

How to Organize a Training Event: HSF Experience



Alexander Moreno Briceño
Universidad Antonio Nariño

... And many many more!



Deep Learning Train-the-Trainer Workshop
Sep 15-19, 2025

Share a few tips to help keep everyone on the same page before, during and after a training event...



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Deep Learning Train-the-Trainer Workshop
Sep 15-19, 2025

I would like to organize a training event

Organizing the event carefully is very important to ensure that it is effective

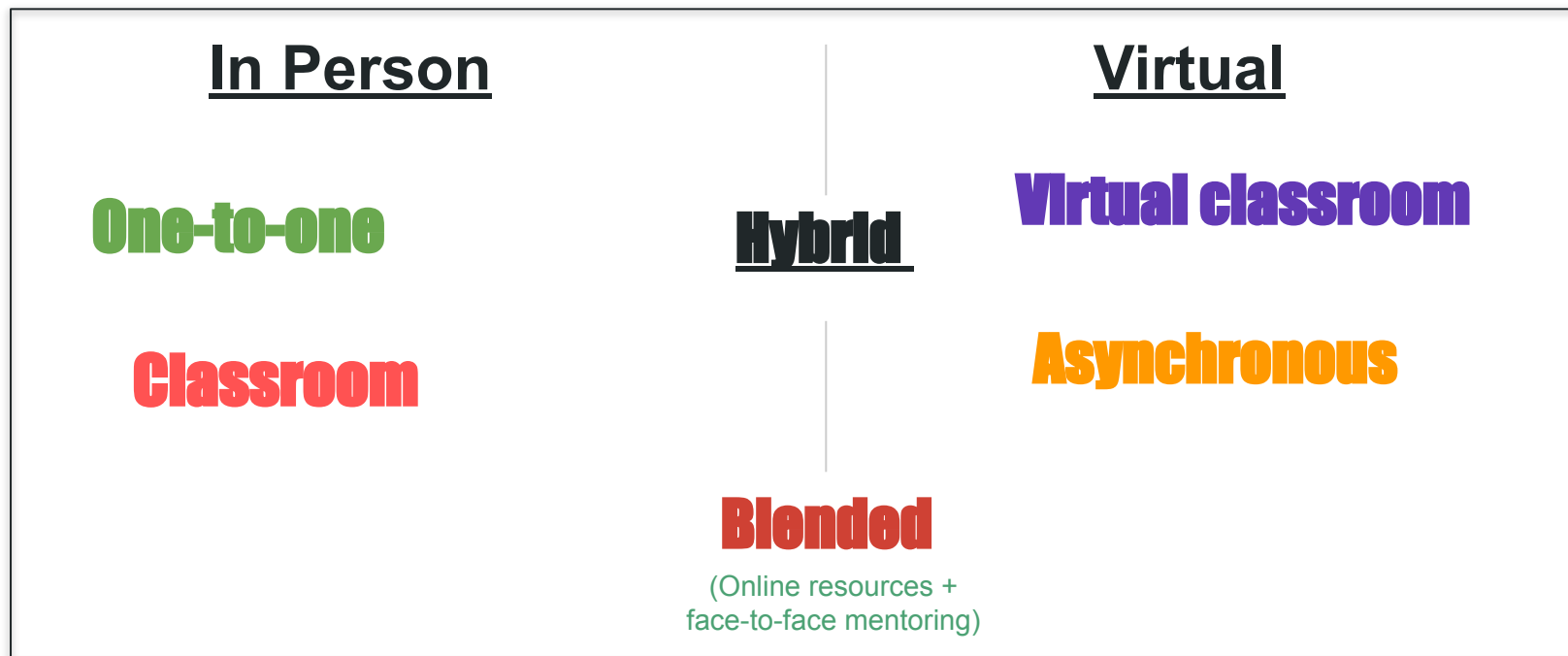
- What will you be teaching? (Michel's talk)
- What type of event are you holding?
- Who will do the educating?
- What do I need to do to organize this thing?
 - Do I care about gathering information on the event? (Surveys)
- What does the event look like when we gather?
- How do we evaluate the event?



What type of event are you holding?

Give some concerted thought about which is more appropriate for your education goals!

Event types



Event types

In Person

- More fluid interactions between educators and participants
- Builds a community and network
- Near 100% of the attention of participants
- Logistical challenges with rooms - internet connection
- Less equitable - Only for those with the ability to be in the room

Virtual

- Broader reach, more equitable
- Easier logistically: no rooms to book, no need to travel
- Can be asynchronous: pre-recorded lessons with experts reachable via chat
- Attendance is ~50% of registration
- Participants may be trying to multi-task and get distracted
- Networking is challenging

Who will do the educating?

The Roles for a Training Event

Three broad “Educator” roles are necessary

- **Facilitator**
 - Sends all the emails, organizes the agenda
 - Makes sure everyone is on the same page
- **Instructors**
 - The experts on one of the given training modules
 - In an in-person event, they are in the front of the room
- **Mentors**
 - Energetic and eager individuals who know the material to varying degrees and are willing to help teach others. Once you know the target attendance, have at least 1 mentor for every 5-10 participants



What do I need to do to organize this thing?

If you have organized a workshop/conference yourself, some of this may already be intuitive to you. Likewise, some of it may not...

If you have an alternative approach, we would love to learn from your experience!



Checklist

It is important to have a common and shared point of documenting the development of material, todo lists, emailing drafts, etc. that will need to be developed throughout the planning of your event.

- Agenda (Indico)
 - Links or attachments with training modules
- Code of conduct
- Registration form
 - Include pre and post-surveys
- Email templates
 - Advertisements, information for participants, reminders
- Channels of communication between participants and educators (Slack, Mattermost,...)



Figure: generated with DALL·E 3

Checklist - Before the Training



Checklist Software Basics September 15-19

'25

Let's streamline our organization and

⚠ Always copy the [blank version](#) of this check

Planning Software Basics (September 3-4
'25)

swb-jun25

Messages Training ? File not found Files +

Training



HSF/IRIS-HEP Software Basics Training at CERN (Hybrid)

indico.cern.ch



Zoom

cern.zoom.us



Timetable

indico.cern.ch

- post-survey. Remember to change the 'em
- ☐ Make sure that google pre-survey forms return a confirmation code.

Conceptualization

- ☐ Check last post-mortem for things to improve on the next time

Checklist - Before the Training

Recruitment



**Alexander
Moreno
Briceño**

*Associate Professor
Universidad Antonio Nariño
alexander.moreno@uan.edu.co*

My research:

Top quark physics at present and future colliders, in particular top quark spin correlations and top quark production and decay in association with DM.

My expertise is:

Theoretical and computational calculations in HEP

A problem I'm grappling with:

Machine learning and quantum machine learning in HEP and beyond...

I've got my eyes on:

My little baby boy

I want to know more about:

The Universe, and specially how to manage my time to know more about the Universe

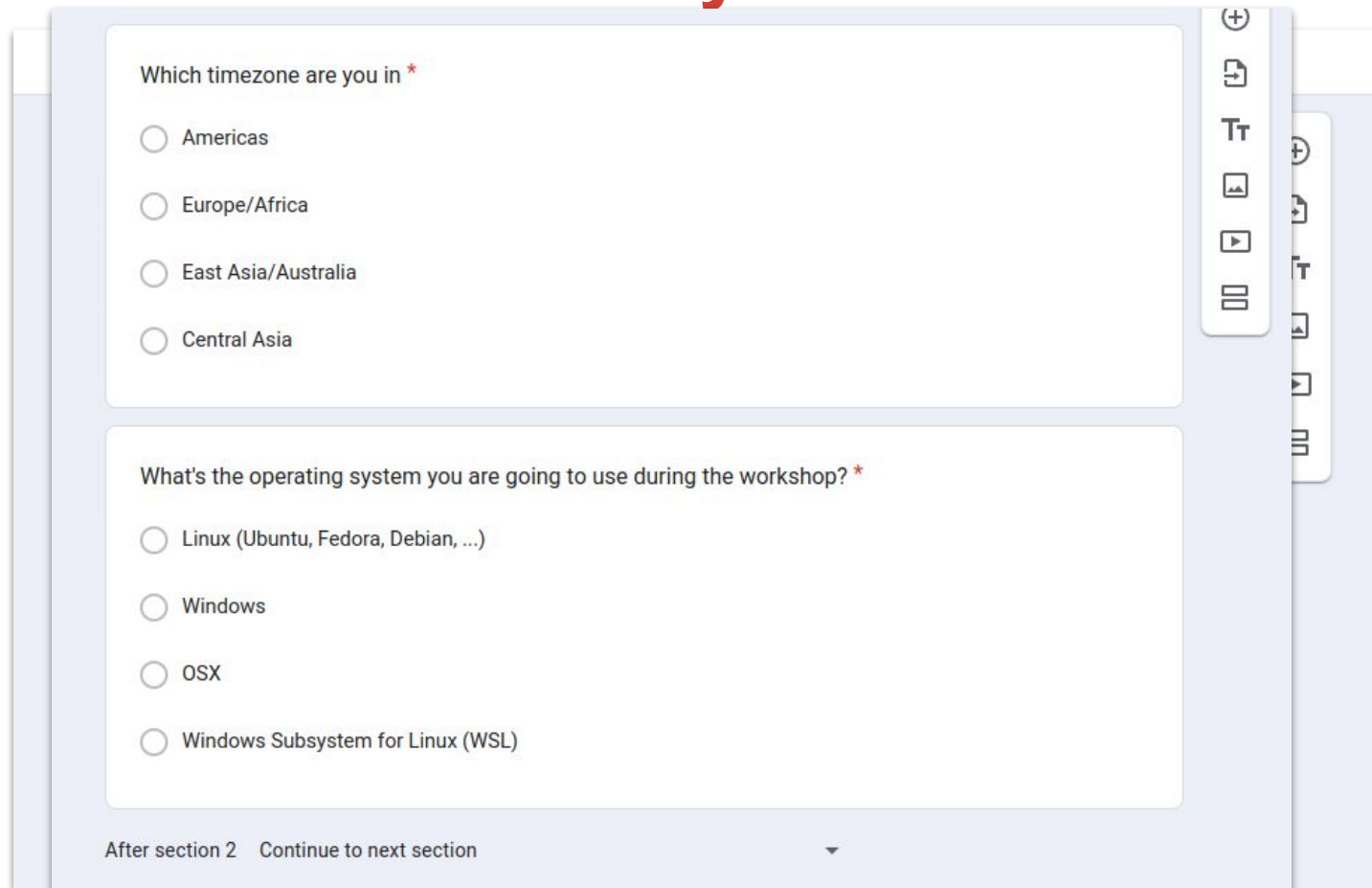
Do I care about gathering information on the event?(Surveys)

- “Adult learners are motivated when the content is personally relevant, honors their expertise, and builds upon their prior knowledge” ¹
- Gathering data about the audience is a crucial step in designing training that supports all learners

Yes!!!

¹ M. Knowles, seen at [Google Certified Trainer Course](#)

Checklist - Pre-Survey

A screenshot of a web-based pre-survey form. The form is light blue and has a sidebar on the right with various icons. It contains two sections of radio button questions. The first section asks for the user's timezone, and the second section asks for the operating system they will use during the workshop. At the bottom, there is a navigation bar with a button to continue to the next section.

Which timezone are you in *

- ☐ Americas
- ☐ Europe/Africa
- ☐ East Asia/Australia
- ☐ Central Asia

What's the operating system you are going to use during the workshop? *

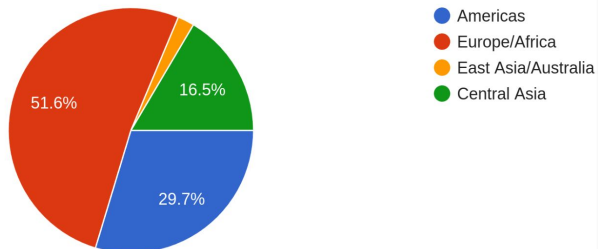
- ☐ Linux (Ubuntu, Fedora, Debian, ...)
- ☐ Windows
- ☐ OSX
- ☐ Windows Subsystem for Linux (WSL)

After section 2 Continue to next section

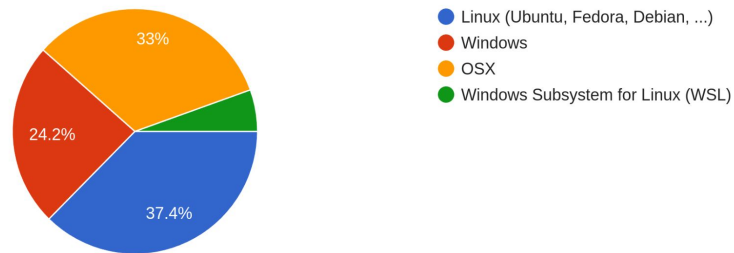
Pre-training Survey

Some results...

Which timezone are you in
91 responses



What's the operating system you are going to use during the workshop?
91 responses



Checklist - Pre-Survey

Section 3 of 6

How comfortable are you with the following topics in the Shell/Bash?

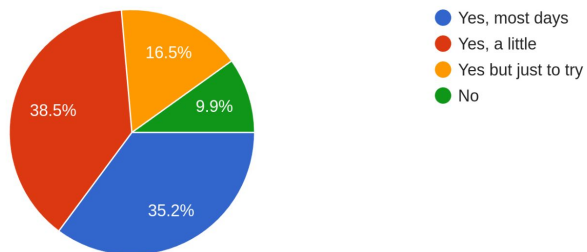
	Never heard of it	Used it once	Familiar	Very familiar
Navigation Comm...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Command Flags	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Man pages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The \$PATH	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wildcards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Piping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If/Control Stateme...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Pre-training Survey

Some results...

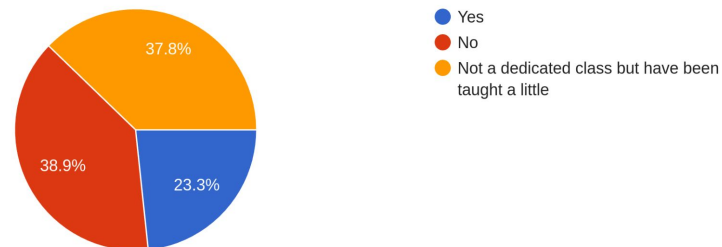
Have you used Unix (e.g. shell, bash and scripting) before in the past?

91 responses



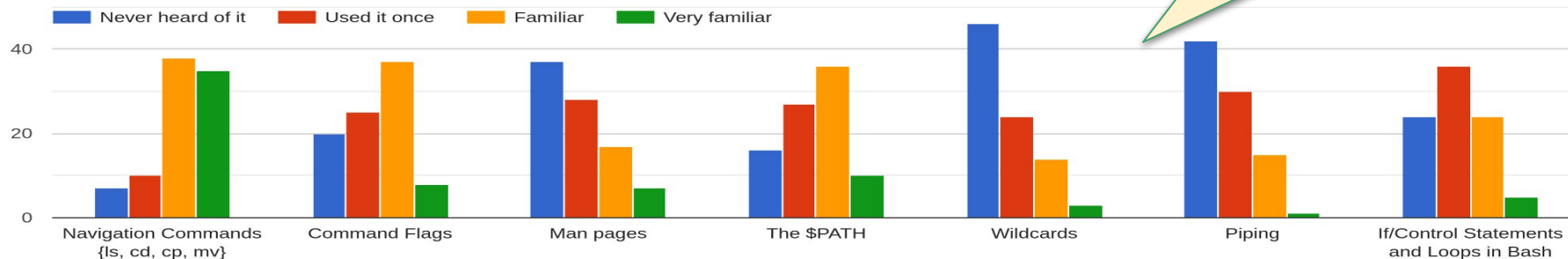
Have you taken a Unix/Shell class in the past? (E.g at your university or another tutorial)

90 responses



Pre-training Survey

How comfortable are you with the following topics in the Shell/Bash?



Checklist - Before the Training

Indico agenda

- ☐ Include links to surveys in the side menu bar (can be done with manage > layout > menu). Set visibility to "only participants".
- ☐ Include note to participants that some links only become visible if they have logged in to indico
- ☐ Add 30 minute session "Join here if your setup is not working" before the introduction session
- ☐ Include a code of conduct tab
- ☐ Create pre-workshop survey and set it to accept submission
- ☐ **Registration**
 - ☐ Make sure that people can hide their name from the participant list
 - ☐ Add:
 - ☐ checkbox "I have read and accept the code of conduct"
 - ☐ Checkbox "I know that the sessions will be recorded"
 - ☐ Checkbox: "I accept the terms and conditions for obtaining certificate" (if we have conditions there)
 - ☐ Checkbox: "I will fill out the post-workshop survey even if I do not attend the event"
 - ☐ Make sure that these boxes are required to be checked
 - ☐ Consider not to use a deadline for the registration. Instead do "Please register before XX. If you register after XX, please also write us an email so that we can forward you relevant pre-workshop emails."
- ☐ Make sure that timetable is published: If you go to "manage" and then "Timetable", you see a yellow bar warning you if it isn't already published
- ☐ Make sure that link to carpentries workshop website is updated
- ☐ Make sure that list of educators is updated
- ☐ Setup instructions:
 - ☐ If there are data files to download, make that part of the setup instructions to not lose time during the workshop

HSF/IRIS-HEP Software Basics Training (Virtual)

HSF/IRIS-HEP Software Basics Training (Virtual)

20–21 May 2024
Europe/Zurich timezone

Enter your search term

Overview

Code of Conduct (Read)

Timetable

Registration

Participant List

Videoconference

Past training events

Pre-requisites

Contact us

✉ hsf-training-may24-orga...



We are very excited to announce a workshop on software basics in HEP organised through the [HEP Software Foundation](#) and [IRIS-HEP](#) together with [Software carpentry](#).

The times for the workshop are in US Eastern time zone.

Over two days we will cover the fundamentals of:

Unix (e.g. shell, bash and scripting)
<https://swcarpentry.github.io/shell-novice/>

Git and Github – how to version control your code
<https://mambelli.github.io/git-novice/> (extended version of <https://swcarpentry.github.io/git-novice/>)

Python – fundamentals of using the Python language
<https://swcarpentry.github.io/python-novice-inflammation/>
<http://swcarpentry.github.io/python-novice-gapminder/>

HSF/IRIS-HEP Python for Analysis Training (Virtual)

HSF/IRIS-HEP Python for Analysis Training (Virtual)

5 June 2024
Europe/Zurich timezone

Enter your search term

Overview

Code of Conduct (Read)

Timetable

Participant List

Videoconference

Past training events

Pre-requisites

HSF pre-survey

Contact us

✉ hsf-training-py4an-jun24...



We are very excited to announce a workshop on Python for Analysis in HEP organised through the [HEP Software Foundation](#) and [IRIS-HEP](#).

The times for the workshop are in US Eastern time zone.

We will cover the fundamentals of:

Python for analysis – how to analyze data in Python either with PyROOT or with the tools from Scikit-HEP

Checklist - Before the Training

Announcement

- ☐ Draft Announcement email
- ☐ Make sure to also advertise the training center in the email

Pre-workshop emails

- ☐ Make #general channel on slack admin-only and add pinned messages pointing people to the right channel: "Hi all! If you're joining for the software basics workshop, please join #swc-jun25 (and that's also the best place to say hi to or post your questions). For the time being, I've made posting in #general admins-only. "
- ☐ "Welcome to the software basics training! You can find the link to the indico and the zoom connection in the top bar. To keep an overview in this chat, please use the "Reply in thread" button when following up with questions. "
- ☐ Send first email to students:
 - ☐ Include slack invite
 - ☐ Make sure to remind everyone to do the setup BEFORE the workshop
 - ☐ Send reminder: Join 20 minutes earlier if you have trouble with the setup
 - ☐ Copy email to google drive for reference
 - ☐ Remind people that in order to get a certificate, they need to document their work
 - ☐ Include Zoom link
 - ☐ Remind people to download python dataset
- ☐ If educators are not registered to Indico, make sure to send them the Zoom link

Checklist - Before the Training

Prepare post-workshop survey

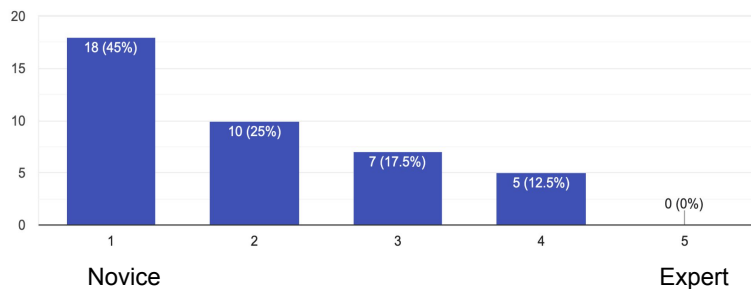
- ☐ Include a link to our recruitment form
- ☐ Include question about why people dropped out
- ☐ Add separate survey with simple questions (including email) to qualify for certificates (rather than our usual "send us proof of work")



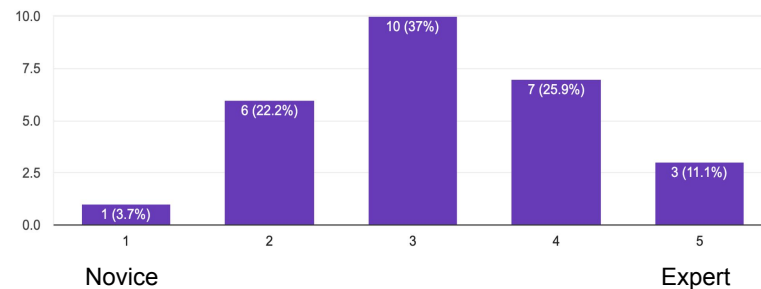
Post-Surveys

- Combined, pre and post-surveys help to define SMART* goals
 - Pre-survey: Demographics, How much do you know?
 - Post-survey: How much do you know **now**? What can we do better next time?
- We also do our best collecting information of people dropping the event
- A link is provided if a student is interested in becoming a mentor

How confident are you in your knowledge and abilities when using Git?
40 responses



How confident are you in your knowledge and abilities when using Git after the workshop?
27 responses



*Specific, Measurable, Achievable, Relevant, and Time-bound

Checklist - During the Training

During the workshop

- ☐ Remind people that in order to get a certificate, they need to document their work
- ☐ Have some mentors join 30 minutes early to help people who's setup isn't working
- ☐ Zoom: Make sure all instructors have the numeric password to make themselves host
- ☐ **Take a group picture!** Ideally, right after the introduction, where we have most people
 - ☐ Make sure that everyone knows that this picture will be used and published to the web
 - ☐ Put the group picture into our google drive folder for later use
- ☐ Last day: Set the post-workshop survey to accept answers
 - ☐ Include specific questions: Maybe we tried something new and want to know if it worked? Maybe one speaker used a split screen and the other didn't etc.

Checklist - During the Training

Constant

- Don't forget to restart **recording** after break!
 - Best to record in several chunks rather than using the "pause" button, because else the files become really hard to handle when downloading them
- Use a screen-saver to remind ourselves :)
- Frequently ask to use the thumbs up/go slower/go faster reactions
- Make sure that participants use the thumbs-up reactions if they are being asked if they are doing well (much nicer for the speaker)
- After break in multi-session block: Ask if people feel lost/bored/happy using Slido or zoom poll
- Add 10 minute "time for question/exercises" before every break (so that students and educators can take their breaks in peace)
- Zoom: Make sure to always make instructors co-host

Checklist - After the Training

After the workshop 🖐️

- ☐ Send reminders about post-workshop survey
- ☐ Upload recorded sessions to youtube or indico
 - ☐ If possible, include a link to recordings in the material pages for self-study students.
- ☐ Organize a post-mortem event after the survey results are in
 - ☐ Make sure to update the post-mortem document in the drive
- ☐ Stitch together group picture
- ☐ Make sure you have added/updated all educators' profiles for [our community page](#)
- ☐ Count the number of students and add the number to google sheet
- ☐ Hand out certificates upon request
- ☐ Propagate relevant changes to this workshop-specific checklist back to the [Workshop checklist](#)
 - ☐ Also include anything relevant from the post-mortem session

What does the event look like when we gather?



- Organizing the event carefully is very important to ensure that it is effective
- The general motif to keep in mind is that you want to make sure that everyone attending can digest the material as easily as possible and get personalized attention when necessary
- How this happens is different for in person and virtual events

What does the event look like when we gather?



In Person Event

- Room
- Technical setup
- External connection

Virtual Event

- Recorded lessons
- Record the event
- Host the event on Zoom
- Small group sessions
- Be wary of timezones

Debrief - Post-mortem



- Following the event, find a time to gather with the educators to have a time to discuss and debrief about what was successful and what was not
- This can be done after you have the results of the post-(and pre-) workshop surveys to help give some focus to the discussion. This feedback should be documented on your post-mortem document.

Summary

- Organizing the event carefully is very important to ensure that it is effective. Keep always in mind that you want to make sure that everyone attending can digest the material as easily as possible and get personalized attention when necessary, independently of the type of event you have planned
- If you have organized a workshop/conference yourself, some of these tips may already be intuitive to you. Likewise, some of it may not. If you have an alternative approach, we are eager to learn from your experience