



How to...

Design successful knowledge exchange events

This guide will help you design events to engage an industry, policy or practice audience, where people have been invited in their professional capacity. It provides a set of questions and prompts for you to consider during the planning stage, and tips on evaluating the impact of your event.

1. What do you want to achieve?

Consider what you want achieve by running an event. Do you want to increase awareness, hear a range of opinions, inform a debate, build a network, initiate collaboration with industry or something else? Would you like people to do something different at their workplace as a result of the event? Do you want the event to inform your research? Would you like further collaboration with the organisations you invite after the event?

Set clear objectives and ensure the invitees, format and follow-up are designed to achieve these.

Before you start organising, ask yourself: is an event the best means? Would a series of one to one meetings be better? How does this event tie into the other engagement work I am doing?

2. What support do you have available?

Organising an event effectively costs money, is labour intensive, intense on the day and requires follow up afterwards. You therefore need to ensure you have appropriate support.

As the academic lead you need to focus on your guests and the content of the event.

Having someone else **chair and facilitate** the event will free you up to focus on the content, to speak to people about your research and to network.

Appointing an **event manager** will ensure nothing is missed in the organisation or on the day. S/he will be the first point of contact on the day and will coordinate **support staff** responsible for ensuring the event runs smoothly (see Box 1). The event manager could be an academic or support staff depending on what is most appropriate in your context.

Many Schools and Research Centres have dedicated support for events. If you are not able to access support locally please contact the CAHSS Knowledge Exchange office to see how we can help.

Box 1. Practicalities on the day

Assign clear **responsibilities** for signposting, the registration desk, liaison with catering and technical equipment.

Brief speakers on the **audio/visual aids** before they are given the floor.

Have a **master list** of anticipated attendees and mark off guests as they come in. Alternatively, keep the badges not taken separately and record them after the event.

Have **spare badges** for unexpected guests and take their card so that you have details to add to the list for follow up.

3. Who needs to be there?

Draw up a list ensuring you know names, job titles, organisations, emails, phone numbers and postal addresses.

Identify why you are inviting each person, e.g., key policymaker or research and development budget holder. Identify your high priority attendees; these are the most influential people that you really want there.

Ensure your attendees are well looked after on the day (see Box 2).

Box 2. Taking care of your audience

Ensure name badges clearly display name and organisation.

Provide a delegate list for each participant with names, job titles, organisations and emails to help them to network.

Ensure VIP guests are greeted and introduced to appropriate people.

Consider assigning an informal “buddy” for people not already known to the group.

4. Design your event to meet your objectives

Did we mention that events take up a lot of time and resources?! Make sure you make it a worthwhile experience - for you and for your guests. Using your objectives as your starting point, design each part of your event in the most appropriate way. This section gives you some examples and tips.

Choose a format that will support your objectives

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| Are you interested to hear what participants have to say on a topic? | Make sure every participant has the chance to speak in groups or plenary. Assign rapporteurs to make sure everything is recorded. |
| Are you launching new research findings? | Present in an engaging way. Ensure plenty of time for participants to discuss the relevance of your research, how they might use it and what they would like from your future research. |
| Are you creating a networking opportunity? | Allow plenty of time, ensure you have the physical space available, provide refreshments, and ensure the A-list and new guests are taken care of. |

Create quality discussion as well as quality presentations

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| Chairing or facilitating | An active chair or facilitator will prompt questions and encourage discussion rather than just keeping order during a question and answer session. A strong chair will also mitigate the risk of one or two people dominating a plenary. |
| Encourage participation | Asking people to reflect on a question with the person next to them, before coming back in plenary, will allow guests to hear one another’s perspectives and can encourage more people to participate. |
| Focused discussion | Providing a focus for discussion, rather than asking ‘any questions?’ can make this part of the event more satisfying for both you and your guests. For example, you could ask practitioners to reflect on how the research can be used in their practice. Remember to factor in time for people to prepare their contribution. |

Looking for advice on designing events to engage the public? Have a look at the guidance from the National Coordinating Centre for Public Engagement
<http://www.publicengagement.ac.uk/plan-it>

| Consider group based techniques at larger events | |
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| Do you want people to work together throughout the event? | Getting people talking builds rapport. You could ask people to find out something unusual about their neighbour, or why they have come along today, or what they hope to take away from the day. |
| Do you want to gauge how much people know about a topic, or how confident they feel about doing something, before and after your event? | Using a long piece of paper, draw a scale 1-10. Give participants a sticker and ask them to stick it at the number that best reflects how they feel. Repeat at the end of the event and compare. You can do this anonymously by getting participants to write the number on the sticker and collecting them in to stick up yourself. |
| Do you want to hear why people have come? | Allow time at the beginning for people to share what they are hoping to get out of the event in pairs or threes. You can collect these either in plenary or by asking people to write them on post-its/flipchart. Ensure you refer to them during the event and manage expectations about what the event will provide. |
| Do you want to understand your guests' priorities and address these at the event? | Allow people time to discuss in small groups and ask them to come up with their most burning question(s) to bring back to plenary. This can help you avoid the situation where a few participants dominate a Q&A session. |

5. Follow up after the event

Ask colleagues to report any outcomes, ideas and leads to the event manager, even if they are following it up themselves. This helps record the longer term impact.

Contact each delegate by phone or email after the event to get feedback, explore potential leads for more work and/or collaborative opportunities, or hear whether the event has made an impression or impact so far.

Contact registered people who did not show up to explore potential leads and ask if they would be interested in finding out more.

Keep the mailing list for further events and promotion.

6. Assessing the impact of your event

You are attempting to capture evidence of the impact of your event as opposed to views on whether the event was successful. However, bear in mind that if the basics such as a pleasant venue and lunch are not in place, the event is likely to have less impact.

Clear objectives will help you to know what questions to ask in your evaluation. Go back to the objectives you identified at the beginning, then develop the evaluation accordingly.

Think carefully about the best way to get the information you need. It is useful to have quantitative data so that you can say, for example, "70% said they learnt a lot from the event". However, the most valuable feedback lies in the comments on what participants learnt and how they will use it. You can combine closed questions, to which the answers can be quantified, with open ones, but take care not to ask very similar questions as this may confuse the respondent.

When using scales, please avoid numeric scales as people often get the scale wrong even when it is spelled out clearly. Instead use: Not at all A little Quite a lot A lot and leave space for comments where appropriate.

On the evaluation form you should only ask for background information that you would like to correlate with responses.

| Questions to capture impact at the event | |
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| <p>Questions suitable for four tick boxes, e.g. Not at all to A lot, or Not at all to Very likely.</p> | <ul style="list-style-type: none"> • How much did you know about X before the event? And after? • Did the event provide you with new insights on...? • Did the event increase your awareness of...? • Did the event inform your views about...? • Did you find the event applicable to your work? • Do you expect that the insights of the event will change aspects of your own practice? • Have you changed your mind on X as result of the event? <p>Note the nuances between knowledge, insights and awareness and choose the wording most applicable to your event.</p> |
| <p>For small events you can stick to open questions</p> | <ul style="list-style-type: none"> • What did you learn from the event? • Did you pick up elements of good practice at the event; if so what? • Did you share good practice with other participants; if so what? • What elements of good practice discussed at the event would you like to implement in your work place? <p>The last question can be followed up after the event to see what they have been able to implement.</p> |
| Questions to capture change in behaviour a while after the event | |
| <p>You can use the same questions as above if you did not evaluate on the day.</p> <p>Additional questions suitable for tick-boxes</p> | <ul style="list-style-type: none"> • Have you discussed the event with other people /colleagues? (Yes/No) If so, how many have you discussed with? • Have you looked up more information about...? (Yes/No) • To what extent has the event changed the way you <i>consider/view</i>... • To what extent has the event changed the way you <i>do</i>... (or use verb suitable) <p>For the latter two use the scale above, and don't forget to allow space for comments.</p> |
| <p>Open questions</p> | <ul style="list-style-type: none"> • Looking back at the time after the event, have you noticed any changes to your own thinking and practice around...? • What about your colleagues/organisation's thinking and practices around...? |
| Questions to capture views about the event and how to follow-up | |
| <ul style="list-style-type: none"> • Please describe the event in three words. You can use this to create a visual representation of your guests' feedback on wordle.net • What did you like the most about the event? • What could we improve next time? • Do you have further ideas on how the event organisers can take this topic further? • Is there anything you would like to do to help take this agenda further? • We would like to follow up some of the participants with a telephone survey in a few weeks' time. If you are happy with us contacting you please leave a number we can reach you on. Alternatively, if you have their details: If you don't want to be contacted please tick this box <input type="checkbox"/> | |

This guide was produced by the CAHSS Knowledge Exchange Office. We help colleagues to engage with industry, policy and practice to maximise the impact of their research. Find out more at www.ed.ac.uk/cahss/rke

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