



Coordinated Research Infrastructures Building Enduring Life-science services - CORBEL -

Deliverable D9.2

New course syllabi for a modular curriculum for piloting in RIs

WP9 – Training

Lead Beneficiary: BBMRI-ERIC

WP leader: Markus Pasterk (BBMRI-ERIC)

Contributing partner(s): EMBL-EBI, BBMRI-ERIC, DSMZ

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Executive Summary

Our main target audience of the CORBEL training programme is technical operators of Research Infrastructures (RIs) in biological and medical RI hubs and nodes. The CORBEL course syllabi for a modular curriculum for piloting in RIs involves the following types of training activities: webinar programme, training courses and workshops, and a staff exchange programme. The content of the curriculum has been based on the development of the CORBEL competency profile (D9.1 - CORBEL Refined organisational competency framework needed by distributed RIs at 3 development stages - <https://zenodo.org/record/154085#.WYGGb4jys2w>) and the gap analysis that was subsequently completed.

The first CORBEL training course, “Data Visualisation for Biology: a practical workshop on design, techniques and tools” and the pilot webinars “Identifying and Networking with Industry: How to Market Your Research” and “User Experience Design for more user-friendly applications” respectively by speakers from EATRIS and EMBL-EBI, have been completed. The staff exchanges programme is underway and the call for participants in out for the 2017 staff exchanges (<http://www.corbel-project.eu/work-packages/wp9-training/wp9-staff-exchange.html>), which will take place in October 2017.

This deliverable will focus on the types of training activities and the procedures that have been established during the pilot activities and by taking advantage of the best practice shared by other relevant training initiatives (e.g. ELIXIR¹, Ritrain², BioExcel³). These include metrics to describe training courses, templates for post- event feedback surveys and a detailed checklist on how to organise a CORBEL webinar. D9.3 (delayed to end of October 2017) will focus on the content and impact of the delivered pilot activities.

Project objectives

With this deliverable, the project has reached the following objectives:

- a) Develop indicative content to fulfil competency requirements in those areas where no training (or inadequate training) exists.

With this deliverable, the project has contributed to the following objectives:

- a) Deliver courses and provide a staff-exchange programme to support sharing of best working practice.

The work described in this deliverable relates to task 9.3: Developing and delivering training to fill the gaps.

¹ <https://www.elixir-europe.org/>

² <http://ritrain.eu/>

³ <http://bioexcel.eu/>

Detailed report on the deliverable

Type of activities

The CORBEL course syllabi for a modular curriculum for piloting in RIs involves the following types of training activities:

Webinar Programme: The CORBEL webinar series aims to address challenges and share best practice between biological and medical research infrastructures. The webinar series is aimed at technical operators of RIs and is aligned with the CORBEL competency framework. CORBEL webinars include an audience Q&A session during which attendees can ask questions and make suggestions.

All webinars are recorded and available for posterior viewing on the CORBEL website

(<http://www.corbel-project.eu/webinars.html>).

Training Courses & workshops: Similar to the webinar series, CORBEL training courses and workshops aims to address challenges and share best practice between biological and medical research infrastructures. Training courses and workshops will align with the CORBEL competency profile.

Staff Exchange programme: The purpose of CORBEL Staff Exchanges is for a small number of operational staff from the Research Infrastructures participating in CORBEL to develop operational expertise in four areas – data management, service provision, innovation and ethics – by making short knowledge-exchange visits to other Research Infrastructures (RIs) that are noted for their excellence in the same area.

Webinar programme

The webinar checklist below is akin to a standard operating procedure and has been based on the lessons learned from the two CORBEL pilot webinars and based on the BioExcel webinar programme and procedures (<http://bioexcel.eu/category/webinar/>). Where possible the person responsible for a task has been indicated. A live version of the webinar checklist is available in the project google drive and will be kept up to date by WP2 and WP9.

CORBEL Webinar Checklist

1. Format of the webinar

CORBEL webinars run for approximately 45min and include a live Q&A session. A host (currently Vera Matser) briefly introduces the CORBEL project, the webinar topic and the webinar speakers. The host will also lead the Q&A session.

Webinars are recorded and uploaded to YouTube/CORBEL website.

Suggested time slot: Tuesday 14:00 BST/15:00 CEST

If you have a suggested speaker for a webinar please contact Vera Matser (matser@ebi.ac.uk).

2. Webinar Platform

Two options are available - contact Vera Matser (matser@ebi.ac.uk) to discuss

- EMBL-EBI GoToTraining
 - Only possible if the webinar is hosted by EBI staff and time/date does not clash with EBI webinar series
- CORBEL GoToMeeting
 - Has less features available, permalink established
 - Necessitates creating a registration link in EventBrite
 - Inform Friederike Schmidt-Tremmel of date and time to avoid clashes (friederike.schmidt-tremmel@elixir-europe.org) with the CORBEL consortium.

3. Organising the webinar

The following material is needed to organise and advertise the webinar:

- Proposed date for the webinar
 - Date should be at least 1 month after initial publication
 - Suggested time slot: Tuesday 14:00 BST/15:00 CEST
- Title of the talk
- Abstract (including who the target audience is)
- Featured image for the abstract and use in social media
- Speaker biography
- Speaker photo
- Registration link from the webinar platform (liaise with Vera Matser).

Please send this information to Manuela Schüngel (WP2 - Manuela.Schuengel@dsmz.de) and CC in Vera Matser (WP9 - matser@ebi.ac.uk)

4. Tasks and Timeline

ONE MONTH BEFORE THE WEBINAR

Setup Webinar (to be completed)

Website Webinar Page (<http://www.corbel-project.eu>)

- Create Webinar page based on information sent by the organiser
- Test the link provided

Feedback Form (drive.google.com)

- Go to the WP9/Webinar folder in Google drive and copy the template feedback form
- Change BOTH the name of the form AND the title
- Use the new URL (preferably use a short-url) to update the post webinar email template

Dissemination of the webinar announcement

Once the webinar details are published on the CORBEL website (i.e. one month before the seminar, as described above), the promotion of the webinar begins:

- [Manuela] email to the CORBEL consortium to inform them

- [Manuela] email to the RI communication officer, they shall inform their RI partners and disseminate the announcements via their communication channels
- [Manuela] tweets announcing the webinar, directing the users to the website; tweets will be placed in regular intervals until the seminar takes place
- [Manuela] send announcement to contact persons from ERA-Nets, JPIs, IMI, etc.
- [Manuela] announcing the seminar on ResearchGate
- [Manuela] add webinar announcement to the CORBEL newsletter.

ONE WEEK BEFORE THE WEBINAR

- [Manuela] send reminder to the RI communication officers
- [Manuela] daily tweet promoting the webinar, encouraging people to register

TWO DAYS BEFORE THE WEBINAR

- Collect slides from the presenters
- Include introductory slides - use the template from CORBEL Google Drive (WP9)
 - change title, date, presenter info, and next webinar on the last slide
- Run a test seminar with the presenters a few days in advance. Explain how the questions will be selected and offered
- Host and speakers should identify a couple of questions for the webinar.
- Ask panelists to connect 20min earlier on the day of the event

WEBINAR DAY

- Connect at least 20 min. before the scheduled webinar time.
- Send a private message to presenters to communicate only with messages, depending on the platform the broadcast is started immediately
- Prepare slides
- Use a “clean desktop” - close all applications that are not in use
- Go in full screen mode
- Select what to “Show” and click on the triangle
- Click on “Record” (do this as early as possible, webinar will be edited anyway!)
- Explain in detail how the listeners can ask questions and remind them the webinar is being recorded.

AFTER THE WEBINAR IS FINISHED (youtube.com + slideshare.com + website)

- [Organiser] Edit the webinar in a movie editor
- [Organiser] Upload the movie to CORBEL’s channel on youtube.com
- [Organiser] Send the YouTube link to Manuela (WP2)
- [Manuela] Embed the newly made, stitched, video to the webinar’s webpage on <http://www.corbel-project.eu>. Use larger, e.g. 640x360 size and disable related videos.

- Upload slides to SlideShare (Manuela, Vera and Friederike have the account details) + add a link to the webinar's webpage
- A week later, save as PDF all responses from the feedback form and upload to Google Drive

Suggested text for follow-up email to attendees

We hope you enjoyed our webinar! We'd very much like to make future editions as valuable as possible to participants. Please, let us know about your experience and expectations. That will help us make future webinars more useful for you. The survey has just a few, very short questions:

<https://goo.gl/XXXXXXXX> - USE THE CORRECT URL

If you want to see the webinar again (or share it with your colleagues), you can find a recording on our website www.corbel-project.eu/webinars. There we keep an archive of previous events that we hope you will find useful in your day-to-day activities.

Looking forward to seeing you soon!

Suggested text for follow-up to absentees

We're sorry you weren't able to attend our webinar.

If you want to see the webinar (or share it with your colleagues), you can find a recording at our website www.corbel-project.eu/webinars. There we also keep an archive of previous events that we hope you will find useful in your day-to-day activities.

Follow-up actions

- [Manuela] email to the CORBEL consortium to inform the recorded webinar is online
- [Manuela] email to the RI communication officer, they shall inform their RI partners and disseminate via their communication channels that the recorded webinar is online
- [Manuela] tweets that the recorded webinar is online
- [Manuela] informs users via ResearchGate that the recorded webinar is online

5. Tips & Tricks

- Having more than 1 speaker can help with the dynamic of the webinar if you would like to encourage discussion
- Have a few questions prepared in advance, the host can start with that question while the attendees add their questions to the chat panel.
- Speaker handovers are the most likely fail points, avoid these if possible. Test in advance if the speaker slides display the presenter mode automatically. This needs to be turned off as the screen share will display the presenter mode.
- Turn on recording as early as possible to avoid forgetting it, any additional time can be editing afterwards.

6. Future Considerations

- Consider adding a backup organiser/host
- Consider upgrading to GoToWebinar to automate tasks

Training courses and workshops

The descriptors and metrics below are in accordance with the ELIXIR quality and impact guidelines formulated during the EXCELERATE Train-the-trainer and Training Impact workshop in January 2016 (https://docs.google.com/document/d/1KO3-njXVINsihXjkm3qtVI6mZlteC7XWzsMPQy_5k7Y/edit?usp=sharing).

Descriptors for training courses or workshops

The following minimum requirements to describe a course or workshop have been formulated in accordance with the ELIXIR quality and impact guidelines.

- Title of course
- Course logistics: start/end dates, venue, organizer/course contact
- Course overview: brief description of the course
- Course target audience: description of the intended audience, including any required prerequisite knowledge.
- Core syllabus / resources/tools used
- Learning outcomes: in bullet point format, ideally using active verbs and bloom's taxonomy. "After this course the participant should be able to .."

Quantitative metrics for individual training events

The following minimum demographic information should be collected for the event, ideally upon application/registration to attend the course, or alternatively the information will be integrated in the post course survey. These metrics are consistent with the ELIXIR Impact and quality guidelines.

- Number of applicants
- Number of attendees
- Gender of applicants/attendees
- Career level
- Country of employment
- Where did you hear about the course?
- Academia/industry/healthcare

Post-course feedback form

Below is a text version of the post-course or post-workshop participant feedback form. The survey questions are in accordance with the ELIXIR quality and impact guidelines. The original template is in a SurveyMonkey online form and carries CORBEL branding. The template will need to be amended for each specific event. A link can be send out to the participants either at the end or after the course.

Template - Course feedback survey

CORBEL collects feedback from every course and workshop we run. The survey is a way for you to inform us about the course you have participated in, what you enjoyed, what you found useful and how we can make improvements. This information is also used to inform the development of new courses and workshops.

Where possible, please take the time to provide written answers and explain as much to us as you can.

About you

This section asks for a few personal details.

We may want to contact you about future CORBEL courses and to gather long-term feedback.

You do not need to provide these details if you do not want to. CORBEL will not use your personal details for any purpose other than that stated above. We will not pass your details to any third party.

1. Name
2. Email
3. May we contact you by email in future to take part in user research activities ?
 - Yes
 - No

Course content

This section asks for your thoughts on the content and delivery of the course.

- * 4. Please tell us your overall rating for the entire course.

Poor
Satisfactory
Average
Good
Excellent

- * 5. Please rate each section of the course (matrix format)

Did not attend
Poor
Satisfactory
Average
Good
Excellent

Session 1
Session 2
Add rows as needed
Comments

- * 6. What was the best part of the course?
- * 7. What was the worst part of the course?
- * 8. The balance of theoretical and practical content across the course was
- Too practical
About right

Too theoretical

9. * Have you used the resources covered in the course before?

Unaware of them

Used other service

Occasionally

Frequently

Other (please specify)

* 10. Will you use the tools/resources covered in the course in your future work?

Yes

No

Maybe

Comments

* 11. Would you recommend this course?

Yes

No

Maybe

Comments

Course logistics

This section asks for your thoughts on the organisation of the course.

* 12. The overall course organisation (including: registration, accommodation, host assistance) was:

Poor

Satisfactory

Average

Good

Excellent

Comments

* 13. The catering provided during the course was:

Poor

Satisfactory

Average

Good

Excellent

Comments

* 14. The accommodation you stayed in during the course was:

Poor

Satisfactory

Average

Good

Excellent

Comments

15. Any other comments?

Thank you on behalf of the CORBEL project for taking the time to complete this survey. It is your feedback that helps us to improve and maintain high training standards.

Staff Exchange Programme

The following procedure is followed to organise the CORBEL staff exchange process:

Call proposal for host: The first call for hosts for the CORBEL staff exchange programme was distributed in February 2017, with a deadline of 31st March 2017. The proposed topics for the 2017 Staff Exchange are aligned with CORBEL's highest priority competency requirements and represent the biggest gaps:

- Interactions with users and user relationship management related to the CORBEL services and their target user community, including identification of user needs, user experience, user support, user training, customer support practices, problem solving/troubleshooting with users, health and safety for visitors requiring physical access to research infrastructures, and client liability.
- Sustainability issues, including funding, of planned or existing services
- Ethical and legal frameworks underlying specific scientific areas of participating BMS RIs and services
- Communication with agencies and ethical boards
- Handling of confidential information

The full call text for 2017 has been added to Appendix 1.

A total of four applications for hosts were received and evaluated by the leaders of work package 9. All four proposals were accepted. The four successful proposals covered two of the topics; two proposals for Ethical and Legal Framework (ECRIN-ERIC and BBMRI-ERIC) and User Relationship Management (CCMAR - EMBRC and INSTRUCT). The organisers of the staff exchanges have liaised together to align the staff exchanges on the same topics.

Call for participants:

The procedure for attracting applicants to the available staff exchanges has been streamlined. A template online application form has been developed using SurveyMonkey which each staff exchange organiser has customised to their needs.

All information on the 2017 staff exchanges is available through the CORBEL website:
<http://www.corbel-project.eu/work-packages/wp9-training/wp9-staff-exchange.html>

The 2017 staff exchanges will take place in October 2017. Prior to the first staff exchange a template feedback form will be created based on the course feedback template. The staff exchange organisers will be asked to submit a limited set of event statistics, similar to the demographics information collected for training courses or workshops.

Next steps

- We will continue to deliver webinars after the summer break, the staff exchanges will go ahead in October 2017 with the call for host for the 2018 staff exchanges expected to be out towards the end of 2018. We expect the 2018 call to be bottom up (offered or requested topics) as well as top down (competency driven).
- D9.3 will report on the content and lessons learned from the pilot activities.
- In collaboration with WP4 we will deliver a training module at the Technical Operators face-to-face meeting, expected to take place early 2018. We will also use this opportunity to request suggestions for webinar speakers/topics and requested training courses.

Delivery and schedule

The delivery is delayed: Yes

Deliverable D9.2 was delayed to allow the work package to learn from the pilot webinars prior to submitting the report. The delay was approved by the PO at the 7 July 2017.

Appendices

Appendix 1: CORBEL staff exchanges: Call for Hosts 2017

You are invited to take part in a call to host a staff exchange.

The purpose of CORBEL staff exchanges

The purpose of CORBEL staff exchanges is for **operational staff from CORBEL beneficiaries Research Infrastructures** to develop operational expertise in 4 areas data management, service provision, innovation, and ethics by making **short knowledge-exchange visits** to other research infrastructures that are noted for their excellence in the same area. The staff exchanges form an **integral part of CORBEL's WP 9 tasks**.

What does a staff-exchange entail?

Every RI has its strengths and weaknesses. We are asking you to **identify the areas of the four subareas of CORBEL focus – namely user access, data management, ethics and innovation - that your RI excels in**, and to submit an application to host a **short knowledge-exchange visit (2–5 days)** in which key members of personnel from the host RI coach visitors from other participating RIs.

The format of these visits will be relatively **informal** and is likely to involve no more than **a few days of preparation**, although we are of course open to more ambitious proposals.

Suggested format

We anticipate that you will want to begin the visit with a welcoming presentation describing your RI and its activities in the area that you have defined. At this point, you might also want to introduce the experts round the table and their involvement in these activities.

We will ask your visitors to identify the challenges that they face in your identified topic area when they apply to participate in the staff exchange; they will be asked to present these during the visit.

You might wish to time your visit so that it coincides with a staff-training course on the area in question, to which you would invite your visitors. We do not regard this as an essential part of a staff-exchange visit, although we are encouraging participating research infrastructures to open up a few places to those from other research infrastructures where this is appropriate.

The remainder of the visit is likely to involve small groups of visitors and hosts working together to brainstorm on the visitors' challenges.

Towards the end of the visit, you might want to have a round-up session in which the outcomes and next steps are defined.

Closing date and review process for staff exchange proposals

Please email your proposal using the form below to Markus Pasterk (admin.dir@bbmri-eric.eu) **by 12:00 midnight GMT on 2nd March 2017**.

A panel will oversee the review of applications, to ensure an unbiased and transparent review process. Staff exchanges need to be completed and reported on by 31 July 2017.

You will be informed as to whether your organisation has been selected to host a staff exchange by **end of March 2017**.

Suggested topics

The following topics are aligned with **CORBEL's highest priority competency requirements and represent the biggest gaps:**

- 1) Training opportunities that address all aspects of interactions with customers and customer relationship management related to the specific services and its target user community (Identification of user needs/ User experience/ User support/ User training, facilitation/ customer support practices/problem solving/ health and safety for visitors requiring physical access and client liability)
- 2) Sustainability issues (incl. funding) of planned or existing services
- 3) Ethical and legal framework underlying specific scientific areas of participating BMS RIs and services
- 4) Communication with Agencies and Ethical Boards
- 5) Handling of Confidential information

Suggested length

2–5 days

Number of participants

For this round, we propose a maximum of 3-5 visiting participants. You may involve as many host participants as you feel appropriate.

Reimbursement

CORBEL (via BBMRI-ERIC) will cover subsistence costs for visitors; as partners in the CORBEL project you may also charge additional staff time to your own CORBEL budget allocation to organise and deliver the programme. The visiting delegation is expected to cover its own travel and accommodation cost as a demonstration of commitment to the staff exchange. Claims need to be made within BBMRI-ERIC policy (see below) and shall not exceed €2000.

Important information from BBMRI-ERICs expenses policy

- Expenses should be submitted as soon as possible after they have been incurred, with an expectation that they will be submitted within three months.
- Expenses submitted more than six months after they have been incurred will be rejected
- The original receipts must be submitted for all claims
- A record of the number of attendees and the organisation(s) they represent must be kept and included with the claim

What is CORBEL and how will it benefit your research infrastructure?

Through a user-led approach, CORBEL will develop the tools, services and data management required by cutting-edge European research projects: collectively the BMS RIs will establish a sustained foundation of collaborative scientific services for biomedical research in Europe and embed the combined infrastructure capabilities into the scientific workflow of advanced users. Furthermore, CORBEL will enable the BMS RIs to support users throughout the execution of a scientific project: from planning and grant applications through to the long-term sustainable management and exploitation of research data. By harmonising user access, unifying data management, creating common ethical and legal services, and offering joint innovation support CORBEL will establish and support a new model for biological and medical research in Europe.

This will foster greater cooperation among the RIs and help to develop a mobile, multidisciplinary workforce with the potential to work across RIs.

Application to host a CORBEL staff exchange

Please complete this form and send it by email to Markus Pasterk (admin.dir@bbmri-eric.eu) **by 12:00 midnight GMT on Sunday 26th February 2017.**

You will be informed as to whether your organisation has been selected to host a staff exchange by **end of March.**

Organisation where the staff exchange will be held (mandatory)

| | |
|------------------------|--|
| Organisation/RI | |
| Division or Department | |
| Address | |
| Address | |

Staff exchange topic (mandatory)

Please select **one** topic from the following list:

- 1) training opportunities that address all aspects of interactions with customers and customer relationship management related to the specific services and its target user community (Identification of user needs/ User experience/ User support/ User training, facilitation/ customer support practices/problem solving/ health and safety for visitors requiring physical access and client liability)
- 2) Sustainability issues (incl. funding) of planned or existing services
- 3) Ethical and legal framework underlying specific scientific areas of participating BMS RIs and services

- 4) Communication with Agencies and Ethical Boards
- 5) Handling of Confidential information

OR other (please specify)

Start date and duration (mandatory)

a. Proposed start date

dd/mmm/yyyy

b. Duration of the staff exchange

_____ days

Applicants (mandatory)

| Role | Name | Organisation | Division or Department | How many hours per day will be contributed to the staff exchange? |
|------|------|--------------|------------------------|---|
| | | | | |
| | | | | |
| | | | | |

Objectives (mandatory)

List the main objectives of the staff exchange in order of priority [up to 4000 characters with spaces]

Summary (mandatory)

Describe the proposed staff exchange in lay terms [up to 4000 characters with spaces]. We will use this summary to announce your staff exchange to other RIs should your application be successful. If you plan to centre your exchange around a staff training course, please mention this here.

| |
|--|
| |
|--|

Benefits (mandatory)

Describe how the participants will benefit from the staff exchange [up to 4000 characters with spaces].

| |
|--|
| |
|--|

Summary of Resources Required for Staff Exchange

Financial resources

| Fund heading | Requested from CORBEL | In contribution organisation | –kind from |
|------------------|-----------------------|------------------------------|------------|
| Staff | 0.00 | | 0 |
| Subsistence | 0.00 | | 0 |
| Other Costs | 0.00 | | 0 |
| Sub-total | 0.00 | | |
| | | | |
| Total | 0.00 | | |

Summary of staff effort requested

| | Days |
|--------------|----------|
| Manager | 0 |
| Investigator | 0 |
| Researcher | 0 |
| Other | 0 |
| Total | 0 |

Subsistence

| Destination and purpose | | Total € |
|--------------------------------|--|----------------|
| | | |
| Total € | | 0 |

Other Directly Allocated Costs

| Description | Total € |
|--------------------|----------------|
| | 0 |
| Total € | 0 |