NIH Diversity Program Consortium

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PROCESS & PRODUCT

HOSTING A VIRTUAL RESEARCH SYMPOSIUM

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The Diversity Program Consortium is a national collaborative research project in which the National Institute of Health funds and works together with institutions to advance the overarching goal of developing, implementing, assessing and disseminating innovative, effective approaches to engage, train and mentor students, enhance faculty development, and strengthen institutional research and research training infrastructure.

The DPC is made up of three closely integrated initiatives: Building Infrastructure Leading to Diversity, National Research Mentoring Network, and Coordination and Evaluation Center. As one of these funded initiatives, the CEC is responsible for the longitudinal, consortium-wide evaluation of the training and mentoring interventions that other partners develop and put into practice.

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Executive Summary

The Diversity Program Consortium (DPC) is a network of institutions funded by the National Institutes of Health (NIH) to engage a more diverse field of individuals in biomedical research careers.[1] In response to the cancellations of in-person research conferences that impacted the consortium's undergraduate trainees, DPC collaborators joined to host a virtual research symposium and provide trainees with an opportunity to present their research.

This report outlines the process of hosting the event through the lens of project management's five phases: initiating, planning, executing, monitoring and controlling, and closing.[2,3] Similar projects can be designed using the information in this report, which is derived from the team's experiences. The accompanying toolkit[6] outlines the steps with tables, prompts and templates that can be tailored to the needs of other sites and programs.

Consortium-wide collaboration played a key role in designing this project. The team set goals for participation rates and engagement from across the consortium, which included having at least one trainee from each of the DPC Building Infrastructure Leading to Diversity (BUILD) sites participate, and inclusion of all trainees who wished to participate, as well as broad participation across the consortium. The virtual research symposium consisted of oral research presentations by 16 undergraduate trainees from 8 of 10 BUILD sites. Presentations fell across biological, physical, social, health sciences, engineering and computer sciences, and were moderated by NIH, NRMN, and CEC leaders. The virtual poster hall included 76 posters and 8 BUILD sites were represented. Digital engagement with the DPC website and DPC-associated social media accounts reached record highs. Audience members included trainees from across the consortium, along with their family and friends, staff, investigators, mentors, and faculty from across the BUILD sites.

The event embodied the DPC's efforts to engage a more diverse field of individuals in biomedical research by elevating and providing evidence of undergraduate student research, illustrating the process, importance and potential impact of research to audiences from multiple stakeholder groups.

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Introduction

The Diversity Program Consortium (DPC) is a national collaborative research project in which the National Institutes of Health (NIH) works together with institutions to engage a more diverse field of individuals in biomedical research careers through student training, faculty development, strengthening mentoring, and supporting institutional research and research training infrastructure. [1] One of the DPC initiatives is the Building Infrastructure Leading to Diversity (BUILD) program, in which ten research active institutions were awarded grants to develop and implement novel strategies at student, faculty and institutional levels of impact.[4] These grantees designed programs intended, in part, to transform their institutions' research training for undergraduate students and increase the number of those students completing biomedical degrees and moving into graduate programs. The Coordination and Evaluation Center (CEC), another DPC-funded initiative, is tasked with conducting a longitudinal evaluation to assess the innovative approaches across multiple sites, as well as disseminating and amplifying research findings from the DPC. The CEC's Communications and Dissemination Core (CDC) is primarily responsible for these dissemination and amplification efforts.[5]

Because every awardee has site-specific as well as consortium goals, collaboration is an integral part of the DPC, and the CDC interacts frequently with all DPC sites to disseminate findings and to share interim progress and consortium news. In early spring 2020, consortium members recognized that in-person conferences planned for spring and summer were being cancelled due to COVID-19-related restrictions, disrupting undergraduate trainees' planned research presentations. To provide trainees with an opportunity to share their research and to gain experience presenting, the CDC collaborated with a working group of consortium-wide communicators to outline a plan to host a virtual research symposium in which trainees could present research posters and oral presentations.

Using a lens of project management, this report describes the execution of the symposium. The overall process includes initiating, planning, executing, monitoring and controlling, and closing.[2,3] Because this process strategy is typically used and described in business or information technologies rather than academia, some description to the process components is included. Additionally, the virtual symposium represented not only the creation of a project but also the replacement of multiple in-person events with a virtual one, so aspects of this report describe the challenges of reinvention, and the need to separate a new event from an old one and the transition from in-person to virtual.

Initiating

The primary function of the initiating phase was to think through the big picture of the event. This 30,000-foot view helped set the stage for the details and served as an anchor for the purpose of the project. Further identifying supports and limitations helped in setting measurable and achievable goals. In business, this gathering of project specifications ensures the client is supplied with a workable product;[2,3] when translating these principles to the academy, this process sets the parameters of effort that assures a project was well defined, stays on track, fits the community, and meets the planned goals.

Purpose

Understanding purpose began with a simple question, "What is the point of the event?" For this project, the point was to plan an event for undergraduate trainees to present (talk or poster) their research.

Scope

For this group, the scope was clearly defined by the CDC's role and membership in an established group (DPC). The constituents for this event were the 300-400 current undergraduate trainees involved with the BUILD programs across 10 different institutions.

Risks

As this event was being offered as a substitute for multiple in-person events, there was the risk of the participants and attendees expecting more than could be delivered. The intention was not to directly replace an in-person event with a virtual event; rather, the team created a stand-alone virtual event because the in-person conferences were unable to meet. The virtual research symposium (VRS) was not intended to mirror those cancelled experiences.

The face-to-face meetings and the virtual meeting would be structured differently and have unique advantages and disadvantages. Setting clear goals for the virtual event and communicating those to participants helped to clarify expectations.

Gathering information from the participants about their priorities, concerns, and participation was key to shaping a virtual event that would meet their needs and minimize the risk of planning in error.

Capacity

In spring 2020, the DPC was in year 6 of a 10-year project and had multiple established working groups. The DPC Communications Working Group (CommsWG) consisted of members from across the consortium with expertise in communication. A Chair and Co-Chair lead a monthly meeting to discuss new and ongoing projects. All three members of the CDC regularly attended these meetings and worked in conjunction with the group's chairs to propose ways to collaborate with the group and offer leadership when needed.

At the April 2020 meeting, the group discussed the impact of COVID-19 on student attendance to conferences and decided to move forward with a virtual symposium during the last week of the month. Because the CommsWG members were embedded in the programs, this group provided direct knowledge of student needs, had established personal relationships with students and program personnel, and knowledge of routine communication. Design and implementation of the project would be led by the CDC and the CommsWG Chair, with support from other CommsWG members and individuals from the DPC on an ad hoc basis.

Executing the project included ensuring that team members had the skills and experience to implement the goals (e.g., the capacity). The CDC team consisted of three individuals with a broad range of administrative, media and website expertise. They also engaged the support of CEC administrative staff, and the CommsWG Chair, who brought additional media and administrative experience. The CDC Director assumed a collaborative leadership role, providing a central hub of direction and decisions across all groups. Having a team leader who delegated responsibilities helped ensure the project stayed on track and that tasks were allocated fairly.

Support/Limitations

Wide support and commitment across the consortium were key to the design and implementation of

this project, so, communication to leadership, students, and the general constituency was required. There were two primary limitations: time and technology. There were only 25 days between the decision to move forward with the project to the first planned event. The short timeline necessitated the use of available, familiar tools. Shifting from multiple in-person events for geographically distributed participants required technology.

Success Factors/Measurable Goals

Setting success factors or measurable goals was a challenging aspect of the initiating process because the team was developing a new project and had no prior metrics upon which to rely. The success measures were basic: undergraduate trainees who wanted to participate would be able to participate; and at least one trainee from each BUILD site would host a poster or give an oral presentation.

These metrics could be improved upon for future projects by setting measurable goals for website interactions, social media posts, numbers of attendees, number of trainees who followed through on registrations, and survey participation rates, among other possibilities. For this event, the primary goal was to provide trainees with the opportunity to present on their research, thus the success criteria matched the purpose and scope of the team's capacity within the limitations and supports identified. Counting the participation of any trainee who wanted to join matched the purpose for this event, and the goal of participation across the consortium responded to the scope of the event.

Planning

With the initiating phase completed, the team moved into the work of planning. Planning started with the "due" date, or the date of the event, and moved backward and assigned milestones. To determine dependencies, the team asked what must be done before moving to the next step; e.g., asking what task was dependent on completion of another task. Leadership, delegation and personal responsibility are essential in the planning phase. The team demonstrated personal responsibility by adopting standard communication strategies and exercising problem solving, flexibility, creativity, follow-through and open communication. Additional steps included identifying tools, common storage of documents, workflows, and technologies and established technology redundancy. An aspect of this project design that may seem unfamiliar to those accustomed to working with a business-oriented lens of project management was that tasks and responsibilities were assigned based on skills rather than hierarchy. The team worked together to define the skill sets of every team member and all potential collaborators. This report uses examples from the VRS planning stages as a case study to illustrate planning steps. These steps can be used as a model for a similar project, or an outline for another virtual research symposium.

Set major milestones

Setting major milestones guided the project implementation by helping the team focus their energies on the most important elements of the project design. For this project, the team had established major milestones within two days of initiating the project (4/2/2020).

Sample Table 1: Major Milestones

Date	Description
4/7/2020	Email to Principal Investigators (PIs) explaining event, providing communication to trainees and requesting PI selection of oral presenters
4/15/2020	Trainee registration for poster submission due Nomination of oral presenters due
4/17 adjusted to 4/20/2020	Trainee posters submitted
4/17/2020	Trainee Oral Presentation Registration Due
4/27/2020	Opening Session
4/28/2020	Poster Hall Opens
5/1/2020	Closing day of the symposium

Identify major activities, collaborations, tools, and lead

Working from the milestones, the team next identified major tasks that would need to be completed. Although a numbered list can be used to identify major tasks, it is recommended to create a table to outline the activities, person(s) responsible, tools and the activity lead. Collaborating with the CEC administrative staff helped the team track and organize these activities.

Sample Table 2: Activity mapping

Activity	Collaborators	Tools	Lead
Recruit student poster presenters	CDC, BUILD PIs, CommsWG, AC	Email, Google forms, Google Drive, Excel, Asana, Social Media	Visual Media Expert
Recruit student oral presenters	CDC, BUILD PIs, CommsWG	Email, Google forms, Google drive, Excel, Asana, Social Media	Visual Media Expert
Recruit moderators	NIH, CDC	Email	Visual Media Expert & Communication Prof
Create session schedule	CDC, NIH	Email, Google forms, Google drive, Microsoft Office	Visual Media Expert
Create website plan	CDC, AC	Microsoft Office, Canva, CMS, Asana	Project Manager & Technical Lead
Create technology plan	CDC	GoToMeeting, phone, Microsoft Office, Asana	Project Manager & Technical Lead
Create a program	NIH, CDC	Canva, Adobe	Communication Prof
Create communication plan	CDC	Mail Chimp, Canva, email, Asana, Google drive, Social Media	Project Manager

Dependencies & Timelines

Identifying dependencies improves efficiency as it anticipates what must happen before the project can move on. This team identified the following dependencies and altered plans accordingly.

1. Recruitment determined the number of trainees.
2. The number of trainees determined the number of sessions, moderators, and all technical needs.

3. All website pages needed to be designed to display the information received and we had to develop processes to organize and pass that information within the team,

4. Implementation of the website pages could not be completed until received information was organized and uploaded. (That process also required last minute changes to adapt to unforeseen challenges.)

5. As no lead time existed, the team had to adapt known technologies, whether they were ideal or well-suited to the tasks.

Determine roles and responsibilities

Responsibilities were divided based on who would lead aspects of the project, and project leadership evolved based on skills and connections across the consortium. Although the team members shared responsibilities across activities, they relied on the lead's expertise and direction. The Project Manager (PM) was responsible for overall management of the event, and assuring on time delivery and completion of all project aspects. The following outlines the roles and qualifications of the team:

Project Manager/Process Creation/Communication—(Project management, leadership position, administrative and communication background)

Visual media/Site Liaison/Oral Presentation—(Visual media expert, former site coordinator working with students, knowledge of research conference processes, and personal relationships with other site coordinators)

Website/Poster Hall/Technology—(Website construction experience, coder, technology-based visual elements, expertise in conferencing background)

Program/Moderators/Communication Partner—(Communication professional, NIH position, and expertise in professional conference events and visual communication)

Student Recruitment/Site-level Implementation—(Personal relationships with students and programs, knowledge of student-conference readiness, and knowledge of local site constraints)

Administrative Processes/Technology—(Skill in and access to the organization's tools, standing forms of communication, and availability as needed)

For this project, each part of the team was interdependent. Successfully managing a cross-functional team included recognizing a common goal and a willingness to communicate and troubleshoot.

Establishing a Communication Plan

The cohesive communication strategy considered the needs of stakeholders, the frequency of needed information, and all available communication tools. The chart below outlines the target groups, indicating the platform and frequency of engagement. The list begins with communication within the team, which is foundational to success across all constituencies.

Sample Table 3: Communication Plan

Stakeholder group	Frequency	Communication Tools
CDC team	Daily, By appointment	Email, Phone, Video Conference, Google drive, Asana, Canva
Within the organization	Standing meetings, Scheduled meetings (3-5 times a week)	Email, Video Conference, Google drive, Asana, Canva
Leadership	Planned during week 1 (direct, recruiting students), follow up based on questions, planned during week 3 (direct, promoting event)	Email, Flyer (Canva)
External collaborators	Standing meetings, weekly email campaigns (week 1 & 3 coordinated with leadership), coordinated social media posts (content provided)	Email, Phone, Video Conference, Google forms, Social Media, Flyer (Canva)
Student participants	Planned recruitment, planned follow up, ad hoc emails as needed	Social Media, Email, Google forms, Google drive
Moderators	Planned during week 1 (Direct, one time), planned follow up based on expressed interest and assignment	Email
Broad audience	Weekly email campaign (planned content, coordinated with website development, actionable)	Mail Chimp (monitored engagement)

A comprehensive communication plan extends beyond disseminating information to targeted audiences. The main goal of our communication strategy was not to deliver information to audiences, but to engage them in an interactive and participatory way. It was critical to build community awareness in a short amount of time as this was the first event of its kind in the DPC. Using a marketing approach to the VRS, the event itself was promoted like a product by utilizing digital mediums relative to the audience. This required developing a salient brand with strong visual design, clear brand identity, consistent messaging, effective mediums, and strategies to gain the trust of the community.

Strategies for brand success are below.

Visual design. A cohesive communication strategy includes development of a visual design for use across selected mediums. Visual design is not a separate element from information—design is information. An aesthetically pleasing and consistent visual design supports accessibility and retention of information. Strong visual design invites audiences to engage with the product by creating a comfortable 'space' to engage audiences. All designs were creating using Canva, an online design platform familiar to the consortium's communicators that had been used for previous projects. Because Canva allows customizable designs that can be shared and downloaded by a group and is available in free and paid

versions, it was a logical option for use by the consortium communications teams.

Brand identity. All communication regarding the symposium reflected consistent colors, fonts, graphic elements and logos (brand identity assets) so that community members would easily identify the event. These identity assets were previously established through the CEC and on the DPC website. A well-developed brand identity can help gain the trust of audiences, whom otherwise might not recognize the organization. To accommodate participants from a variety of institutions, each with a unique brand identity, a flexible and accessible visual design strategy that included options for customization was developed.

Messaging. The event's tagline, "Celebrating BUILD student research across the consortium," was visible in all communication. The event was also part of the CEC's larger "Stay Connected" campaign that began in response to the COVID-19 crisis to maintain the community's network while social distancing. By repeating the tagline and including the "Stay Connected" logo, the event's message was one of community togetherness and reassurance.

The medium is the message. As design is not separate from information; the medium chosen is not separate from the intended message. Communication must be contoured for each medium, such as the website, social media platforms, emails, and the event program (PDF). Two different audiences meant developing effective communication for two different mediums. Email was identified as the best medium to communicate with faculty, staff and leaders, as they use email regularly for employment and cross-consortium communication. Emails were written and designed to enhance communication, which included fliers and additional email templates (for program leaders to send to their communities). For undergraduate students, who are most likely 'Millennials' or 'Generation Z,' we identified social media as the best medium to reach this audience. For these audiences, social media is not a tool for communication—social media is a way to experience reality. Communications were contoured for Instagram, Twitter and Facebook, which require graphics of different sizes, specific ways to access links, and distinct 'tagging' features. Social media posts were used to recruit, update and publicize the event to participants, attendees, and other community stakeholders. Existing DPC social media accounts were used; it would not be recommended to create new social media accounts to publicize an event because it takes time to create an online presence, curate connections, and increase followers. The DPC communicators were familiar with social media from previous projects and campaigns, so were primed to disseminate and engage their students for a cross-consortium event. The communicators coordinated the posts so that all were releasing content on a shared schedule, ensuring the unity of messaging across social media platforms.

Curating a digital media presence for the VRS facilitated the engagement of participants and broadened the reach of the event. The symposium embodied the brand's tagline 'Stay Connected' by keeping participants connected across distance, discipline and the dissonance change can bring.

Executing

Because of the short timeline, planning for each week had to occur simultaneously with the execution of the current week's duties. It was imperative that the director maintained the project priorities. This required considering current progress, unexpected dependencies, and managing hard deadlines by making real-time adjustments to the tasks and work. The team met daily to try tools, discuss responsibilities, test out tasks, and make needed adjustments.

Required tools

The team used a variety of charts to map major activities and link them to the templates developed for the visual design.[6] Many of these documents were hosted on Google docs so they could be shared across the remote-working team, quickly viewed and edited. Descriptions share the teams' solutions to provide others with an example of solving logistics problems with commonly accessible tools.

We used Asana, a project management tool, to assign the specific tasks across the team. Because this project was planned and executed at virtually the same time, the Asana project outline represents both the plan and post-project edits (see VRS toolkit[6] for template).

Recruitment

Recruit student poster presenters: Google forms and Google sheets were used during student recruitment. The link to the form was shared in an email and the answers were collected in a Google sheet. The sheet was then modified to track processes and to assign poster numbers. We created an individual Google folder for each student, which included a link in the email communication to that the students could upload their poster and profile photo, if desired. An Excel document was also used to sort biographical and presentation information (discipline, specific research area, poster number, student last name, student first name). These planning documents were used to upload content into the web pages. It is imperative to maintain consistency across documents to ensure accuracy. Students' names, sites, and titles were sorted by discipline and alpha-order into the Google doc so they could be copied easily into web pages.

Sample Table 4: Recruiting student poster presenters

Toolkit Template/Section	Audience/Stakeholder	Purpose
Email Templates by Group	Principal Investigators (leadership)	To inform of and gather support for the virtual symposium; To request student participants; To outline deadlines
Email Templates by Group	Registered Student Participants	To communicate key information throughout the recruitment, participation and follow up (4 emails)
Google Forms Templates by Group	Potential Student participants	To register participants; To gather key information (discipline, talk title, etc.); To secure record of mentor's approval to share information; To create a Google sheet to track all participant information
Process Templates	Internal	To track all student poster submissions through the course of the project
Google Forms Templates by Group	Internal	To gather student name, poster number, abstract and picture information by discipline; easily transferable to the web pages
Process Templates	Internal	To provide an accurate list for upload to the website and addition to the program

Recruit student oral presenters. Initial responsibility for identifying oral presenters was given to the sites. The Principal Investigators (PIs) for each BUILD program were informed of the

event and asked to select students from their program to give presentations Reaching out to the sites for input on student presenters is recommended for any similar symposium because the sites are best suited to know student progress and readiness for the national stage. This decision was made in the early planning stages.

Sample Table 5: Recruit student oral presenters

Toolkit Template/Section	Audience/Stakeholder	Purpose
Toolkit section: Initiating Phase	Internal document	To outline basic purpose and plan for the entire event
Email Templates by Group	Principal Investigators	To inform of and gather support for the virtual symposium, request student participants and outline deadlines
Email Templates by Group	Student Presenters	To provide pre- and post-information to student presenters for their participation in the assigned session
Google Forms Templates by Group	Student participants	To register participants and collect information in a spreadsheet for tracking and organizing student participation

Recruit moderators. Initial planning identified the need to recruit qualified moderators to mirror the experience of students' interactions with scientists in the field during in-person conferences. The team brainstormed an initial list of names and they determined that asking NIH staff to serve as moderators would lend the most impactful experience for students. Outreach was conducted through announcements at a regularly scheduled meeting of the Principal Investigators and NIH Program staff (the DPC Executive Steering Committee) and at an internal NIH DPC Program team meeting (DPC Leadership All Hands meeting), as well as through follow-up emails and personalized emails. The final matching of moderators to sessions considered the scientific disciplines of the oral presentations and moderator availability.

Sample Table 6: Recruit moderators

Toolkit Template/Section	Audience/Stakeholder	Purpose
Email Templates by Group	Session Moderators	To invite leadership from across the DPC to moderate sessions
Process Templates	Internal	To track and organize the moderators into a session
Email Templates by Group	Session Moderators	To provide specific information to moderators needed to lead sessions

Scheduling and Planning

Create session schedule. This activity was completely dependent on the number of students who were selected to give oral presentations and the number of moderators recruited. One challenge in planning was that the expected number of student participants exceeded the actual number of students who were able or willing to participate. Because the anticipated number was greater, students were provided with more session times than were necessary. This added to the burden of assigning session times and required additional inquiries to students. After times were assigned, students were emailed a link to a personalized Google doc, in which they were asked to upload their

slides and profile photo They also received a link for them to select a time to conduct a technology test. The team tracked students' progress, and sent reminders as needed, and they gathered the information shared by the students into a single document to upload to the website. Finally, students received a pre-session email providing connection information, confirmation of time and order of presentations, and the name of the moderator for the session, and a certificate after the event.

Sample Table 7: Create session schedule

Toolkit Template/Section	Audience/Stakeholder	Purpose
Process Templates	Internal	To track and organize the students into a session
Email Templates by Group	Student Presenters	To provide pre- and post-information to student presenters for their participation in the assigned session

Create a website plan. The team created a website from scratch using CSS on UCLA's privately hosted server. Each page was designed and planned to rollout in phases based on needed information. The process was quite simple: a mockup was created and edited in Microsoft Word, timing for each deliverable was established, branding and other graphics needed were identified and assigned a due date, and the text and graphics were applied to the webpage. This process was familiar based on previous website redesigns, and the expertise for all tasks was contained within the team. Frequent communication about the website was coordinated with the website rollout plan and was essential for timely and accurate website development.

A website design option that could be used for a similar symposium that does not rely on technical expertise is Google sites. Google sites can be used to create simple web sites and includes drag and drop editing, support for embedding HTML and Javascript, and integration with Google drive, among other features. For those with some background in web design, subscription and fee-based options include Adobe Dreamweaver, WordPress, and Weebly.

Sample Table 8: Create website plan

Toolkit Template/Section	Audience/Stakeholder	Purpose
Website Creation Template and Planning Phase	Internal	To plan the website and coordinate roll out with communication plan
Website Creation Template	Internal	To design up the website pages
Social Media Digest	Internal	To overview channels
Social Media Template	Internal	To design the social media campaign

Create a technology plan. The technology plan should use a platform that is familiar to the team and will be easy for participants to use. For the VRS, the team employed GoToMeeting, a platform used by the DPC frequently during remote meetings. Thus, the platform was familiar to both the organizers and the moderators. The platform also included some useful features for working with a large group, such as ability to disable cameras upon entry, mute all participants, and manage the flow of communication in the chat. A single meeting event could be used for all live sessions and the meeting invite was created and distributed through email, the website, and on flyers. This also allowed the students to invite guests, like friends and family members. Students were asked to test out the GoToMeeting platform a week prior to Virtual Research Symposium to ensure that they were able to

use the platform with ease and there was a reliable connection for their audio.

A technical director managed the flow of each session. Technical scripts were provided to the technical support team and moderators which timed the session slide-by-slide and provided a prepared script for the introduction and conclusion. Forty-five minutes prior to the session, the technical team opened the call. Thirty minutes prior to the opening of the session, students arrived early for tech run through (audio/screen sharing). Moderators joined the session about 10 minutes early for an audio test.

Each session had a technical lead who drove slides and elevated presenters, and at least one technical backup, who monitored the chat, provided technical assistance, and scrolled through slides. Both hosted the meeting, so there were two connections as 'organizers' in case of failure. Frequently, a third host was signed in and ready to address any participant questions, or student or moderator issues. A host opened every session, introduced the moderator and closed the session. A master slide deck for each session was compiled with all student presentations. Although some students preferred to advance their own slides, all slides were included in the master slide deck as a precaution in case the student presenting had a failure in their connection. Student presenters were also asked to separate their audio and computer feeds so that, in the event of a computer or connection failure, the student would still be connected on their phone and the technical lead could advance the presentation slides. Having multiple back-ups and planning for how to address potential connection and technical issues helped the sessions run smoothly by avoiding interruptions.

Sample Table 9: Create a technology plan

Toolkit Template/Section	Audience/Stakeholder	Purpose
Email templates by Group	Student participants	To complete a technical test for students prior to the event
Technical Script Template	Internal	To map the technical execution of each session
Technical Check-in	Internal	To standardize the check in process for student presenters and check the status of their technology prior to presentation

Create a program. The creation of a program provided the credentials necessary for student participants to cite this research symposium on their curriculum vitae. It also created a platform for a branded, cohesive description of the event, sponsoring collaborators and student participants. Designed asynchronously on a shared graphic design platform, the program was modeled after in-person conference programs including welcome letters, schedule at a glance, and highlights of participating programs.

Sample Table 10: Create brand-aligned program

Toolkit Template/Section	Audience/Stakeholder	Purpose
Social Media Digest	DPC Community (800+)	To engage student presenters and programs involved in the event using unified visual strategies

Create a communication plan. The planning phase included outlining the communication plan by identifying stakeholders and planning the timing and tools to communicate with each group. This section focuses on the content that went into that communication. The communication plan was

tailored for each audience to provide information pertinent to their role. The plan included: informing and engaging leadership; providing information and tools to the CommsWG to engage students; creating weekly and actionable communication email blasts for the entire DPC community to build excitement. Students were recruited by providing information, guidance, encouragement, as well as a certificate to reward and acknowledge their participation. Tailoring strategies to match the audience was efficient and effective.

Sample Text 11: Create a communication plan

Toolkit Template/Section	Audience/Stakeholder	Purpose
Planning Phase & Social Media Digest	All	To create an overall communication plan & branded experience for the entire project
Email Templates by Group	Principal Investigators and Program Implementers	To inform of and gather support for the virtual symposium; To request student participants; To outline deadlines; To provide site leaders with promotional information
Email Outlines & Social Media Digest	Student participants	To inform student participants of all information and requirements for the event
Email Outlines	Session moderators	To inform moderator of responsibilities and supports
Email Templates by Group	DPC Community (800+)	To inform community members of the event and provide actionable items for community engagement
Social Media Digest	DPC Community (800+)	To inform and engage followers and build audience anticipation for the event by using social media

Team Management

The CDC staff held meetings daily to manage the event timeline. To focus a developing workload, the team assessed the tasks being done, problem-solution strategies, and identified delegation or re-delegation of the tasks at the beginning of the week. At the mid to the end of the week, the focus shifted to align the week's task completion with the next week's priorities. The overlap of planning and executing allowed for pivots based on available time, staffing, current problems, and any other constraints.

Daily communication was key to the execution because it allowed the team to discuss changes and realign tasks and responsibilities, and the address issue of changing plans. Collaboration was needed to find solutions and redesign, rewrite, or readjust when needed.

Key to the success of the event was understanding how to support individuals. This included sometimes reassigning a task to reduce workload or finding a more efficient way to complete a task.

Some of the plans and team strategies included:

- Holding meetings & discussing changes—openness to feedback, willingness to share ideas
- Check in on work-loads—asking questions, listening to answers
- Request approval for changes, if required—handled by the person most likely to get the fastest response
- Dividing tasks into parts—what can be done now, with current information; what can be done

later, when more information is available
- Getting processes in place for stakeholder interaction—brainstorming across activities and dependencies for actionable, doable requests
- Communication—planned, clear asks, few words, consistency
- Personal check-ins—who is overwhelmed, shifting loads, reducing asks, finding efficiencies

Monitoring/Controlling

As expected during the execution of the plan, changes occurred which required intervention and redirection. The project leader must assure that, with these changes, the goals of the project would still be met. This is one reason that the initiating phase is so important. If the leader is unclear of the scope, goals, and success measures, it becomes impossible to weigh the impact of changes. For this event, the last week prior to the event was critical, so the team met multiple times a day to respond to problems and create solutions. The lead was responsible for maintaining focus on the goals and guiding the team to solutions. Several strategies were employed:

- Cross checking all lists and links
- Adjusting goals based on daily progress
- Updating audiences about changes based on what they needed to know
- Applying a phased approach to hard deadlines
  - Day 1: dedicated to hosting the opening session, and continuing to upload student posters.
  - Day 2: completed all uploads and the team tested every link before rolling out the poster session, which was announced with an email to the entire community.
  - Day 3: hosted all remaining test sessions for student presenters and finalized the next session's technical script.
  - Day 4: hosted an oral presentation session, followed by completing the technical scripts for the two sessions on Day 5.

After all other events were completed, the focus turned to post-event tasks. A tracking document was used to note which students indicated their work could remain on the website or if it needed to be removed. The team created and distributed certificates of participation to all student poster and oral presenters. These were designed in Canva so they could be branded, and distributed through the individual Google folders for each student. This streamlined post-event email communications because the team sent the same congratulatory email to all participants and notified them about how to access their certificate.

In summary, implementation of the event depended upon determining what was essential, auditing for accuracy, establishing clear deadlines, thinking about the needs of different audiences, and designing processes that could be delegated. All of these aspects would have collapsed if the team members had not communicated and asked for help when needed. The delegation and completion of tasks depended on teamwork, leadership and communication.

Closing

Closing a project means taking time as a team to document and discuss project specifics. The team should document what was done through a summary report, such as this one, assess goals to evaluate the project's success and identify project strengths and areas for improvement. Feedback from outside the team is an important source of accuracy. For this project, two primary areas for improvement were identified: increased planning time and inclusion of partners in planning and execution of the project.

Some Main Takeaways from our experience:

1. Shared vision supports open collaboration
2. Projects must lean into the strengths of participants
3. Shared projects require shared tools--use what you have!
4. Regular, scheduled communication is key
5. All team members should know & participate in the communication plan
6. Understanding what is important to stakeholders shapes targeted communication and increases effectiveness
7. Trust your team to do the work and ask for help when required
8. Individual commitment to this project made completion possible
9. Centralized and collaborative leadership facilitated project success
10. Flexibility in perfection, planning, and roles was a must

Some thoughts to scaling this project:

1. Focus on what you and your team do well
2. Be realistic about the scope of your project
3. Align timelines to scope and build in extra time—it always takes longer than you think!
4. Take time to structure planning
5. Identify dependencies (what needs to be done BEFORE moving to the next step) and revisit them through execution
6. Adjustments will happen
7. Assign an auditor at different stages of completion
8. Prepare staff so that they are cross trained and can assist at pinch points in the process

Final reflections

The word "consortium" means a community doing something together that could not be done by any one part of that group. Through the response of collaborative efforts, the Diversity Program Consortium was true to its name. The "Stay Connected" brand and consistent communication reinforced the action of connection. Through this event, the team embodied the respect for the value of individual contributions placed in the context of collaborative effort. This was a defining moment for the Communication and Dissemination Core in demonstrating their purpose and role in the DPC, and showing the potential of unified effort and the powerful good that can be done to support the broader consortium.

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See our Tool Kit for an easy to follow guide incorporating the following templates & outlines. There are two sections: an overview section including all five phases of project management and a template and example section.

Templates and Examples include:

- Project Management Plan (Asana)
- Process Template
  - Steps for processing data
  - Tabs for organizing data
  - Steps for creating a schedule for oral presenters & moderators
- Email Templates by Group
  - Introduce the project to leadership
  - Recruit moderators
  - Student oral presenters
  - Student poster presenters
  - General audience
- Google Forms Templates by Group
  - Student poster registration
  - Feedback for virtual poster hall presenters
  - Student oral presenter registration
  - Participant surveys
  - Attendees survey
- Technical Templates
  - Website Plan
  - Technical scripts
  - Technical check-in
- Social Media Templates
  - Social Media Digest
  - Social Media Template

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