aiming for client homogeneity which is beneficial for the direct purpose of effective delivery of the training material.

For NA3, specific training event types have been identified, defined in Section 4.

Having identified re-requisites and outcomes, it is then necessary to attempt to quantify the likely attendance. In some cases this will be straightforward, in other cases only a guess. Clearly, the more substantial the event the more important it is to be sure their will be sufficient clients to justify it.

The costs of running a training event are substantial, particularly when including less visible costs such as salary costs and home institution overheads for the clients' time. As a very broad estimate, a 3-day event, delivering completely pre-prepared material, with 20 clients from multiple European locations, might have total real costs of €45,000**.** The justification of the event, the amount of effort taken to make it effective and the required reporting procedures covered here, should all be seen in light of the order of magnitude of these total costs.

There are some specific questions on funding the event:

- If there are specialist presenters at the event who will pay their expenses?
- Will there be a registration fee, and what will it cover, e.g.
  - Expenses of specialist presenters
  - Cost of facilities, such as room hire and transport hire
  - Cost of social events which are not paid for directly by the individual client (expense re-claim structures in some institutions mean that it may be attractive to have a registration fee that covers the cost of social events)?

For all training events there should be a proposal form (covered in section 5) which gives the rationale for the event in terms of: its prior-learning / learning-outcomes structure; reasons for believing there is a need for the event, in view of the NA3 training plan and the context of other training events; reasons for believing that there will be sufficient attendance to justify the event.

3.2. ASSEMBLY OF TRAINING MATERIAL

3.2.1. Key Questions and associated Risks

- What will be the mix of lectures, discussion, group work, demonstrations and practical tutorials?
  - Risk: that without an appropriate mix, learning will be ineffective.
- Which tutorials / demonstrations will be viable in view of likely availability of demonstrator and computing resources?
  - Risk: event failure!!
- To what extent is existing training material to be re-used, or new training material created?
  - Risk: Resources will be expended unnecessarily in creating new training material, when satisfactory material already exists.
  - Risk: Existing training material will be used which in fact is ill-suited to the particular clients for this event, or out of date.
  - Risk: Re-used material will be being presented by someone who doesn't understand it to the depth needed to respond to questions.
- What training support material will be available to clients before, during and after the event?
- How is the quality of the training material to be pre-evaluated?
  - Risk: that without a review of new material, and thorough testing of practical examples, there will (almost inevitably) be flaws not seen by the author.

3.2.2. Training Modes

A session in a training event will generally be in one of four modes: *lecture*; *discussion* involving the clients; *demonstration* in which the presenter interacts with some computing system in view of the clients; *tutorial* in which clients interact with some computing system in order to try out examples; *group-work* in which several clients work cooperatively on some task. It may be a combination of modes, e.g. the trainer and clients jointly going through an exercise**.** There might be other modes, such as clients witnessing a discussion between, or putting questions to, a panel of experts.

It is important to consider the full range of possible modes and decide on a judicious balance between them. There should always be some allowance for general discussion, particularly due to the multi-way communication aspect of the event.

The primary decision is the extent and nature of tutorial work, if any. For an event with significant practical content some tutorials will be essential to reinforce the material. However there are many risks associated with tutorials which need to be anticipated and managed:

- Not enough, technically proficient and training-skilled demonstrators who are competent in a language that will enable effective communication with clients.
- Computing system failures, including network hardware failures.
- System (computer or network) overload due to peaks produced by many people doing the same thing at the same time.
- Some clients lacking essential background skills (e.g. in use of command line interfaces.)
- Pre-requisites (such as obtaining certificates) which have not been done.
- Clients being unable to connect their laptops to the network.

Demonstrations can be very useful, for a technology appreciation session as well as for an actual technical training session. Demonstrations offer some of the same risks as tutorials, particularly computer systems not functioning as anticipated. It is good practice to have available an alternative presentation of the material to be demonstrated, in case of computer system malfunction.

There are some training events which have some element of “selling” EGEE, and for these risk management of demonstrations/tutorials is particularly important.

3.2.3. Training Support Material

The term training support material includes any item of information which is accessible to the client outside of a presentation of the material by the trainer, typically: the slides for lectures; supplementary course notes; instructions and explanations for the examples used in tutorials. For computer-held material, it is important that it is clear where they can be found, and that it is certain that all clients will have the means to access them. Whenever possible material should be available electronically. For all material, a consistent “house style” is important. These issues are covered in section 4.

By the start of the event all the support material should be available since a client might want to pre-view a particular presentation. It is also beneficial to have a draft version of the material available beforehand (provided it is not technically misleading) since this may be useful in helping a potential client to decide whether or not to attend all or part of the event.

3.2.4. Sources of Training Material

A particular item of training material - slides for a lecture, tutorial examples, course notes etc. - can be obtained either by using a repository item (perhaps with some adaptation) or creating a new item. A database search interface for the repository will be provided to facilitate finding material that can be used. Usually, source repository material is more reliable than archive material, and more up-to-date source material should be looked for.

In the general case, there will be some material that can be re-used, with perhaps some adaptation, and some new material that needs to be created. When re-using tutorial material it is essential to thoroughly check the material because there may be minor differences required for different installations. When re-using lecture slides, the presenter needs to check out that (s)he really understand the material covered and would be able to answer any reasonable question that might be inspired by the content (even if not directly connected.)

If the event requires production of new material, or substantial modification of existing material, then people have to be found who have the expertise and time to do that, and sufficient time must be scheduled. For someone with a thorough grasp of the material to be presented, a typical allowance is 8 hours preparation time for each hour of presentation, although there is a wide variation between authors.

3.2.5. Pre-event Review

Unless an event is a repeat of a previous event with only minor modifications of the material, it is necessary that each item, presentation or tutorial, is reviewed by someone other than the author, in order to check the four Cs -

- Technical accuracy of **Content.** Content review must be by someone with sufficient expertise in the topic, which may have to be someone in a different institution than the author of the material. Where a talk is being presented by someone who is not expert in the topic, the slides themselves will not always be sufficient to check accuracy, and the slides should be supplemented by notes which are included in the content review.
- **Clarity** of presentation (see section 4 for some guidelines). For this, a "walk through" of the material by the author is recommended. This heading includes conceptual clarity and presentational issues such as pace and sustaining audience attention. The reviewer should be someone who is an experienced presenter, normally someone within NA3.

(The above checks on content and clarity may reveal deficiencies in repository material from which the reviewed material was derived, and this should be reported back to the NeSC team.)

- **Continuity** (and consistency) between successive presentations (if material is being prepared by more than one person); specifically that latter material appropriately builds on earlier material, with neither: unnecessary repetition (although summarised repetition is necessary); nor wrong assumptions about previously covered material; nor apparently contradictory information (unless intentionally so to develop discussion).
- **Compatibility** with the anticipated pattern of clients' prior learning and learning outcome expectations.

For short events, there should be one person who reviews all material for clarity, continuity and compatibility, and (if sufficiently expert) content. For a long event that may be impractical, in which case there would be different reviewers covering different presentations, and thus a need also for one reviewer who checks for overall continuity, without reviewing each presentation in detail. The organisers need to find people to do the reviewing and schedule sufficient time for the review and resulting changes in the material.

3.3. EVENT INFRASTRUCTURE AND PRACTICALITIES

3.3.1. Key Questions and associated Risks

- Will this event be held within the organiser's institution or elsewhere, and if so where?
    - Risk: The venue will be in some respects unsuitable for the event.
    - Risk: There will be problems caused by the venue being unfamiliar to the team.
- When will the event be and what are the registration opening and closing date?
    - Risk: The dates will be inconvenient for potential clients and/or presenters.
    - Risk: The notice for the event is too long or too short.
- How will potential clients get to know about the event and be attracted to attend?
    - Risk: Nobody will turn up.
- How will clients register for the event?
    - Risk: inadequate registration procedures will lead to confusion.
- What information needs to be provided to (potential) clients?
    - Risk: clients will be frustrated.
    - Risk: event organisers will be deluged with requests for information.
- What individual arrangements (e.g. accommodation) will be made by the organisers?
    - Risk: organisers will spend too much time on such arrangements.
    - Risk: clients will be struggling to make, from a distance, their own local arrangements in a foreign country.
- What is the running order and duration of sessions?
    - Risk: essential sessions will be late on the afternoon of the last day when half the clients have already started their journey home.
- Who will be stage-manager for the event?
    - Risk: unless there is someone with overall responsibility for practical arrangements, and the time to do it, something will go wrong.
    - Risk: those who are doing the training will be distracted by having to attend to practical arrangements.
- How will the information that is required for NA3 post-event procedures be efficiently collected?
    - Risk: The information will not be collected or its collection will require excessive effort.
- How will social interaction between clients be facilitated?
    - Risk: that the opportunity for networking will be lost.
- Will a contact list for clients be produced?
    - Risk: It is, and some people object to personal information being disclosed.
    - Risk: It isn't, and people don't know how to contact each other after the event.
    - Risk: It isn't, and people new to the community have no idea who anyone is.

3.3.2. Venue Selection

The most import decision is where to hold the event, a decision which is informed by many considerations, e.g.

- maximum and minimum number of clients.
- availability of presentation aids.
- availability of suitable computing resources for demonstrations and/or tutorials.
- availability of network access for clients.
- accessibility for clients.
- accessibility for training team.
- availability and cost of accommodation.
- facilities for refreshments and lunches.
- availability of supplementary rooms for multiple parallel sub-groups.
- local practical/administrative support.
- dates when venues are available.

It may be that venue considerations will affect event content, for example the characteristics of computing resources at the available venues effecting what tutorials / demonstrations can be included.

The simplest solutions will be: the venue to be at the home institution of the training team; at the home institution of the clients if the is an event for a particular institution; or at some other EGEE active institution. However, wherever is chosen it is important well in advance to check out all the event requirements on the venue, and make sure that responsibility for practical organisation is clearly allocated.

3.3.3. Dates

In choosing the actual dates for the event there are a number of considerations:

- Different countries have different local holidays. It may be detrimental to attendance to hold an event on a day which for some potential clients is a local holiday. E.g. nobody from Scotland would go to a work event on the 2nd January.
- It will probably be necessary to have access to the venue on the day before the event, so be wary of that being a weekend or local holiday.
- There must be sufficient time to prepare for the event.

Dates must be chosen for when to open registration for the event and actively publicise it. If that is too far in advance people may delay registering, intending to register later, and then forget about it. If it is not far enough in advance, people who would have wanted to come may be already committed elsewhere.

There must be a date for closing registration. There will be arrangements to make that are dependent on the number of clients, so the closing date must allow enough time for those arrangements.

3.3.4. Informal Interaction and Timetabling

Often a major potential benefit of a training event will be in the informal interaction between the participants. This is particularly important in the EGEE project, and NA3 has a specific task of engendering team spirit within the project. So for an event attended by people from diverse home locations, particular attention should be given to facilitating that interaction. For example –

- Leave time in the schedule to allow this: reasonably long lunch and coffee breaks; not going on late into every evening.

- If possible arrange that lunch and coffee are provided in one place specifically for the event rather than using public facilities.
- Recommend one, moderately priced, main hotel, where it is expected that most participants would stay, with secondary ones nearby.
- For an event stretching over several days, arrange at least one social event.
- If it is expected that people will arrive on the evening before the event starts, identify a time and place where participants could meet for the evening meal.

The last day of a multi-day event presents some difficulty in that typically some people will leave at various times during the afternoon due to travel considerations. Therefore final afternoon events may be increasingly sparsely attended. However something needs to be scheduled for the final afternoon because: maximum use should be made of the event for those who can stay; otherwise some people may be tempted to leave on the previous evening. Although it seems natural to have a final discussion/review on the last afternoon, this is a bad idea. Better is to have that on the final morning and use the final afternoon for supplementary material which is likely to be of interest, but not central to the purposes of the event.

Coffee breaks will always take 10 minutes longer than period declared for them in the timetable. Built into thinking about the schedule should be the possibility that everything will start 10 minutes late (but the participants shouldn't know that!), and that some presenters will over-run their allocated time. The organisation of refreshments may require that breaks occur when they are scheduled, but it is preferable if flexibility can be accommodated.

3.3.5. Pre-course Materials and Procedure

Most important is to ensure potential clients know about the event and are attracted to it. For internal EGEE events the primary mechanism is the events information on the NA3 web site. However that is a passive mechanism and some active publicising of the event will usually be required. The description of the event is crucial in setting the expectations of potential clients – this must be full, precise and accurate to reduce the risk of clients misunderstanding goals, content, assumed background etc.

Some kind of automated registration procedure is highly desirable. The hosting institute may have an established procedure which can be used. Alternatively NeSC can always provide a basic registration mechanism for any EGEE training event.

In most cases attending an event will require local hotel accommodation. Unless the hosting institute offers administrative support for booking accommodation, the approach should be to provide a list of hotels (preferably offering electronic registration) and allow the clients to make their own bookings.

The pre-course material should give very clear instructions for how to get to the venue, and generally as much information as possible about the structure and content of the event. Also there should be links for finding out about the location, e.g. to the local tourist information bureau.

An important question is whether participants are provided with some information about the other participants. It is recommended that everyone be provided with a participants list which gives for every client, presenter and organiser the information – name, affiliation, country, email, photograph if possible, two or three sentence about themselves in relation to EGEE and/or their grid interest – so that others know who they are and can pick out people they might wish to talk to. In a large, rapidly formed, project like this, anything which helps people new to the grid world to find their way around is important.

The registration process must positively allow for clients to inform the organisers of special needs, specifically: mobility limitations affecting access to and negotiation of the venue; vision or hearing limitations; special dietary needs. As far as practicable the organisers must accommodate these needs, and inform the client if there is any way in which they cannot be adequately accommodated.

3.3.6. Preparing for Post-event Review

The post-event review has two aspects that require preparation –

- Participants will need to return feed-back forms. The forms need to be prepared and made available
- There needs to be at least one person observing and evaluating each session, and recording questions and discussion. These roles need to be allocated.

3.3.7. Other Practicalities

The sister document on running an event provides a check-list for which most of the items require some attention early in the event preparation process.

3.4. EVENT COLLABORATION

3.4.1. Key Questions and associated Risks

- If there are several sites involved in developing and delivering the training material for a course, how is their collaborative work co-ordinated?
    - Risk: that inconsistencies between different course components are discovered late in the process.
    - Risk: that excessive time will be spent in sending and reading message communications between the collaborators.
- Who will check the quality of the event
    - Risk: self-checking of quality is un-reliable.

3.4.2. Discussion

The development of any training event will involve collaboration between at least two distinct NA3 partners – the *organising partner* who is actually running the event and, as NA3 policy, a *monitoring partner* which has the responsibility for reviewing and agreeing the main elements of the event, and checking that quality and reporting procedures are followed. If the organising partner is not NeSC, then normally NeSC will be the monitoring partner.

There may also be *supporting partners*, not necessarily NA3, involved in various ways such as: providing the venue, delivering training material, reviewing training material. There may be complex events where the preparation for the event requires multi-partner collaboration. For just one example a newly-developed course with several people preparing different parts of the training material which must hang together. In such cases there needs to be attention to three modes of (electronic) communication between collaborators – one-to-one message passing; broadcast message passing; shared memory. The most efficient is shared memory with sparse message notification – the material being developed is kept in a shared storage area and the author notifies relevant people when there have been major changes. Unless such a system is agreed and set up, there will be a tendency for a large amount of broadcast message passing which occupies a lot of time in generating the messages and reading them.

4. TRAINING MATERIAL GUIDELINES

This section gives guidelines and standards on the format of training material.

There are a number of areas of important quality considerations for which we cannot give detailed guidelines and standards. These are:

- The delivery of the material, i.e. issues such as voice articulation, good audience contact, sustaining audience attention.
- The design of a lecture, i.e. issues of logical content and developmental sequence.
- Graphic design of slides (although there are some basic guidelines below).
- The design of tutorial exercises, i.e. issues such as incremental learning.

These are skills which need to be developed through experience and feed-back. Within NA3 all training material should be reviewed by an experienced trainer with respect the above areas. If material is being prepared by someone with little training experience, then there should be a process of several drafts each reviewed by walk-through.

4.1. TECHNOLOGY

Training material will need to be accessed by the clients themselves both during and after the event, and may need to be used and developed by subsequent presenters. Therefore the material needs to be constructed within standard applications. The recommendations are: Microsoft PowerPoint for slides; Microsoft Word or plain text files for other written material. Alternatives to PowerPoint and Word are the equivalent for OpenOffice. If OpenOffice is used, a slide or other document should not use any feature which precludes it being exported to the corresponding Microsoft Office application.

4.2. SLIDE FORMATS

As a general rule a series of slides forming one presentation should have a consistent style and a common overall format. The EGGE standard for this is shown by example in https://edms.cern.ch/document/414583 [R4].

The first slide should give: Author name, affiliation, function, and e-mail address; event title and date; presentation title; copyright notice if appropriate; acknowledgement of funders if appropriate.

The second slide should give the talk outline and acknowledgement of source(s) if the material involves significant re-use of material prepared by someone other than the current presenter.

Each slide in the body of the presentation should, include a slide title and identification material: name of the event; name of the presentation within the event; date; slide number.

Apart from the very specific exceptions listed below, all text on a slide should be of a point size which makes it easily legible for the audience. If text is included on a slide, the audience will assume it is sufficiently important that they should try to read it, and will be frustrated if it is no easily legible. Normally text should not be less than 16pt, with 14pt the absolute minimum. The exceptions are as follows.

- The identification material for each slide in the body of the presentation does not usually need to be read by the audience. Thus it should be kept inconspicuous by being in a small font.
- A region of a slide is a representation of an entity which itself contains text and the purpose is to address the entity as a whole rather than the detail of its text. The most common example is screen shots shown to illustrate the overall appearance of part of an application interface. In that case the legibility of the detailed text is not an issue.

- A slide might contain detailed information, such as web resource URLs, which is reference material for use after the event and is clearly not expected to be read by the audience at the time.

4.3. PRINTING

For lectures, the audience should be provided with the opportunity of obtaining a printed copy of the slides and accompanying notes. For some people this provides a valuable vehicle of being able to mark down their private notes on the material as it is being presented.

The layout of slides on the page should be such that the text is legible and there is room for the addition of private notes. Which printing format to use depends on the size of text on the slides and there should always be a trial print-out to check legibility of all slides before printing them off for the audience.

A reviewer, either in a pre-event walk-through or a reviewer of the presentation at the event itself, should always have a printed copy.

4.4. SLIDE ANIMATION

In a slide comprising bullet-pointed text items, there is a choice as to whether all items appear at once or whether each item appears as the presenter gets to it. If all items appear at once, the audience **will** read later items whilst also listening to the presenter address the early items. In some circumstances this would be a distraction from listening to the speaker. In other circumstances it would be helpful in providing context for what the presenter is saying.

For complex animations, it is important to recognise that the printed version will be of everything on the slide. Where there are fade-ins and fade-outs or overlays, the printed version may be hard to understand. This can be dealt with by splitting the overall development of the slide into a number of slides.

4.5. ACCOMPANYING NOTES

For lecture slides there are three roles for notes –

A. To help the presenter during the presentation, typically reminders of what needs to be said.
B. To help the client after the event, typically explanations of the slides and points that were said by not included as slide text.
C. To help someone other than the author to present the same slides.

These are quite different roles and all three need to be explicitly addressed. C would usually be as a supplement to B. The recommendation is that the PowerPoint notes facility be used for A and C and that for each lecture there is a supplementary notes document covering B.

For tutorial examples, either as comments in the example, or as a separate document, there should be sufficient information for the client to understand the example when returning to it after some gap. There may need to also be notes for the benefit of subsequent presenters, particularly concerning potential pitfalls.

5. NA3 PRE-EVENT PROCEDURES AND CHECKLISTS

This section summarises the previous material as it applies to NA3 training events, and defines the pre-event procedures that must be carried out. The checklist items identify actions which must be done or areas which must be given explicit consideration, with items in bold being of particular importance.

5.1. EVENT DESIGN AND JUSTIFICATION

- All dimensions of learning outcomes and prior learning have been considered.
- The event description covers prior learning and outcomes in sufficient detail to enable potential clients to accurately decide whether the event is right for them.
- The likely minimum number of clients is sufficient to justify the event.
- The variation in clients, in terms of prior learning and outcome expectations, is not too great for a viable event.
- Potentials for networking and community building have been considered.
- The course design and justification is documented using the event proposal form described below.

All NA3 training events fall within specific categories identified in the Training Plan: Induction; Application Developer Training Courses; Advanced Courses. A subsequent draft of this document will here define the prior learning and learning outcome patterns which characterise these courses.

5.2. ASSEMBLY OF TRAINING MATERIALS

- Appropriate re-use/adaptation of repository material.
- Communicate to the NeSC team any deficiencies in repository material revealed.
- Judicious balance of training modes – Lectures; Discussions; Demonstrations; Tutorials; group-work.
- Availability and reliability of appropriate computing resources for intended demonstrations/tutorials, and availability of technical support.
- For tutorials, availability of suitable demonstrators.
- **Pre-event review of all presentational material*** – Content; Clarity; Continuity; Compatibility.
- Preserve all pre-event review comments until post-event review is done.
- Making material available to (potential) clients prior to the event, if practicable and considered desirable.
- **Testing of demonstrations and tutorial examples**.**
- All material confirming to consistent house-style and meet NA3 standards.
- Sources of re-used material acknowledged.

* The pre-event review of new or substantially modified material **must** be carried out unless it is completely impractical to do so, such that the only alternative would be cancellation of the event.

** Unless they are being used unchanged on exactly the same equipment, tutorial and demonstration examples must be thoroughly tested.

5.3. EVENT INFRASTRUCTURE AND PRACTICALITIES

- Active and passive publicising of event.
- Registration procedure in place.
- Check venue against course requirements.
- Allocate stage-manager responsibility.
- Provide sufficient participant information about practical arrangements.
- Facilitation of informal participant interaction.
- Check through items in the Running an Event document.
- Prepare feed-back forms.
- **Arrange reviewer(s)***
- Arrange notetakers

* If at all possible all sessions should be observed by a reviewer.

5.4. THE EVENT PROPOSAL FORM

There will be one event description form which is initially the event proposal form and evolves into the event completion form. The form has not been defined in detail. The proposal part will cover the areas identified below. In a future draft there will be an appendix giving examples of completed forms to illustrate what is expected.

Organiser: The institute, and an identified individual therein, to be responsible for developing and delivering the event.

Monitor: The institute, and an identified individual therein, to be responsible for monitoring the event.

Supporters: any additional institutes and individuals who are expected to be significantly involved in preparing or delivering the event.

Type: One of the above event types - Induction, etc.

Origin: How the need for the event was identified.

Client Set: A characterisation of the anticipated set of clients, geographically, organisationally and technically.

Possible Venue(s): Venues that are being considered for the event.

Date Range: The time window being considered for the event.

Duration: The number of days.

Client Numbers: The target number of clients, the viable minimum number and the maximum number possible.

Networking. Notes on what networking benefits can be expected to arise from the event and any particular ways in which networking potentials will be enhanced.

Funding Lines. Policy on registration fees, presenter expenses and other financial matters such as anticipated specific significant costs associated with the event.

Justification: A brief and preferably quantified explanation of why the proposer believes there will be sufficient clients for the event to be viable.

Prior Learning Pre-requisites: Except for an induction course, where this is standard.

Learning Outcomes: Except for an induction course, where this is standard.

Prior Learning Backgrounds. Comments on any particularities and variations in the technical background of anticipated clients that might affect the content and presentation of the training material.

Learning Expectations. Comments on any expected variations in clients' expectations

Draft Outline Structure. Preliminary structure of the components of the event, their sequencing and duration, with any information available as to source of training material and who will be presenting it.

Tutorial / Demonstration requirements. The required availability of computing systems to support demonstrations and/or tutorials.

Demonstrator Requirements. An estimate of the pattern of demonstrators needed to support tutorials and where they will come from.

Pre-event Review. The arrangements for pre-event review of the teaching material to be presented, or justification for absence of pre-event review.

Reviewer Observation. The arrangements for observation of sessions by event reviewer(s), or justification for absence of pre-event review.

As event preparations proceed the details in this form will evolve, becoming more a description of the actual event.

5.5. PROCEDURE FOR ESTABLISHING AN EVENT

5.5.1. Inception

The idea for an event is raised. This may be in response to an external request for an event via the NA3 training request process, to be detailed in a subsequent draft of this document. Alternatively an NA3 partner may decide there is an event they would like to organise, or NeSC may suggest an event to be organised by another NA3 partner.

5.5.2. Agreement

The organising partner submits to the monitoring partner an event description form as the proposal for the event. There may then be some discussion between the two partners until a version of the description form is agreed (or the event abandoned). That version is preserved as the event agreement form.

5.5.3. Development

There is then a process, covered further in section 7, in which the details of the event are elaborated and practical arrangements put in place.

During this process there will be a version of the event description form held within the EDMS system which records the progress of arrangements. This carries some of the same information as the AgendaMaker entry for the event, but will tend to be in more provisional form and record status and progress information.

For a simple event, with just the organising and monitoring partners, the organising partner would maintain the form and the monitoring partner would be able to read it. For an event with multiple collaborators, a more sophisticated approach would be required since this is the "shared memory" needed for efficient organisation of collaboration.

The following sections deal with key stages in the development process and with the interface between the organisers and the potential clients:

5.5.4. AgendaMaker entry

When an event is scheduled, and AgendaMaker "stub" should be created, even if it contains only the dates, location and title of the event. As details of the event become firm these should be added to the AgendaMaker entry, until it reaches a full form in which it should contain:

Main Entry

Details: Dates, times, venue, title, organiser, cost (if any)

Content: Purpose, Target Audience, Prerequisites and Learning Outcomes.

Practicalities: travel, accommodation (preferably links to hotel site/email), links to useful sites

Registration: a link to the electronic registration system for the event

Depending on how much information is provided, some of the Content and Practicalities information may be in separate pages linked to from the main entry.

Each Session Entry should have links to

Description: A document giving the specific prior learning pre-requisites and intended learning outcomes of the session

Presentation: The actual material to be presented during the event (e.g. PowerPoint slides, or text documents for tutorial examples)

Client Notes: Providing additional explanation or information for the client

5.5.5. Publicity

The standard URL to quote when referring to an event should be http://www.egee.nesc.ac.uk/shedreg/. As soon as the AgendaMaker entry has been created a general email should be sent to all (funded and un-funded) members of EGEE, using the email lists on the EGEE intranet pages.

For events intended for (also) people outside EGEE, additional publicity may be needed.

5.5.6. Registration

There are two options for registration:

Organiser-only Registration

The whole of the registration process is provided by the organizing partner.

NeSC-supported Registration

The organizing partner makes use of the NeSC web-based event registration facilities for the initial part of the registration process. Setting up the registration requires the following information being provided to the NeSC events team:

Event title, date and venue

Event organizer name and e-mail

Registration start and close dates

Respond-by date – the date by which the organizer will have responded to the applicant with a decision as to whether the applicant is accepted for the event

URL of the AgendaMaker entry for the event

The registration process is as follows. The applicant fills in an on-line application form. The system responds to the applicant informing them that their details have been passed to the event organiser and will be responded to by the respond-by date. The system sends an email to the organizer giving the applicants details. It is then up to the organizer to maintain records of applicants and communicate with them further.

6. POST-EVENT RECORDING AND EVALUATION

Evaluation of a training event and recording information about it is a central part of NA3 activities. There are a number of purposes to be served by this

- Continual improvement in the training offered, both within the EGEE initial 2 year frame, and in a wider context of generally improving grid training and thus facilitating grid uptake.
- Providing statistics as input to: activity and project progress reports and reviews; quality evaluation; input to NA3 planning for future training events.
- Maintaining a repository of high quality training material which can be used in future training events, in a way that is informed by the past experience of presenting that material.

At the completion of a training event, the following information must be provided to the NeSC central training team who will vet it and enter it into the repository.

6.1. IMMEDIATE FEED-BACK FORMS

Each client will be expected to complete a feed-back form, to capture their assessment of the event and their degree of satisfaction with it. Details of this will be supplied in a later draft.

6.2. PARTICIPANT LIST

A list of all participants, with their institution affiliations.

6.3. TRAINING MATERIALS

The finally presented versions of **all** training materials (lecture slides, supplementary notes, tutorial exercises) will be available via the AgendaMaker entry for the event. This is all material presented to the clients, with the exception of the actual path taken in multiple-path interactive demonstrations.

6.4. EVENT COMPLETION FORM

This is the penultimate version of the event description form. It covers the following

Client Numbers: The actual number of registered clients.

Client Set: The number of clients of each gender. For each nation state, the number of clients with that state as their residency.

Structure. For each item of training material used, its status, as either

Re-used: an identified existing repository item with minimal changes.

Adapted: an identified existing repository item with significant changes which are documented.

New: an item newly created for this event. This may include some re-used elements, which should be noted.

Post-event Review, covering the following areas:

Overall training material issues. Noting what was particularly good or in need of improvements, and recommendations in terms of subsequent presentations of similar material.

Organisation/Infrastructure issues. Noting areas where the organisation and event infrastructure worked particularly well or had limitations, and recommendations in terms of future use of the same infrastructure and/or future events by the same team.

Input to other Activities. A training event, particular one for EGEE users, provides an opportunity for obtaining information about user community expectations and (dis)satisfactions, and about potentials for EGEE dissemination and engaging further users. These needed to be looked for and explicitly noted so that the information can be used to inform developments in the project.

The review will be partly based on the following sources of information, which should all be perused by the reviewer(s) and where appropriate these should be specifically identified as supporting a particular observation or recommendation -

Client Feed-back forms.

Tutorial Logs. Each demonstrator keeps a log of client questions or difficulties.

Discussion and Question and Answer Notes. There should be notes taken during any general discussion session and during the question and answer part of a presentation.

Presenter Reports. Each presenter should provide a feedback report on their sessions and on the event as a whole.

6.5. FOLLOW-UP FEED-BACK FORMS

Some period after the event (typically two months) a follow-up feed-back form will be sent to every participant, aimed at determining how well the event has actually served their training needs.

6.6. FOLLOW-UP EVALUATION

After the follow-up feed-back forms have been received, there should be an addendum to the post-event review report noting anything additional arising from these forms.

7. FLOWCHART AND TIMINGS

In the current draft this has not been included. It will provide an event planning flowchart and guidelines for the timing of the various tasks.