



Planning of trainings / events: Face-to-face or virtual setting? Checklist for choosing the appropriate setting and information about virtual learning formats

Introduction

Since March 2020, virtual learning formats have been extensively tested. The experiences now range from short information events to two-day workshop formats. Trainers have quickly embraced this form of learning. The level of professionalism and quality of virtual learning formats has increased exponentially. All forms of virtual learning are called e-learning¹.

We would like to share our learning experiences with this short handbook. Virtual trainings and events save resources. They reduce the personnel and financial costs of participation. Business trips are avoided and trainers from all over the world can be hired to conduct a training. On the other hand, sometimes the personal meeting in a group can be decisive for a learning goal.

There are three main types of trainings and events:

1. Face-to-face event
2. Face-to-face event with virtual parts (also called Blended Learning²)
3. Virtual event

Goals of the checklist:

- Orientation: Which format is the right one for the objectives of the training?
- Focusing: How can I combine learning formats?
- Raising awareness: When is a virtual format a good option?
- Inform: How do we define learning settings and formats?

Recommendations and explanations of learning formats

In this document you will not only find the checklist but also a presentation of different learning formats. You can compare the parameters you selected in the checklist with the recommended criteria for the different learning formats. This way you can identify which learning format seems to be most appropriate.

We would be happy to receive your feedback on whether the checklist and short handbook could support you in planning your training / event.

If you need any advice, please do not hesitate to contact us.

HR Development (V-PE)

<https://pe.desy.de/>

Sustainability (D6)

<https://nachhaltigkeit.desy.de/>

¹ **E-Learning** (= Electronic Learning) is a collective term for all formats of learning supported by electronic and digital media - both in the presentation, preparation and distribution of learning content. It can take place on the computer, laptop, tablet or smartphone.

² **Blended Learning** combines e-learning with face-to-face learning. The different methods alternate and complement each other. This makes learning more flexible and more independent of time and place.



Checklist for planning events

What is the aim of the event?

■ Presentation	Inform others / share content	<input type="checkbox"/> Yes <input type="checkbox"/> No
■ Interaction	Exchange: jointly develop / reflect on topics	<input type="checkbox"/> Yes <input type="checkbox"/> No
■ Training	Professionalize behavior, learn / apply new things	<input type="checkbox"/> Yes <input type="checkbox"/> No
■ Networking	Exchange expertise, share knowledge	<input type="checkbox"/> Yes <input type="checkbox"/> No

General framework

Number of participants	<input type="checkbox"/> less than 10 <input type="checkbox"/> 10-20 <input type="checkbox"/> 20-50 <input type="checkbox"/> more than 50
Target group	<input type="checkbox"/> all DESYans / all employees <input type="checkbox"/> leaders <input type="checkbox"/> employees from a/my department / group <input type="checkbox"/> employees from several departments / groups <input type="checkbox"/> mixed functions / professions <input type="checkbox"/> external persons (e.g. other experts on my topic)
Planned time scope	<input type="checkbox"/> up to two hours <input type="checkbox"/> half-day <input type="checkbox"/> all-day <input type="checkbox"/> several days
Venue and travel	<input type="checkbox"/> all participants are on site <input type="checkbox"/> some or all participants would have to request a business trip <input type="checkbox"/> air travel would be necessary
Frequency of events	<input type="checkbox"/> one-time event <input type="checkbox"/> Series of events (several, identical or consecutive events required) <input type="checkbox"/> recurring event (part of a regular [e.g. annual] event)
Face-to-face parts of the event	<input type="checkbox"/> absolutely necessary = face-to-face event Example: Learning practical skills for technical equipment or machines (e.g. forklift training) <input type="checkbox"/> beneficial = face-to-face event with virtual parts Example: personal networking / getting to know each other <input type="checkbox"/> not necessary = virtual event
Technical expertise in virtual formats	Is my own technical expertise sufficient? <input type="checkbox"/> Yes <input type="checkbox"/> No Can tasks be shared within a team? <input type="checkbox"/> Yes <input type="checkbox"/> No Is additional, external support needed? <input type="checkbox"/> Yes <input type="checkbox"/> No

Virtual learning and learning formats at DESY

Once you have determined with the help of the checklist that virtual settings are an option for you, the next step is to select a virtual learning format and plan its implementation. From here on, only entirely or partially virtual learning formats will be considered and explained.

The following three learning formats are already successfully used at DESY:

Virtual learning formats			
	Webinar / virtual event	Web Based Training (WBT)	Learning Nuggets
Definition	Live Online Training, or event with trainer or moderator	Interactive online training in self-study format	Short learning sequences (5-10 minutes)
Settings	<ul style="list-style-type: none"> Lecture, information event, seminar, workshop, moderated exchange etc. Participants can exchange information via chat, webcam, microphone Integration of further interactive tools possible: e.g. a virtual whiteboard, surveys 	<ul style="list-style-type: none"> Mostly smaller learning units, e.g. with short videos, animated presentations, short texts, quizzes and/or exercises Content can be worked on at your own pace, independent of time and location 	<ul style="list-style-type: none"> e.g. explanatory videos, training videos, E-Lecture, Quiz, small tasks, games app can be worked on flexibly at any time can be used e.g. as preparation or follow-up for (virtual) seminars
Application at DESY - Examples	<ul style="list-style-type: none"> virtual staff meeting 2020 language courses (EDU) Trainings on specific topics (V-PE) Exercise Break (BGM) 	<ul style="list-style-type: none"> radiation protection, safety instruction DACHS training training for the prevention of sexual harassment MKS safety training 	<ul style="list-style-type: none"> Particle Zoo Videos Editor training of the library Virtual tour PETRA III, Flash
Blended Learning	All three learning formats can be combined in a blended learning concept. Example: <ul style="list-style-type: none"> Use of a WBT to make sure that participants have the same level of knowledge before a face-to-face event. Afterwards, the participants work on further contents via WBT's / Learning Nuggets and meet regularly for exchange in webinars. 		

On the following pages, the three learning formats are explained in more detail and their content is combined with the checklist. Furthermore, you will find helpful tips and links to websites with virtual tools and services at DESY that can support you.

If you would like **advice or need tips on who can support you** in planning your learning format (including technical support), please contact:

HR Development: personalentwicklung@desy.de / <https://pe.desy.de/> or
 the IT-Meeting Service: meeting.service@desy.de / [Meeting Service](#)

Webinar / Virtual event

If the following criteria of the checklist are met, a webinar / virtual event is an option:

Goals	<ul style="list-style-type: none"> Useful for all four goals
Number of participants	<ul style="list-style-type: none"> Basically suitable for all group sizes Depending on own expertise and event concept Important: good pre-planning and professional execution
Target group	<ul style="list-style-type: none"> Generally works for all target groups The larger the group, the more important teamwork in interactive work sessions and good pre-planning are
Planned time scope	<ul style="list-style-type: none"> Can be adapted for all time formats Recommended maximum duration: two days
Venue and travel	<ul style="list-style-type: none"> Event location loses relevance Business trips / flights are avoided
Frequency of events	<ul style="list-style-type: none"> Can be planned to fit all kind of frequencies
Face-to-face parts of the event	<ul style="list-style-type: none"> Not required
Technical expertise in virtual formats	<ul style="list-style-type: none"> Is available or is purchased from trainers Is necessary with regard to content, design of the virtual format and technical processes

Practical experience shows the following works best:

- 1.5-hour work sessions within a seminar with longer breaks in between,
- no more than four work sessions in one day
- for longer formats, integrate multiple interactive work sessions

Tools to organize and conduct virtual seminars:

- Software: [software currently used at DESY](#)
- Indico (information, registration, etc.): <https://indico.desy.de>
- ISS: <https://iss.desy.de>

Clarify for yourself how you want to involve the participants:

- Questions should be allowed (in virtual setting)
- Written participation via the chat
- Participants should be able to actively participate by speaking up
- Participants should actively discuss in small groups (breakout rooms)
- Integration of surveys (e.g. Zoom, mentimeter)
- Screensharing: Expertise / Results from working groups are shared
- Integrate feedback into events (e.g. voting, cameras)

To summarize:

- Virtual seminars have been successfully tested as a new training option.
- If attendance is not required, a virtual event can be the appropriate format for many settings.
- Business trips and flights are avoided.
- External expertise can be virtually integrated from all over the world (while respecting time zones).
- Interaction between the participants is virtually possible in many ways.
- The quality of documentation of work results from breakout sessions is high and they can be reused later.
- Especially for shorter webinars / workshops virtual formats can save participants' time.
- A virtual event depends on good preparation and appropriate tools.
- Plan events as a team to reduce your own workload and divide tasks regarding technology and moderation / teaching.
- External trainers often work in a team and bring technical support.

Web Based Training (WBT)

If the following criteria of the checklist are met, a WBT is an option:

Goals	<ul style="list-style-type: none"> ■ Presentation ■ Training
Number of participants	<ul style="list-style-type: none"> ■ Can be used by individuals or specific target groups, the number of users is not limited ■ Only makes sense if a larger number of users is targeted
Target group	<ul style="list-style-type: none"> ■ Generally works for all target groups
Planned time scope	<ul style="list-style-type: none"> ■ More suitable for shorter formats
Venue and travel	<ul style="list-style-type: none"> ■ Event location loses relevance ■ Business trips / flights are avoided
Frequency of events	<ul style="list-style-type: none"> ■ Can also be used in the context of blended learning for all kinds of events
Face-to-face parts of the event	<ul style="list-style-type: none"> ■ Not required
Technical expertise in virtual formats	<ul style="list-style-type: none"> ■ Is available or is purchased via external sources ■ Expertise in content, design and technology required only once

WBTs at DESY

More information about the WBT at DESY can be found under the following link:

https://wbt.desy.de/index_ger.html

ILIAS (Learning Management System at DESY)

<https://training.desy.de/>

ASIP (is used by MKS)

<https://mks-asip.desy.de/aoc/view>

To summarize:

- WBTs are currently used at DESY to impart standardized knowledge.
- WBTs are always suitable when knowledge is to be made accessible to a large audience.
- Advantage: The knowledge is accessible at any time and can be worked on at one's own learning pace.
- The preparation and organization of face-to-face training courses is no longer necessary. Content and technology only need to be designed once.
- If topics need to be updated frequently, the maintenance and cost effort of WBTs increases. This should be taken into consideration beforehand.

Learning Nuggets

If the following criteria of the checklist are met, a learning nugget is an option:

Goals	<ul style="list-style-type: none"> ■ Presentation ■ Training
Number of participants	<ul style="list-style-type: none"> ■ Can be used by individuals or specific target groups, the number of users is not limited ■ Only makes sense if a larger number of users is targeted
Target group	<ul style="list-style-type: none"> ■ Generally works for all target groups
Planned time scope	<ul style="list-style-type: none"> ■ More suitable for shorter formats
Venue and travel	<ul style="list-style-type: none"> ■ Event location loses relevance ■ Business trips / flights are avoided
Frequency of events	<ul style="list-style-type: none"> ■ Can also be used in the context of blended learning for all kinds of events
Face-to-face parts of the event	<ul style="list-style-type: none"> ■ Not required
Technical expertise in virtual formats	<ul style="list-style-type: none"> ■ Is available or is purchased via external sources ■ Expertise in content, design and technology required only once

Learning Nuggets at DESY

Particle Zoo:

<https://teilchenzoo.desy.de/videos/>

Explanatory video on the topic: BEM talks

<https://www.youtube.com/watch?v=EPxXgZC5yzo>.

Editors Training of the library

<https://bib-pubdb1.desy.de/record/321615/files/>

Flash:

<https://www.youtube.com/watch?v=qvVqAe29AZ4>

Virtual tour of PETRA III:

https://winweb.desy.de/pr/Virtueller_Rundgang/desy/index_de.html#node19

To summarize:

- Learning Nuggets are used at DESY to convey standardized knowledge in an entertaining way.
- They may also be an option with regard to external learning groups (e.g. pupils or students) to explain scientific contents in a comprehensible and clear way.
- Could be used more in the future for the introduction of new topics as well as for the visual explanation of work processes.