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HOW TO ORGANISE AN ADVANCED BLENDED COURSE ON TAXONOMY





Target group

Early-stage researchers and university students (B.Sc., M.Sc., and Ph.D. levels) representing the next generation of taxonomists.



Goal

To increase the taxonomy workforce and build capacity in Taxonomy, by continuously developing the **competencies** and skills of the taxonomic community. This includes **fostering innovative** methods and digital solutions to improve taxonomic **knowledge**, support integrative taxonomy, accelerate species discovery and description, and make collections and data more widely **accessible**.



Summary/Description

The community of facilities, collections, and experts within the **Consortium of European Taxonomic Facilities (CETAF)** envisions that the taxonomic knowledge and expertise needed to study, protect, and manage Europe's biological and geological **diversity** are openly and easily accessible, sustained over time, and integrated into decision-making processes.

The training course is based on the **Train the Trainers (TTT)** methodology (Figure 1) and employs a blended learning approach that combines online and in-person components. Trainees are trained by experts to become **Future Local Trainers (FLT)**s, who then act as multipliers by organising their own courses (Figure 1). Hosting these courses through the CETAF-DEST (<https://cetaf.org/dest/>) infrastructure ensures the sustainability of the training, and this is actively encouraged.

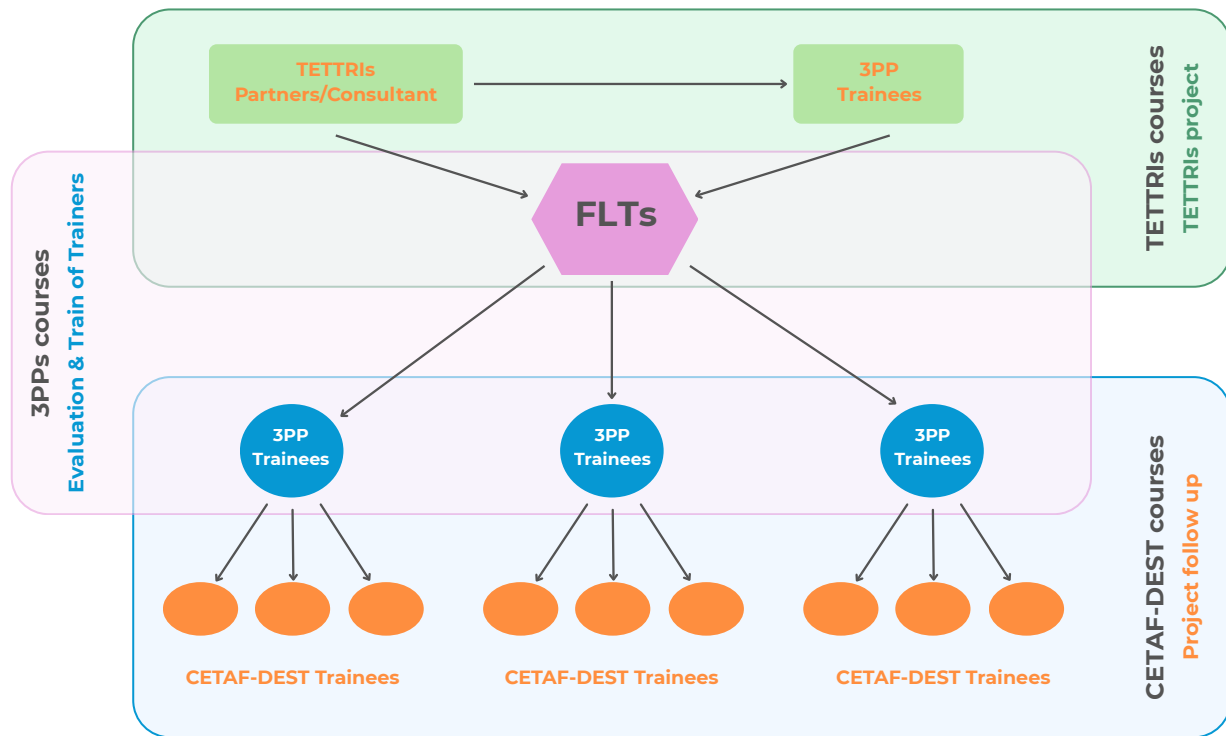


SOLMATS course | Photo by Iasmi Stathi



SOLMATS course | Photo by Iasmi Stathi

Figure 1:



The Train the Trainers (TTT) model for the capacity building in taxonomy through the TETTRIs project: a) The TETTRIs partners and consultants train the third party projects (3PPs) trainers on how to implement the TETTRIs courses on taxonomy. Then both train the Future Local Trainers (FLT) (green box). b) The FLT add learning material to the TETTRIs courses, developing the 3PPs courses, which they then teach to the 3PPs' trainees. c) The 3PPs trainees become the trainers of the courses delivered through the CETAF-DEST infrastructure, after the TETTRIs project's lifespan, as follow-up activities (blue box).



You Will Need

- **Expert taxonomists-trainers**, many of whom can be found in the CETAF community (<https://cetaf.org>).
- **A Learning Management System (LMS)** for asynchronous learning, where all the theoretical knowledge will be uploaded. The TETTRIs e-learn platform will be integrated into CETAF-DEST, after the end of the project.
- **A tool for synchronous distance learning**, e.g. Zoom, Teams, Webex, etc.
- **Laboratory infrastructure** for the in-person components, including stereomicroscopes, microscopes, lab consumables, projectors, molecular analysis tools etc.
- **An appropriate natural area** for the field part(s) of the course.
- **Transportation** for the field part(s) of the course.
- **Optional items:** food supply, accommodation, and a consent form for the use of photos and videos.





Steps to implement the Course

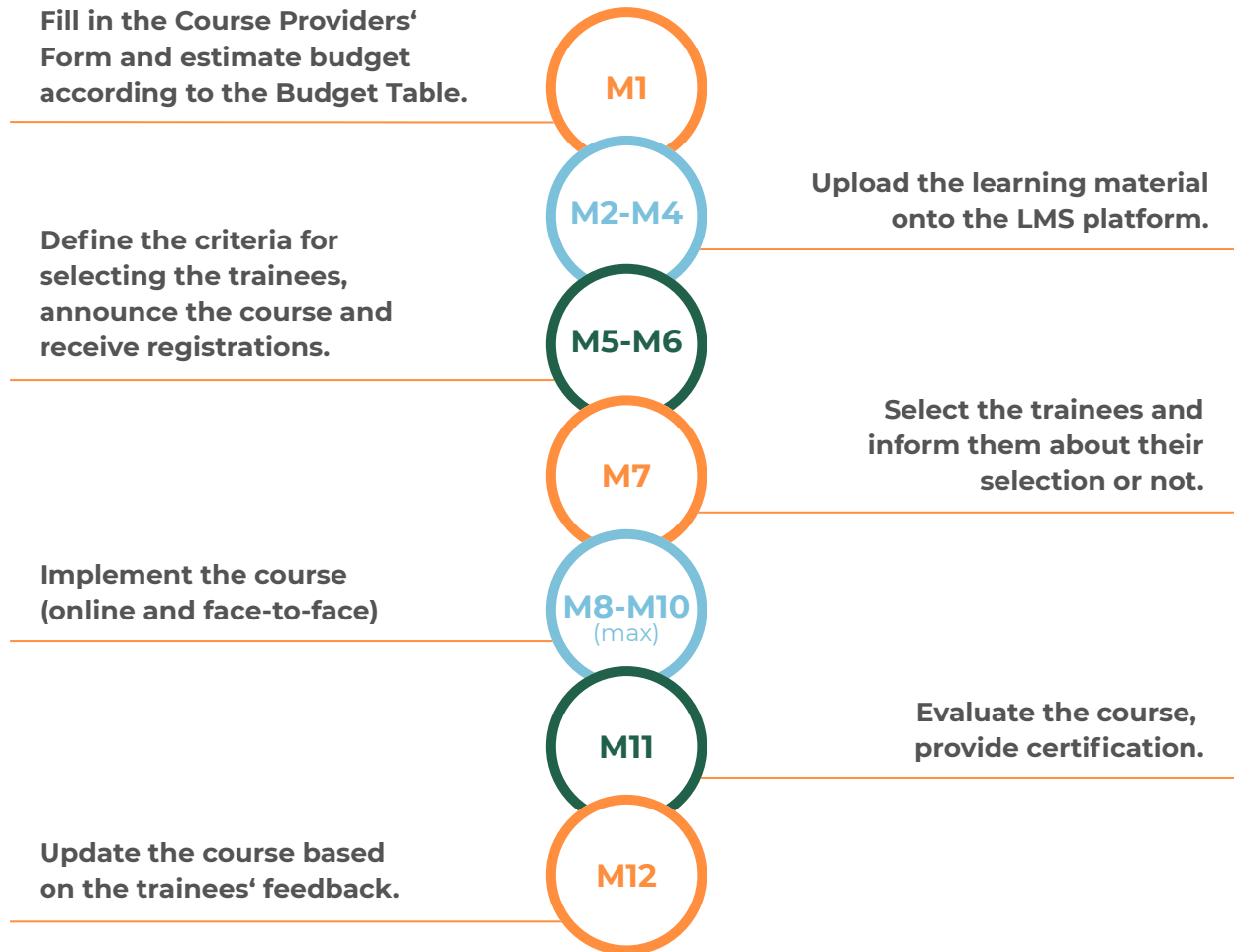
- 1** **Fill in the Course Providers' Form** (see Annex, 1).
- 2** **Estimate the budget** using the Budget Table (see Annex, 2).
 - The budget may vary depending on the host country, required infrastructure, transportation to the field, laboratory facilities, accommodation, food, etc.
 - Cost can range from a few hundred to several thousand Euros per participant.
 - Example: the SoilMATs course has cost approximately EUR 5 000 per participant, covering all expenses for 15 days in-person training across three countries (transportation, learning materials, field trips, lab infrastructure, accommodation, and three meals per day).
- 3** **Upload the learning materials** on the Learning Management System platform. For the TETTRIs e-learn platform, follow the Quick Start Guide for Teachers (see Annex 3).
- 4** **Define trainee selection criteria** according to diversity, gender, and inclusivity guidelines. (see Annex 4).
- 5** **Announce the course** and upload relevant information, preferably on the [CETAF-DEST](#) website.
- 6** **Receive registrations**, ensuring compliance with your institutions Ethics' Rules (sex and gender equality, inclusiveness, etc) (see Annex 4).
- 7** **Select the trainees** based on the defined criteria.
- 8** **Inform the applicants** about their selection, or non-selection.
- 9** **The trainers and the trainees complete the Consent Form for Photos and Videos** (see Annex 5).
- 10** **Implement the course** both online and in-person.
- 11** **Send the evaluation form** to the trainees **and the course report** to the trainers for completion.
- 12** **Distribute the certificates** to all trainees.





Timeframe

The timeframe is 10 to 12 months, depending on the curriculum of the course. An example of the timeframe could be as follows:





Complementary information: Related TETTRIs deliverables and additional resources

- ANNEX: Forms and tables to be filled in
- Prior Informed Consent Form (PICF)

1. The course providers' form

TETTRIs COURSE PROVIDERS' FORM

Training Course details	
Title	
Description	
Trainers' details (names, affiliation, short CV)	
Duration (number of days and total hours)	
Dates of Training period(s)	
Location	
Course's language	
Target audience	
Mode of trainees' assessment (test, group work, project)	
Participant quota (min and max number of trainees)	
Number of waivers/scholarships	
External funding/sponsoring (explain what is included)	
The training course will be managed and advertised by DEST	
The training course will be only advertised in DEST website	
Fee (explain what is included)	

TETTRIs EVALUATION FORM: TRAINERS

Please fill in the Trainers' evaluation report

Title of the course	
Dates of Training period	
Location	
Contact person	
Institution/Organisation	
Final number of trainees	
Final number of trainers	
Describe any deviations between the plan and the execution during the course implementation:	
Recommend suggestions for improvement for a next iteration of this course:	
Any other comments/suggestions:	

2. Estimated Budget (Indicative)

TETTRIs BUDGET TABLE

TRAINING COURSE MAIN BUDGET CATEGORIES		COST in euros (including taxes)				Total	notes
		Trainer 1	Trainer 2	Trainer 3	Trainer 4		
Reimbursement of trainers outside the host institution	preparation of the course (structure and teaching material)						
	delivery of teaching and daily allowance						
	travel						
Reimbursement of trainers of the host institution	accommodation						
	preparation of the course (structure and teaching material)						
	delivery of teaching						
accommodation							
Administration/Organisation of the course							
Overhead (possible administration and financial cost of the hosting institution)							
Teaching materials (flash disks, hard copies, etc)							
Venue rental	rental of rooms						
	renting of supporting technical and digital facilities						
	human resources (outside the trainers) needed to support the implementation of the course						
	Transportation for trainees (in case of field trip, e.g. bus, train, cars)						
Coffe breaks, lunch, dinner							
DEST fee (50 euros/trainee)							
TOTAL BUDGET							
TOTAL BUDGET divided with the average number of participants (the course fee)							



3. TETTRiS e-learn platform: Quick start guide for teachers

The detailed information for this section can be found via the QR code on the front page of the recipe, which links to the digital version.

4. Ethics' rules (sex and gender equality, inclusiveness, etc)

[TETTRiS-Gender-Grid - Google Docs](#)

Gender & Diversity Grid		
The integration of the gender & diversity dimension into research and innovation content has become a requirement by default across the Horizon Europe programme. TETTRiS project pays particularly attention to ensuring gender balance in the composition of the beneficiaries of the calls consortium and among the participants to the project activities. The Gender and Diversity grid has been prepared to help you meet EU requirements on this topic in your project. You will find questions to be answered before the project start and two questions to address at the end of the project. For more information on the Gender dimension context in the European Research Area and research projects see https://research-and-innovation.ec.europa.eu/strategy/strategy-2020-2024/democracy-and-rights/gender-equality-research-and-innovation_en		
Project leader name and surname		
Project title		
Contact person email		
Question to address	Yes/No/Partially/NA	Comments
Is the selection of participants open to any gender or origin?		
Before starting the selection of participants, did you consider the possibility of a gender gap in the number of participants?		
Are the training & meeting times appropriate for participants with family commitments?		
Have possible barriers to gender equality been taken into account in the design of the training/project activities?		
Does the project ensure that participants with any gender identity and from any origin can provide inputs, access, and participate in project activities?		
Are the practical and strategic needs of gender adequately addressed in the equipment and materials used for the project?		
Are sex-disaggregated data and/or gender equality performance indicators used (where possible) throughout the project?		
Are the language and images used during the training gender sensitive?		
Do the project activities include a gender-sensitive approach, especially with regard to information, documentation and results?		
Is gender expertise required from the trainers and other resource persons?		
Did the objective of promoting gender and diversity equality influence the activities and outcomes of the project?		
If a gender gap was present among the project consortium and participants, did you adjust your criteria and methods to reduce it?		

5. Evaluation of the course by the trainees

After the end of the course the trainees fill in the evaluation form [here](#).

EVALUATION FORM: TRAINEES

Dear Trainee,
We would greatly appreciate your feedback concerning the Training Course you followed. Your answers are anonymous and will serve to improve future Training Courses. Thank you for your collaboration!

CONTENT METHODOLOGY AND ORGANIZATION STATEMENTS

1. The Training Course educational material/resources helped you understand the subject matter
Strongly Agree Agree Disagree Strongly Disagree

2. The work required of you was appropriate based on the Training Course objectives
Strongly Agree Agree Disagree Strongly Disagree

3. The Training Course stimulated your interest in the subject matter and encouraged you to think critically
Strongly Agree Agree Disagree Strongly Disagree

4. The Training Course was well organized in terms of its daily program
Strongly Agree Agree Disagree Strongly Disagree

5. The Training Course was well organized in terms of its infrastructure
Strongly Agree Agree Disagree Strongly Disagree

SUMMARY STATEMENTS

1. Overall rating of the level that your original personal expectations about the Training course, were covered
Excellent Good Satisfactory Poor

2. Overall rating of knowledge, skills and competences gained from the Training Course related to your personal expectations
Excellent Good Satisfactory Poor

3. Overall rating of the Training Course
Excellent Good Satisfactory Poor

4. Would you recommend this Training Course to others?
Yes No Maybe

FREE RESPONSE QUESTIONS

1. What did you like about the Training Course and/or the instructor? Please give examples

2. What aspects of the Training Course and/or the instructor could be improved? Please explain

3. What aspects of the instructor's methods could be improved? Please give examples

4. Please list additional comments and/or suggestions

TRAINEE INFORMATION

1. Gender
Male Female Other

2. Age
20-30 30-40 40-50 50-60 60-70

3. Position
Graduate student MSc student PhD student Postdoc Staff
Other

4. If you are a staff member or affiliated in your institution, please mark your position
Director Manager Researcher Curator Technician Officer Free Lancer
Other

5. Degree of Expertise
Secondary School Technological Degree University MSc PhD

6. Scientific Diploma background
General Biology Botany and Agriculture Zoology Earth Sciences (Geology, Paleontology, etc.)
Other

7. How would you rate communication with the course provider?
Excellent Good Satisfactory Poor



6. Consent Form for the use of Photos and Videos



TETTRIs

CONSENT FORM FOR TAKING PHOTOS/VIDEOS

Full name:

To take photos/videos for:

A. posts on the websites of the (*institute giving the course*)

....., on the respective social media (such as Facebook, Instagram, etc.), on news sites or television stations, with the aim of promoting and informing the educational community and the public about the activities of the course.

- Yes, I give my consent
 No I do not give my consent

(fill in accordingly)

B. ... to be included in printed materials (information material, posters, souvenir albums, etc.) to promote and inform the educational community and the public about the activities of the course.

- Yes, I give my consent
 No I do not give my consent

(fill in accordingly)

Place and date,

.....

Signature

.....



7. Evaluation of the course by the trainers

After the end of the course, the trainers write a report of the course by filling in the table [here](#).



COURSE PROVIDERS' FORM

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The training course will be only advertised in DEST website	
Fee (explain what is included)	

8. Certification

Certificate should be provided according to the [European standards](#) for a quality education and training for all. An example is given [here](#).

Logos

CERTIFICATE OF ATTENDANCE

This is to certify that

.....

has completed successfully the Training Course

.....

provided by:

Online training (..... hours; from to)

Face-to-face Workshops (..... hours) in:

.....

Total Learning Effort: hours, equivalent to ECTS/ECVET credits

Trainer 1	Trainer 2
Title	Title.....

SOILMATS course, tardigrade | Photo by Edoardo Massa



A [Europass Certificate supplement](#) would also be important and useful. An example in English is [here](#).

Certificate supplement

<https://europass.europa.eu/en/document-library/certificate-supplement-example-united-kingdom>

1. Title of the certificate ¹

2. Translated title of the certificate ²

3. Profile of skills and competences

List the skills and competences acquired by the holder of the certificate. This list should start as follows: "A typical holder of the certificate is able to:" and should include a list of about 5 to 15 items using action verbs to describe skills and competences.

4. Range of occupations accessible to the holder of the certificate ³

5. Official basis of the certificate

Body awarding the certificate Authority providing accreditation / recognition of the certificate

Level of the certificate (national or European) ¹ Grading scale / Pass requirements

Access to next level of education / training ¹ International agreements on recognition of qualifications¹

Legal basis

6. Officially recognised ways of acquiring the certificate

Replace with a description of the way the certificate can be acquired (apprenticeship, school/training centre-based or workplace-based, accredited prior learning) and/or complete the table below.

Description of vocational education and training	Percentage of total programme (%)	Duration (hours/weeks/months/years)
School/training centre-based		
Workplace-based		
Accredited prior learning		
Total duration of the education / training leading to the certificate		

¹ In the original language. | ² If applicable. This translation has no legal status. | ³ If applicable.

The Certificate supplement provides additional information about the certificate and does not have any legal status in itself. Its format is based on the Decision (EU) 2018/646 of the European Parliament and of the Council of 18 April 2018 on a common framework for the provision of better services for skills and qualifications (Europass) and repealing Decision No 2241/2004/EC.

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7. Additional information

Entry requirements ¹

More information (including a description of the national qualifications system)

National Europass Centre







TETTRIS



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Catalogue of Life

