

**Open Science Impact Pathways**

**Guide for Training Activities**

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# About

This document is designed to support the organisation of PathOS training sessions, contributing to the effective delivery of training events within the PathOS project. It forms part of the PathOS Training Toolkit, which will be publicly available on the OpenPlato Training Toolkit platform under a CC BY 4.0 license.

These guidelines are intended for organisers, moderators, and speakers involved in PathOS training sessions. The document provides a structured, step-by-step guide to ensure the consistent and effective delivery of training throughout the PathOS project.

**Acknowledgment**

This document was developed with the structure and inspiration provided by the TRIPLE Training Toolkit, available at <https://doi.org/10.5281/zenodo.7309919>. We are grateful to the TRIPLE project for offering a valuable foundation that guided the creation of the PathOS Training Toolkit

# Guidelines for Organisers

#### Before the Event

**Coordinate with WP5 Lead:**

* Initiate contact with the WP5 lead to discuss the planned training activity.
* Ensure alignment with the overall objectives and strategy of the PathOS project.

**Set Clear Objectives:**

* Define the goals of the training session to guide content, format, and speaker selection.

**Know Your Audience:**

* Tailor content and delivery to meet the needs and experience levels of your target audience.

**Choose the Right Format:**

* Decide whether the event will be online, in-person, or hybrid, considering the benefits and challenges of each.

**Develop Engaging Content:**

* Prepare informative, interactive, and relevant materials that cater to different learning styles.
* Incorporate the PathOS project's communication, engagement, and dissemination elements as outlined in the Communication, Engagement, and Dissemination Plan.
* Ensure that all materials comply with Horizon Europe’s publicity requirements, including the use of a CC 4.0 license.

**Set Up Logistics and Technology:**

* **For Online Events:**
	+ Use Microsoft Teams as the primary platform. Ensure the platform is reliable and test the technical setup in advance.
* **For In-Person Events:**
	+ Arrange a suitable venue and necessary equipment. Ensure accessibility features are in place for all participants.

**Create a Registration Form:**

* Use the provided template to create a registration form.
* Ensure consent for recording the event is included.
* Modify the form to include a link to the Zoom session or any alternative platform being used.

**Event Promotion:**

* Report the training event for promotion using the designated PathOS social media form.
* The WP5 lead will handle the dissemination of information through PathOS social media channels.

**Participant Communication:**

* Send invitations and reminders to participants, ensuring they have all necessary information, including the Zoom link, event agenda, and any preparatory materials.

**Technical Requirements and Testing:**

* Coordinate with speakers and moderators to address any technical requirements. Arrange a technical testing session if necessary.

**Prepare Feedback Mechanisms:**

* Feedback will be collected via MS Forms. Coordinate with the WP5 lead, who will manage the distribution and collection of feedback after the event.

#### During the Event

**Recording**

* Initiate, monitor, and securely store event recording, ensuring all participants are aware and managing any related privacy concerns effectively.

#### After the Event

**Track Attendance:**

* Record the number of participants and update the PathOS training event records.

**Upload and Share Materials:**

* Ensure all training materials, including recordings and presentations, are uploaded to the PathOS Training Toolkit on OpenPlato (contact WP5 lead for assistance).
* Upload all presentations and related documents to the designated SharePoint directory: [PathOS SharePoint Link](https://imisathena.sharepoint.com/%3Af%3A/s/PathOS/EvyMF16JqbBNknYob-mOTJ0BYjwE8Ogqt3U3iky6IUF_xA?e=ouaUTe).

**Distribute Post-Event Materials:**

* Share any relevant materials, such as certificates of participation, with attendees. Use the available templates in the Training Toolkit.

**Process Feedback:**

* Collect and analyze feedback from participants via MS Forms. Summarize key findings and report them to the WP5 lead.

# Instructions for Moderators

#### Before the Event

**Technical Setup:**

* Ensure familiarity with Zoom, including managing breakout rooms and Q&A sessions.
* Receive the Zoom link and any additional technical guidelines from the organiser.

**Event Preparation:**

* Review the list of pre-collected questions from participants and prepare to facilitate discussions.
* Use the PathOS presentation template, incorporating the project’s grant agreement number and other required elements.

**Consent and Documentation:**

* Obtain consent from all speakers for the recording and sharing of their presentations on the PathOS Training Toolkit.

#### During the event

**Introduction, Overview and Recording**

* At the start of each training session, briefly introduce the PathOS project, its key outputs, and the speakers/presenters.
* Inform participants at the beginning and remind them as necessary that the session is being recorded for future training and reference purposes.

**Manage Engagement and Timekeeping**

* Monitor and address questions and discussions in the chat, ensuring a smooth flow of interaction and timely responses.
* Lead the discussion with participants during session (usually at the end)
* Keep track of the time allocated to each speaker. Send private chat messages to speakers to inform them of the remaining time, ensuring adherence to the schedule.

#### After the Event

**Materials Submission:**

* Submit the session’s slides and video recordings to the WP5 lead for uploading to the PathOS Training Toolkit and other relevant platforms.

**Follow-up with Participants:**

* Ensure participants are informed about the availability of recorded sessions and additional resources.

# Instructions for Speakers/Presenters

#### Before the Event

**Technical Preparation:**

* Familiarize yourself with Zoom and any other tools to be used during the event.
* Test your equipment and internet connection in advance.

**Content Preparation:**

* Prepare your presentation using the PathOS template provided. Include the necessary references to the PathOS project and grant agreement.
* Ensure that all materials comply with Horizon Europe’s publicity requirements, including the use of a CC 4.0 license.

**Documentation and Consent:**

* By presenting at any PathOS training event, you agree to deposit your presentation and any other materials in the PathOS Training Toolkit and in future in PathOS e-learning.

#### During the event

**Moderation**

* Moderator will shortly introduce the PathOS project, its key outputs and the speakers/presenters at the beginning of each training session.
* The moderator will take care of the chat questions and discussions.

**Recording and Privacy**

* Please be aware that the session will be recorded for future training purposes.

**Presentation Timekeeping**

* Please ensure you adhere to your allotted presentation time; the Moderator will send you private chat messages to inform you of the time remaining.

#### After the Event

**Materials Submission:**

* Deposit your presentation and any associated materials in the designated [SharePoint directory.](https://imisathena.sharepoint.com/%3Af%3A/s/PathOS/EvyMF16JqbBNknYob-mOTJ0BYjwE8Ogqt3U3iky6IUF_xA?e=ZpUR0N)

**Feedback and Follow-up:**

* If you wish to add specific questions to the post-event feedback form, coordinate with the WP5 lead.

For additional support or inquiries, please contact the WP5 lead: Tereza Simova (tereza.simova@openaire.eu).

# Annex

## Check-list for the organizer

Check-list will be available for each training event in a [training folder on SharePoint](https://imisathena.sharepoint.com/%3Ax%3A/r/sites/PathOS/Shared%20Documents/On-Going%20Work/WP5/Training/01_Traininig%20Events/Check-list_template.xlsx?d=w33b0b08e6da143d58691370c5d8c54b7&csf=1&web=1&e=1wQZqN).

