

NIH Diversity Program Consortium

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TOOLKIT

A Guide to Hosting a Virtual Research Symposium

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Diversity Program Consortium

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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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Toolkit Introduction: Overview Section

As a follow up to the hosting of a virtual research symposium, the communication team assembled this tool kit to guide others through the process. The toolkit follows the project management's five phases: initiating, planning, executing, monitoring and controlling, and closing.^{1,2} While the overall process section does describe the phases, it was created as a worksheet that could guide the reader through the different aspects of planning. Following the overall process section are templates or examples that provide further details.

For further details on this event, please refer to the report, *Hosting a Virtual Research Symposium* at [diversityprogramconsortium.org/pages/tech_report]. The report describes the challenge of planning an event in 25 days and was the impetus for this supporting toolkit that translates our accomplishments and lessons learned into practical support for teams planning similar event.

We hope that this toolkit supports the success of virtual research experiences. Use and expand as needed through your project. This is a working document and not a ridged guide. If you would like to share your modifications or suggestions for improvement, please email them to cdcore.cec@gmail.com.

¹Project Management Institute. (2004). *A guide to the project management body of knowledge (PMBOK guide)*. Newtown Square, PA: Project Management Institute.

²Mulcahy, R. (2011) *PMP Exam Prep* (7th Ed.). Newtown Square, PA:RMC Publications.

Initiating Phase

The primary function of the initiating phase is to think through the big picture of your event. Without this process as an anchor, you will become lost in the deadlines and detours of your project. Time pressure may tempt you to skip this thinking process, but that decision is an error. Having a concrete description of your purpose, scope and capacity is essential. Further identifying your supports and limitations help you to set measurable and achievable success goals.

Steps	Exploring Questions
Purpose (community, project, point)	What is your planned project?
	What community are you serving? or Who are your customers/clients/stakeholders?
	What are the needs of this community (customer/client/stakeholders)?
	What is your purpose for this project (the point or reason of the efforts)? How does your purpose fit the community (customer/client/stakeholders)?
Scope	Who can participate? Who are you inviting or targeting?
Risks	What might go wrong?
	How will you mitigate that?
Capacity	Who can work on this project?
	What are their skills?
	What are the teams' strengths? (communication, shared responsibility, leadership style, history of success, flexibility, receptivity to feedback, etc.)

	What are the teams' potential weaknesses and how can you leverage strengths or tap resources to compensate?
Support	Who can offer resources (money, time, communication, effort, etc.) to this project?
Limitation	What limits this project?
	Are those limits critical? How will you mitigate them?
Success Factors	What does success look like?
	How will you measure that?

Planning

Project management requires a lead to coordinate the entire project and make decision calls when problems arise in real time. The project itself can be planned by the lead, but collaborative leadership is a suggested style to maximize the assets of the team through engagement. Project timelines always start with the due date and moves backward, assigning milestones. Work is ordered based on dependencies (what must be done before moving to the next step). Leadership, delegation and personal responsibility are essential. Communication within the team and to various stakeholders is critical. Additionally, the team must adopt standard processes, tools and storage plans, and flow of information. Redundancy for technology is crucial to success. Work was not assigned based on hierarchy; work was assigned based on skills. The next steps are meant to guide you through the various aspects of the planning process.

Who is going to serve as Project Manager (lead): _____

Set major milestones

Brainstorm what your major tasks are (recruit students, schedule talks, etc):

Add them to the table below with the due date:

Date	Milestone

Identify major activities, collaborations, tools, and lead

Working from the milestones, identify the major tasks that would need to be completed and list.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Identify collaborators, tools and leads for each project. In thinking about tools, consider how information is going to be passed between those working on the project and gathered from outside the

project. Brainstorm the tools and technologies that you already have available and ones that are publicly available. Consider issues of ease of use, team proficiency, and issues of security and privacy. Then align that information in the chart below, expanding as needed.

Activity	Collaborators	Tools	Lead

Detailed planning is key to success

Think through how these processes are going to connect to each other. What actions should happen first based on what you need to know early on. This is a way of identifying dependencies, or actions that need to happen before another action can be done, for the projects. Map out your information flow for each activity then add to those maps who is going to manage each step of the process. (example below)



Plan the communication by stakeholder group integrate into the work flow by determining the timing and frequency. It may help to brainstorm all stakeholders and communication tools available prior to creating the plan.

Stakeholder group (list)	When & How Frequent	Communication Tools

Hosting a virtual event requires the use of technology. Here is a space to brainstorm and sketch a technical plan.

1. Overall plan for hosting (include live sessions, website presence, displayed content like schedules, descriptions, pictures, posters, or program, interactive spaces, etc.)
2. Technical expertise on your team (name/skills)
3. Tools already available
4. Tools/programs that could be purchased
5. Rate the important tools (essential to optional)
6. Revisit major activities and add any related to technology that might have been overlooked (website development, video conferencing, data gathering, etc.)

Creating a Project Plan

Create a project plan with the milestones, activities and task details (Asana template, p. 13). On the template, milestones are listed and then the major activities have assigned tasks. What you do not see is the assigned team member and due dates. In addition, there may be details and emails within the task that are not in this view.

This plan is the culmination of all of the planning you have done. It should be detailed, doable and align the project tasks with the project goals. Make sure to include assignments to team members and due dates for all tasks. While there are many free project management apps like Asana or Monday.com that require minimal exposure to use, you can use Google sheets or Microsoft Office Excel, to create a calendar or other tracking strategies. Also, Microsoft Project is a valid option, but allow time for staff to be trained. Here is a template to organizing your information into a project plan. Organize tasks in order of due date to provide a flow of the work. *Note: Generating specific task frequently requires editing your previous plan due to recognizing overlooked details. This is part of the process!*

Major Activity: _____

Activity Lead: _____

Tasks	Team Member(s) Assigned	Dependent on (list, if needed)	Technology Tools needed	Due Date

Repeat, as needed.

Now you're ready to move to the Execution stage!

This is where you do what you planned. We have created some templates and examples to assist in this process. As social media campaigns are a relatively new engagement strategy, we have assembled a short social media digest to assist your planning and execution.

To best understand how these templates and examples were coordinated into the project, please see our Closing Report. Also, the Asana

See the Templates & Examples Section

- 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

Monitoring/Controlling

As the execution of the plan progresses, changes can occur which require intervention, creativity, and redirection. The project manager is responsible for realigning to the goals of the project. Some of the challenges that we experienced as a team were:

1. Auditing for accuracy
 - a. Poster presenters: cross checking from original registration lists, received posters and pictures, uploaded documents, website lists, program lists, and email invitation lists, website postings and each hyperlink to every document; students were accurately listed on the website and program.
 - b. Oral Presenters: communication with programs, students, and moderators to ensure that the scheduled session for testing and presenting was confirmed and in the appropriate time zone; students were accurately listed on the website and program
2. Daily communication to solve last minute problems
 - a. What's missing?—we forgot to plan testing, so adapted to schedule
 - b. Thinking across audiences—tailoring communication to different groups was KEY!
 - c. When do audiences need to know (when is too late; when is too early because you don't yet know the details)
 - d. It always takes longer than you think! What can you cut? What tasks need to be shifted? Who can help?
 - e. Interacting with stakeholders (what was needed, answering questions, solving problems, providing alternatives, ensuring positive experience)
3. Determining what could wait
 - a. Testing later speakers before hosting the opening session
 - b. Opening session completed before final checks on the poster hall
 - c. Creating the next technical scripts until completion of the upcoming session

Predict areas to audit for accuracy

- 1.
- 2.
- 3.

Layout a plan for communicating those :

Who/When/Frequency/Topics

Think of ways to phase the execution or plan out the tasks based on time:

1. What are your last-minute tasks (unavoidable delays)?
2. How can you manage those in order of priority and by delegating across the team?

Closing

The temptation to quit when the work is done can be overwhelming. But that leaves the project incomplete. Writing up the results and understanding what went well and how to improve provide the foundation for the next project and the increase in productivity for the team. Take some time and consider the following points.

Was your project successful?

Success Factors	Result

Evaluation from others:

1. Who were your different stakeholders?
2. How can you glean feedback from them?

Evaluation from the team:

Successes	Recommendations for Change

Some final thoughts on this project:

1. Shared vision supports open collaboration
2. Projects must lean into the strengths of participants
3. Shared projects require shared tools
4. Regular, scheduled communication is key
5. All team members should know & participate in the communication plan
6. Communication made changes successful
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 facilitates the project success

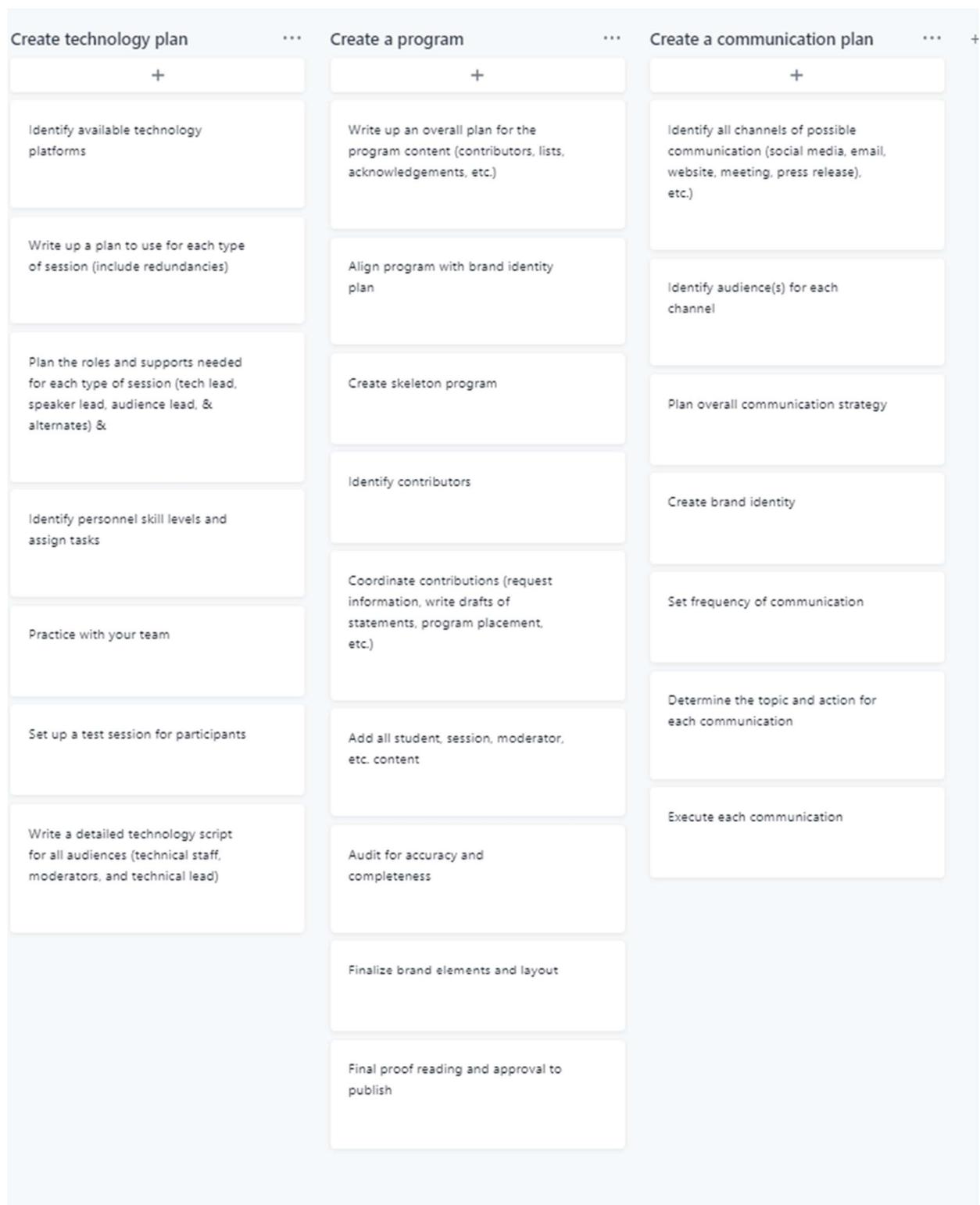
Templates & Examples Section

This section provides templates or outlines with key aspects of tasks. They are based on the communication we sent to various stakeholders, technical scripts that we provided to different stakeholders and more. We have added a special section on social media planning to support the integration of digital platforms into your project. We found our social media outreach very effective in reaching our student participants and in boosting our overall presence on these communication channels.

Project Management Plan (Asana)

Milestones	Recruit student poster presenters	Recruit student oral presenters
+	+	+
◊ Recruiting Emails Sent	Create an overall plan for student poster presentation (what students, information collection, display & interaction)	Create an overall plan for student oral presentations (how nominated, information collection, display & interaction)
◊ Student Registrations Due	Write recruitment communication	Write recruitment communication
◊ Nomination of Oral Presenters Due	Write recruitment communication	Write recruitment communication
◊ Student Posters Submitted	Send recruitment information	Send recruitment information
◊ Student Oral Presentations Submitted	Collect student data (including name/photo, mentor approval and poster information)	Collect student data (including name/photo, availability, mentor approval, and talk information)
◊ Opening Session	Track student submissions	Track student submissions
◊ Poster Hall Opens	Compile student submissions into planned groups (ex. disciplines, research focuses)	Schedule student talks into planned sessions
◊ Session B, C, etc.	Upload to the website	Schedule student technology test
◊ Closing Session	Audit all student data for accuracy and completeness	

Recruit moderators	Create session schedule	Create website
+	+	+
Create an overall plan for sessions (dates/times, number, length, & number of presenters)	Assign students to sessions (group by discipline, if possible)	Create overall website plan (phases suggested to align with information flow)
Brainstorm possible source of moderators	Assign moderators to sessions (match expertise with student presentation, if possible)	Identify resources for website changes
Write moderator recruitment communication (brief directions & possible times)	Create a master lists of sessions with moderators & all students, BUILD site, Talk titles in order and send to moderators	Align website with brand identity plan
Send recruitment information	Audit all information for accuracy and completeness	Mock-up website pages
Schedule moderators for each session	Provide master list to website and program leads	Build skeleton of pages ahead as is possible
Send session information to moderators	Provide details to student presenters and moderators	Phase One: Home page
Send a reminder of time, connection information, technical script with directions	Create a master slide deck for each session (opening/closing, announcements, technology tips, etc.)	Phase Two: Calendaring actions
Send thank you to moderators after the session		Phase Three: Names of student presenters/Posters
		Phase Four: Poster Hall pages
		Audit for accuracy and completeness



Process Templates

Steps for Processing Data

Purpose: Collect and track poster participant data. Steps were added so that our administrative support team could assist with processing the data and that we all could track what was done.

Timing: initiated and updated throughout the process

Process steps:

1. Assign in field a student poster number: Physical Sciences 1000, Biological Sciences 2000, Health Sciences 3000, Social Sciences 4000, Engineering 5000, Computer & Information Sciences or Math/Statistics 600
2. Does the student have a comment or question (please enter Y/N)
3. Create an individual folder for each student to upload their poster and add the link to the cell.
4. Send the student email with link for the google folder
5. Confirm if poster is uploaded to the google drive (please enter Y/N)
6. Confirm if they submitted a picture (please enter Y/N)
7. Sort all confirmed students (submitted poster) by: (requires Excel)
 - a. Discipline
 - b. Research area
 - c. Last name
 - d. First name
8. Create individual Word documents for each discipline and transfer information from Excel document. Each Word document should note the specific research field and then list each student in order, including:
 - a. Poster #
 - b. Picture
 - c. Name
 - d. BUILD site
 - e. Title
 - f. Abstract
9. Upload poster to DPC website file folder
10. Add student to the appropriate discipline page [poster #, picture (if available) name, BUILD, title & abstract]
11. Link student poster title to the uploaded poster
12. Audit the accuracy and the links for all web pages

Tabs in the Google Sheet

1. Form Responses (auto filled from google form)
2. Students by Build site
3. List organized by Poster # all registrants
4. Multi-sorted by Discipline, Research area, Last Name, First Name (no poster; crossed out)
5. Actual poster presenters copied to Word for program/website (poster #, email address, first & last name)

Steps for Creating a Schedule for Oral Presenters & Moderators

1. Email site leadership to nominate students for oral presentations
2. Email students and send google form for registration
3. Create a chart for all presentation times
 - a. Indicate all student times available, site, discipline & research area
 - b. Review discipline & research areas for common fields
 - c. Indicate all moderator availability
 - d. Review moderator expertise and match to student presentations
 - e. Finalize choices (consider demographic, site & topic balance)
4. Track receipt of required documentation (ppt, pictures, etc.)
5. Compile single document with all session's information
6. Email oral presenters time confirmations & instructions
7. Email moderators time confirmation & instructions
8. Email students link for signup (google doc) for technical test connection
9. Email reminders to students & moderators
10. Email thank you and survey

Email Templates by Groups

To Leadership

Initial Recruitment

Email to leadership

- Event and context
- Details about the event (dates, descriptions, overall details)
- Specific ask: What do you want
- Deadline for ask: Dates
- Benefit to participants and leadership
- Contact information & closing

Include a communication for students (if this is part of your ask)

- What the event is and when
- Benefits to participants
- Specific ask: What do you want them to do
- Deadline for ask: Dates
- Link to direct registration form (if used)
- Notes on privacy, session recording, permissions needed (research mentor, photo release)
- Contact information & closing

Follow up

- Thank you
- Reminder of event and what is still open
- Link to direct registration form (if used) or other action
- Contact information & closing

To Moderators

Initial Recruitment

- Event and context
- Details about the event (dates, descriptions, overall details)
- Specific ask: What do you want with general overview of specific needs
- Deadline for ask: Date
- Contact information & closing

Invitation to Moderate

- Review of event
- Session options (date, time & student research topics provided)
- Review of moderator's responsibilities
- Specific ask: Confirmation and date/time
- Contact information & closing

Details for session

- Thank you
- Confirmation of time, purpose, and attendees
- Specific outline of requested remarks
- Outline of the session (summary of technical script)
 - Opening (who, slides, introduction)
 - Moderator (time marks for transitions, speakers in order)
 - Closing (who, slides)
- Hosting the Q & A (detailed guidance)
- Technical support teams (names, contact info)
- Call in time (early for technical check)
- Call in technical information
- Thank you

To Oral Presenters

After student has been selected

- Congratulations
- Link to direct registration form
- Thank you

Follow up emails (periodic reminders with hard deadline)

- Thank you & review of event details
- Action items: request availability and request documents (we created a google folder using their name and sent them a link for them to upload their photo & slides)
- Deadline for submission
- Closing & contact information

Final email (pre-event)

- Confirmation of session information (date and time)
- Short description of session (moderators, length of talk, length of Q &A)
- Ask: Register for a test session (hyperlink to google doc with schedule)
- Technology directions (Included as these are specific and transferable across types of events)
 - Please arrive **30 minutes prior** to the beginning of your session.
 - Presenters should have a **working internet connection**. You should have a “buddy” who will attend your presentation with a copy of your PPT file in case your internet connection fails. We can make that person the presenter. You can also upload your power point into **your Google Folder** one day prior to your presentation in case we at the CEC need to show your presentation.
 - **Your first slide** should include your name, your BUILD program and university, your major, your mentor, and a photo.
 - Please **do not use animations in your slides** as they can slow down your computer processing time.

- Please **do not use videos in your slides** as do not play in most video conferencing platforms.
- **Limit** the number and size of your pictures.
- Please **do not rely on the computer audio** as connection issues can create static. You can call-in through the phone and enter the access code provided below
- When presenting, **close all other applications**. The only two open programs on your computer should be the technology application and your presentation.
- When it is your turn, a CEC admin specialist will **unmute you and elevate you** to presenter status on GoToMeeting.
- Be sure that your presentation is open and you are ready to begin.
- You will have to accept the prompt to share your screen **THEN** switch your PowerPoint to “Presentation” mode. If you are using Adobe, you are encouraged to share the full screen right away.
- Once the presentation has concluded, an admin specialist will take back the presentation controls and display a “Q&A” slide. Your session moderator will facilitate the Q&A.
- Admin will give presenter privileges to the next presenter, etc.
- Order of presenters (names, sites)
- Session technology support team (Names)
- Call in information
- Summary of actions needed

Follow up email (post event)

- Thank you & congratulations
- Certificate/award (attached or located in google folder)
- Social Media promotions & resources
- Thank you

To Poster Presenters

Note: Invitation for students to participate was delivered by leadership. Students responded to us by completing a registration form

After student has registered (follow ups sent with hard deadline)

- Thank you & review of event details
- Link to Google Folder: request upload of documents (we created a google folder using their name and sent them a link for them to upload their photo & poster)
- Deadline for submission
- Closing & contact information

Invitation to attend sessions (pre-event)

- Confirmation of poster received and posting
- Invitation to attend all sessions (schedule and connection information)
- Advised to watch for an email launching the poster hall

Launch of the poster hall

- Announcing opening of the poster hall
- Links to the hall
- How feedback is provided (asking questions, providing answers)
- Encouragement to broadly distribute

Follow up email (post event)

- Thank you & congratulations
- Certificate/award (attached or located in google folder)
- Social Media promotions & resources
- Thank you

To General Audience

We used a standard monthly communication (Email Blast) to promote the event and build excitement across the consortium. The communication branded the event and was sent through mail chimp to track views and interactions. The emails were every Friday and featured a launch of a new aspect of the event and an action we wanted the audience to take:

1. Launch of event homepage (visit)
2. Finalizing of symposium schedule (calendar the events)
3. Sharing resources and student presenters on website (visit)
4. Opening day—completed program & opening sessions (log in & download program)
5. Poster Hall open (visit & ask a question)
6. Poster Hall extension (visit & ask a question)
7. Monthly recap with results (download program & resources)

Google Forms Templates by Group

Student Poster Registration

Purpose: gather student contact information, research poster information, science discipline & research area and an assertion of mentor's permission

Timing: Students completed this form through an invitation by their program leadership

Data: Exported all fields to a google sheet (became the basis of all tracking for student poster presenters)

Questions:

1. Email (collected automatically)
2. First name
3. Last name
4. Major
5. Program (choosing from options)
6. Mentor's name
7. Mentor's email address
8. Discipline (choosing from options)
9. Specific are of research (examples given, but short text answer)
10. Title of poster
11. Research abstract
12. Questions on information privacy (check all that apply)
 - a. Remove photo
 - b. Remove poster
 - c. Remove my research title
 - d. Remove my research abstract
13. Assertion "I have notified my mentor of my participation in this symposium and its public nature"
14. Comments/questions

Feedback for Virtual Poster Hall Presenters

Purpose: gather questions for students from the audience viewing the posters

Timing: asynchronous Q & A, button to "ask a question" on each poster hall website page

Data: Exported all fields to a google sheet (connected those asking questions and student poster presenters via email)

Questions:

1. Email (collected automatically)
2. Your name
3. Student poster number
4. Student name
5. Question

6. Request for feedback on the poster hall

Registration for Oral Presenters

Purpose: gather student contact information, availability, research poster information, science discipline & research area and an assertion of mentor's permission

Timing: Students were nominated by the program and were sent an email with a link to complete this form

Data: Exported all fields to a google sheet (became the basis of all tracking for student oral presenters)

1. Email (collected automatically)
2. First name
3. Last name
4. Major
5. Program (choosing from options)
6. Mentor's name
7. Mentor's email address
8. Discipline (choosing from options)
9. Specific are of research (examples given, but short text answer)
10. Title of presentation
11. Research abstract
12. Choose times available
13. Sending in a photo (email address given)
14. Questions on information privacy (check all that apply)
 - a. Remove photo
 - b. Remove poster
 - c. Remove my research title
 - d. Remove my research abstract
15. Assertion "I have notified my mentor of my participation in this symposium and its public nature"
16. Comments/questions

Participant Surveys

Purpose: gather information on the student experience

Timing: sent out after the event's completion

Data: Exported all fields to a google sheet

1. Participation in virtual poster hall and oral presentations (decision tree)
2. For Oral Presentation (needs improvement, satisfactory, excellent, n/a)
 - a. Frequency of communication
 - b. Response time of communication
 - c. Clarity of directions
 - d. Ease of technology
 - e. Technology support

- f. Symposium website user experience
 - g. Professionalism of event
 - h. Process of Q &A
 - i. Moderator facilitation
3. For Virtual Poster Hall
 - a. Frequency of communication
 - b. Response time of communication
 - c. Clarity of directions
 - d. Ease of technology
 - e. Technology support
 - f. Symposium website user experience
 - g. Professionalism of event
 - h. Process of Q&A
 4. Provide additional feedback
 5. Overall Experience [5-point Likert scale; unsatisfactory (1) to Excellent (5)]
 6. Please tell us what was most rewarding about this experience.

Attendees Surveys

Purpose: gather information on the attendee experience

Timing: sent out after the event's completion

Data: Exported all fields to a google sheet

1. Which oral presentation session did you attend? (list of all sessions)
2. What went well during the oral session (check all that apply)
 - a. Technology
 - b. Introductions, overview & conclusion
 - c. Flow of presentations
 - d. Student presentations
 - e. Question and answer session
 - f. Other (fill in)
3. What positive aspect stands out from any of these sessions?
4. In your experience, what could have been improved during the session(s) you attended (check all that apply)
 - a. Technology
 - b. Introductions, overview & conclusion
 - c. Flow of presentations
 - d. Student presentations
 - e. Question and answer session
 - f. Other (fill in)
5. Can you specifically describe how this could have been improved?
6. In the poster hall, how many posters did you review?
 - a. 1-5
 - b. 6-9

- c. 10-15
 - d. Over 15
 - e. Did not review posters
7. Did you submit a question? (yes, no, did not review posters)
8. What kept you from reviewing the posters?
- a. Time limitations
 - b. Couldn't think of a question
 - c. Didn't know how
 - d. Did not view posters
 - e. Other
9. What types of activities would you like to see in a future virtual research symposium?
10. Any final feedback that you would like to provide?

Technical Templates

Website Plan

Purpose: To design the look and build of the website to coincide with the gathering of information, communication to stakeholders and the timing needed for the event

Timing: initiated and updated throughout the process

Process steps:

1. Outline the needed information on the website for all audiences
 - a. Home page for all summary content
 - b. Event times
 - c. Connection information
 - d. Student information
 - e. Student content
2. Identify dependencies for workflow and communication
 - a. Unknown information
 - i. Number of student participants
 - ii. Type of research to be presented
 - iii. Number of oral presentation sessions
 - iv. Number of moderators needed
 - b. Set Deadlines to gather information that are sufficient to create website pages
 - i. Poster
 - ii. Nominations for oral presenters
 - iii. Submission of posters
 - iv. Recruitment of moderators
 - v. Scheduling of sessions
 - vi. Confirmation of oral presenters and moderators
 - vii. Connection information finalized
 - viii. List of all participants
 - ix. Creation of a program
 - x. Creation of all poster hall pages (recommendation: separate the launch of the symposium from the opening of the poster hall)
3. Plan & execute workflow
 - a. Design all webpages
 - i. Create mockups of all webpages
 - ii. Create a brand for the event & integrate that brand across all pages
 - iii. Obtain all necessary approvals
 - b. Identify strategies for promotion (email, social media, etc.)
 - i. Identify communication channels (email, website, social media, etc.)
 - ii. Identify all audiences and map clear steps with audience action for each step
 - c. Update webpages as information is available
 - d. Audit for accuracy BEFORE pages 'go live'
 - e. Coordinate website page launch with planned communication
 - f. Modify as needed then launch and track engagements

Technical Script Template

Session Title

Day, Date, Time (in the time zone of recipient)

Host: Name

Communication during the session (in order of preference):

(examples: private chat, text, group text, email, etc.)

Roles (names to be added):

Technical Lead

Hosts for call

Controlling slides/sharing screens

Monitoring chat for technical support

Monitoring chat for Q & A

Alternates

NOTES:

** Two - three individuals should be logged into the technology as the host/organizer/opener of the call (redundancy to support the integrity of the call)*

** Text should be written out for each slide for two reasons. First, the technical team will be clear when they should advance to another slide. Remote teams do not have non-verbal cues to lead their actions. Second, delivery is improved by reading, if you practice. 😊*

** Always practice with all presenters prior to a talk*

** If possible, host a copy of the speaker's slides in the master slide deck as a back up in case of technology failures*

** Have the speaker call in separate from their computer to protect the integrity of their connection. Should one fail, they are still connected to the session.*

** All technical scripts should be tailored to the users (moderators, technical support, speakers)*

Opening Remarks: Name (# mins total)

Slide 1 (Title):

Roles/Names

Welcoming Text

Slide 2 (Technical Review):

Roles/Names

Explain interface and how to ask for assistance

Slide 3 (Announcements):

Roles/Names

Highlights for the audience upcoming events

Slide 4 (Introduce the moderator):

Roles/Names

Introduction of moderator

By time (this is a time 'mark' to keep the session on schedule)

Welcoming Remarks & Moderating Oral Presenters (# mins total)

Slide 5 (Content):

Roles/Names

Frequently, the moderator will speak without a script. Provide a number of minutes and suggested topics to cover. This will provide a guide for the technical team to anticipate when to move forward in the slides.

By time (this is a time 'mark' to keep the session on schedule)

Slide 6 (First speaker):

Roles/Names

Introduction of speaker & speaker projects slides (or hosted by technical team)

By time (this is a time 'mark' to keep the session on schedule)

Slide 7 (Second speaker):

Roles/Names

Introduction of speaker & speaker projects slides (or hosted by technical team)

By time (this is a time 'mark' to keep the session on schedule)

Slide 8 (Third speaker):

Roles/Names

Introduction of speaker & speaker projects slides (or hosted by technical team)

By time (this is a time 'mark' to keep the session on schedule)

Slide 9 (Final speaker):

Roles/Names

Introduction of speaker & speaker projects slides (or hosted by technical team)

By time (this is a time 'mark' to keep the session on schedule)

Slide 10 (Q&A):

Roles/Names

How will the Q & A be hosted?

- Audience puts the questions in the chat and the moderator reads the questions from the chat
- Audience raises a hand, is acknowledged by technical support. Technical support private chats the moderator who announces the individual with a question.
- Other options may arise. Controlling audio by ordering who is to ask a question provides a smoother exchange. Otherwise attendees may speak over one another.

By time (this is a time 'mark' to keep the session on schedule)

Closing Remarks: Name (# mins total)

Final slides (Reminders/Acknowledgements/Thank you):

Roles/Names

Close out the session

Technical Check Template

1. Call in 30 minutes early
 - a. Go through the following tests with each student
 - b. In order of arrival

2. Audio test (had all read their name, site, and title)
 - a. If audio issue, had students try alternate.
 - b. Use headphones, don't use headphones, use computer audio, phone (highly preferred)
3. Test presenter mode
 - a. Elevate to presenter
 - b. Students run all slides
 - c. Technical lead takes back the presenter status
4. Get the correct pronunciation for all names for the moderator
 - a. Added to the chat in phonetic form
5. Cover all details and plans with moderators
 - a. Overview
 - b. Ask for questions

Social Media Templates

Social media (SM) Digest

Given the age of undergraduate students following a traditional academic path, most students can be categorized as either Gen Z or Gen Y (Millennials). Both of these groups are “digital natives” and are adept at using technology such as personal devices (mobile phones, tablets, laptops) and new digital media, including the current popular social media applications/platforms. While Gen Y remember a time without smartphones and social media, many in Gen Z have had them since childhood. Gen Z experiences life as a *digital reality*. Marshall McLuhan’s thesis that “the medium is the message”¹ rings true—social media is not used as a tool for communication, it is unextractable from communication itself. For many, if it’s not on social media, it may as well not exist. Beyond its ubiquity, SM requires an extension of the self into the digital sphere. Managing an SM profile is a perfunctory task, but a complex and effortful endeavor where users curate and construct their online selves. Users are performing their identity on the digital stage. This applies not just to individual users, but to organizations, institutions and corporations online. And this applies to your virtual event. How are you performing this event on the digital stage? What is your event’s identity? What does it symbolize and how do you want others to perceive it? Keeping these questions in mind as you think about your SM strategy.

For a virtual research symposium held within a defined community, SM leverages on existing relationships between users “IRL” (in real life). You have a captive audience you are interacting with in deeper ways than purely on SM networks. That said, having a healthy SM strategy is still important, not only because your audience can keep up on information faster and more regularly, but because the event is represented in their digital public sphere and culturally relevant to their norms.

Social Media Platforms

If you have an opportunity for market research before your event, you can take a poll or survey of what SM platforms students use most. The popular platforms for millennials and Gen Z are Instagram, Youtube, Facebook, Twitter, TikTok, Pinterest, Snapchat and LinkedIn. Not all these platforms are relevant for academia, so don’t rush to create a presence on all popular platforms. Your brand reflects the culture of your organization and field. Maintaining academic or professional culture digitally while engaging an audience requires selectivity and care. Like IRL, students understand the norm of modifying their behavior in different settings to fit into the culture.

For the purposes of creating a virtual research symposium, focus on Facebook, Instagram, Twitter and LinkedIn. According to the [Pew Research Center’s 2019 Social Media Factsheet](#), 79 percent of users age 18-29 use Facebook, 67 percent use Instagram, 38 percent use Twitter and 28 percent use LinkedIn. Each of these platforms have different features and limitations for users, and your content should be contoured accordingly. Posts on Facebook have no character limits, no requirements for a visual component, though users can upload up to 1,000 photos in an album. Instagram is a visual medium and users must upload a photo or video to participate. Instagram has a photo/video limit of 10 per post and a character limit of 2200 (although posts should have far below that many characters). Twitter does not require a visual component, but has a 280 character limit and users can upload either four photos, one

¹ McLuhan, M., & McLuhan, M. A. (1994). *Understanding media: The extensions of man*. MIT press.

video or one gif per post. LinkedIn requires no visual component, but users can upload up to nine photos and include 700 characters per post.

Social Media Marketing Strategies

Visual Engagement

SM is a largely visual medium. Engaging users on SM means applying visual design techniques and adhering to your brand in every single post. Posts need to be aesthetically pleasing/exciting while providing relevant information to your community. One of the most engaging visual strategies is using photos/videos of members in the community, either portraying individuals or groups in settings related to research. For example, visuals can include students presenting their posters at conferences, giving an oral presentation, in attendance at an academic or professional event, or doing scientific research activities. Due to the COVID-19 pandemic, there are few to no opportunities for taking new photos, so you will have to make do with past photos or videos. If you don't have past photos and are interacting with students on a completely virtual basis, consider planning for group screenshots or asking students for their own photos from previous events.

Online design tools such as [Canva](#) are making it easier for the everyday person to create visually-pleasing graphics. Canva is a design platform to create visuals in a variety of sizes (convenient for creating SM graphics) with access to design templates, stock photos, icons and shapes, fonts and other elements. Canva also has an option to create a brand kit you can use for creating visuals. Canva also hosts a blog with advice on designing for social media. Other design tools include Adobe Spark, Easil, PicMonkey, Stencil, FotoJet, BeFunky and Desygner. Create a brand or apply your existing brand to all graphics so the event becomes recognizable. Repeating the same colors, fonts, basic design and language to all promotions creates a consistency that users will appreciate.

Managing URL's with Link Shortening and Tools

Social media favors information that is to-the-point. Having one URL that can be used across platforms and help with limitations in characters and "clickability." For example, Instagram does not allow clickable links in a post caption. Using a shortened link allows users to easily type into a browser window. Link shorteners such as Bit.ly, Ow.ly, Rebrandly, Branch.io, or TinyURL can take a longer URL and shorten it to a randomized or customizable short link. Read the rules for each of these tools as some links cannot be changed after creation. Instagram does make a clickable link available in the "bio" section of the account profile. Many posts include the phrase "link in bio" where their audience can access the link. However, you can only include one link in your bio and it is impractical to change the bio link for every event. In this case, use link tools such as LinkTree, Flow.page, ContactInBio, Campsite or Bio.fm. These tools allow you to put all your relevant links (registration forms, newly published webpages, etc) without having to create multiple short links that may confuse your audience.

Scheduling Tools

If you have your content prepared in advance, consider using a SM management platform such as Hootsuite, Buffer, Sprout Social or Later. These platforms allow you to manage and schedule posts across multiple accounts. You can also track analytics to better inform the optimal times and days to post for higher engagement. Setting up a social media calendar according to your event timeline (ahead

of deadlines for registration and submission, promotion for attendees) can make the process simpler and easier to organize.

Leveraging Your Network

Are there leaders, professors, staff, students or alumni in your organization who make an impact in your community? Are they on social media? Event organizers can ask these community members to be “influencers” and share information on their own user profiles. If your network also includes other scientific organizations, university departments or campus clubs, reach out to their communications officers or social media managers and ask if they can share about your event. You can also “tag” their accounts on your posts, however, taking the courtesy to ask directly will help build stronger relationships that can benefit you in the long run.

Accessibility, Privacy and Inclusion on Social Media

Navigating SM means keeping in mind the needs, privileges and safety of its users. SM has limited capabilities in designing posts for those who use screen readers. If you are using Hootsuite to post content, you can add alternative text descriptions. You can also add the alternative text to the caption of your post if the platform’s character limit allows it. Caption all videos and gifs and use CamelCase for hashtags. Make sure your event website is also ADA compliant. More information on digital accessibility can be found at sources like digital.gov. The following are accessibility support resources provided by the SM platforms discussed in this toolkit: [Facebook Accessibility Support Features](#), [Twitter Accessibility Support Features: Images](#), [Instagram Accessibility Support Features: Images](#), [LinkedIn Accessibility Support Features](#).

Privacy and inclusion on SM must be considered to guard the safety and wellbeing of your community. For example, community members who identify as LGBTQ, or are gender queer/non-binary, may not be out to their immediate family members, despite being out online. Do not assume the gender pronouns for your users—non-binary or gender queer users will often include their preferred pronouns in their profiles. Incorporate gender-neutral language to the best of your ability. Do not tag or spotlight a community member without their permission. Consider that members of your community may be victims of stalking, violence or other harassment, and struggle with participating online safely.

Security

Keep your login information safe and set up two-factor authentication if possible. If you are managing social media from a personal device, be cautious not to mix up your accounts. Always read and re-read your posts and make sure they are being posted to the proper account. Watch out for spam accounts and solicitors. Do not respond to private messages on your platforms if you cannot verify that the user is part of your community.

Social Media Template

1. What social media platforms do your students use? If you don't know, ask them. Then create accounts on platforms that align with your organization's culture and needs.

2. What is being promoted or communicated? (like a virtual research symposium)

3. What platforms are best suited for this event?

Platform	Character Limit	Visual Requirements/Limits	Choose your platforms to use & why
Facebook	No character limits and can post links	Visual is not required, but permitted	
Instagram	Character limit 2200 (much shorter is preferred)	Requires a visual, 10 pictures max/post	
Twitter	280 character limit	Visual is not required, 4 photos, 1 video or 1 gif/post	
LinkedIn	700 character limit	Visual not required, 9 pictures max/post	

4. What strategies are you going to apply?

Strategy	Your options	Supporting tools/Recommendations
Visual engagement		Canva, Adobe Spark, Easil, PicMonkey, Stencil, FotoJet, BeFunky and Desygner
Link to other content		Bit.ly, Ow.ly, Rebrandly, Branch.io, or TinyURL
Create a bio		LinkTree, Flow.page, ContactInBio, Campsite or Bio.fm
Regular posting		Hootsuite, Buffer, Sprout Social or Later
Leverage your networks: <ul style="list-style-type: none"> • Influencers • Tags 		Google forms, direct contacts, internet research
Constraints <ul style="list-style-type: none"> • Accessibility 		ADA compliance. Facebook Accessibility Support Features , Twitter Accessibility Support Features: Images , Instagram Accessibility Support Features: Images , LinkedIn Accessibility Support Features .
Constraints <ul style="list-style-type: none"> • Privacy & Inclusion 		Ask before tagging, use gender-neutral language, follow photo release guidelines of your institution
Constraints <ul style="list-style-type: none"> • Security 		Keep your login secure, do not mix personal and private accounts, do not respond to private messages without verification, re-read before posting to look for errors

5. Track analytics and impacts to guide future postings.

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