The PhD Hub Campaign Series Codebook

European PhD Hub

Author:

Esther Palomar (Birmingham City University, United Kingdom)

1. Introduction

The interdisciplinary teamwork approach to the organisation of the local PhD Hubs' dissemination events compiled in the European PhD Hub Campaign Series Logbook has provided us with the incentive and the resources to develop explicit guidelines for and documentation of our methods in this Codebook. As a compilation of lessons learned and for new PhD Hubs joining the network, the European PhD Hub Codebook enhances the ability to transfer the skills acquired from this project's consortium members to the other stakeholders. These skills relate to the preparation, organisation, and evaluation of the dissemination activities and are structured in the present document as follows.

2. Codebook structure

The Codebook structure includes six basic components: the name of the event, a brief definition, preparation phase, organisation phase, evaluation phase, and indicators list, which are depicted into a Canvas as follows:

Name	Preparation phase	Organisation phase
Brief description	Target groups	
	Objectives	
	Organising roles	
	Timeline	
	Communication channels	
Indicators	Budget	**Evaluation phase**
	Support and logs	

Figure 1 Event structure on a Canvas template

The formal completion of this template, so the establishment of the event plan, relies on the active involvement not only of the PhD Hub team (chair, representative of supervisors and students, and admin staff) but also the Doctoral Research College, the institutional marketing support as well as the institutional dissemination team support and Finance.

We briefly define each field of the event canvas in sections below. We also include the Event Report Template and a sample of this template on Appendix A and B respectively to assist the organisers in the establishment of a complete route for the event success.

2.1. Name of the event

Best practices point out that a good name for an event capturing the essence, purpose and target of the event is key for its success as well as to make it successfully replicable. Some tips advise to not describe, but rather stand for a big idea and the words translated into emotional appeal.

2.2. Brief definition

A number of four or five keywords should be compiled together and linked to establish in a few sentences the "what, who, how, why and when".

2.3. Preparation phase

The successful execution of the event preparation phase requires the active involvement not only of the local PhD Hub team but also the Doctoral Research College (or some representatives), institutional marketing support (staff members) as well as institutional dissemination support.

A number of 7 data fields are highlighted in the preparation phase as to be established on the canvas template; any other relevant information for preparing the event is also welcome.

- **Target groups**. Specify core and indirect audience and stakeholders to who the event is aimed at.
- **Objectives.** State clear, concrete and simple aim and objectives to be achieved.
- **Organising roles.** Define chair and key roles of contact (and institution organising) for the organisation of the event.
- **Timeline.** Draw a clear schedule of the event.
- **Communication channels.** Enumerate key channels and media for the event advertising such as email distribution, press or TV advertisement. Production of these media should start in time (about 2 months before the event) and dissemination (at least a month prior to the event).
- **Budget**. Enumerate key expense items and cost estimation.
- **Support and logs.** Quantify resources needed to hold the event (IT requirements, merchandising and HR) as well as to monitor and measure the indicators detailed on the canvas template for the event evaluation.

We would like to remark the following recommendations extracted from best practises and lesson learnt during the organisation of local/national/European PhD Hub events:

- Produce visual material advertising the event, stating the partners participating, guest speakers, the sponsors, and so on to be distributed digitally and printed.
- Advertise the event (in press, SSNN, institutional website, blogs, etc.) is key.
- State the list of indicators to be collected during and after the event.
- Consider COVID-19 countermeasures and security, and the pros and cons of the online version for the organisation of the event.
- Prepare a Plan B.

2.4. List of Indicators

The number of indicators and metrics could vary; these could be related to the event satisfaction drivers, attendee demographics, likelihood to recommend the event, favourite aspects of the event or future event preferences. Some examples follow:

- *number of attendees* from both academia and industry; a registration process generated and distributed prior to the event is useful.
- *level of satisfaction of the attendees*; an online questionnaire measuring facilities and location, IT and multimedia resources, organisation and agenda of the event, appropriateness of the communication media used, welcoming and networking facilities could be created for compiling feedback from the attendees after the event.
- *level of satisfaction of organisers*; organisers could hold a brainstorming meeting after the event as to reflect on both, the organisation issues and best practises, also to collect new ideas for the future replica of the event.
- *level of satisfaction of both academic and industrial co-supervisors* measuring the complexity allocating responsibilities, signing contracts or MoU, mentoring the student either in-situ or remotely, etc.
- *level of satisfaction of the PhD candidates* over the working conditions, mentoring support, gained skill-set relevancy, health and safety issues, financial support, intellectual/industrial property issues, etc.
- *expectation of reaching new agreements*.
- *a list of problems* that may arise during the event.

Indicate the digital location of this/these file(s) in *Support and logs (Preparation phase).* Moreover, indicate the person in charge of producing and/or compiling the data as well as the form and type of support. Refer to the **Appendix A Event Report Template**. Identifying the indicator with a label can help for crossed validation.

A table or grid such as in Table 1 could help to indicate impact factors to be extracted from both attendees and organisers.

Indicator ID	What/Description	How/ Medium	Who/In charge

Enumerator	Indicate factor and purpose	Type of document or record such as online questionnaire	Person in charge and contact details
		Type of data like number scale or qualitative criteria	

Table 1 List of Indicators

2.5. Organisation phase

Basic information to be stated for a successful organisation of the event is:

- **Chair/Responsible roles** to contact during the event.
- **Location and facilities** should be also specified on a layout map or brochure.
- **IT requirements** such as video/audio projection, number and type of screens, should be in place and tested in time.
- **Merchandising** stand to be included at the registration desk, entrance or visible location point.
- **Agenda of the event** can be disseminated online and printed on a brochure.
- **Personnel in charge of photography and video** should have a planned route.
- **Personnel in charge of compiling impact factors** and other indicators should have a planned route.

Apart from the basic resources to put in place as stated above, we would like to include some recommendations extracted from best practices:

- **On-site event**: Local PhD Hub team should really look like a team; collaboration is key and t-shirts, and other types of merchandising could be used as a dressing code within the team. The team should include a representative of the different key stakeholders within the Hub, i.e., supervisors from academia and industry partners, PhD candidates, DRC staff, PhD hub administrators, as well as key contacts from local/national funding bodies and other authorities. Moreover, invite press for coverage.

- **Online event:** In this setting, timing is the key and a clear, precise agenda is the mean. Count on an IT staff member in the team and two co-chairs of the event always online. Using a recognisable brand, such as PPT templates, the PhD Hub logo, etc., are also recommended (see PhD Hub visual guidelines).

Remark. It is essential to count on a clear process of compiling feedback from attendees and organisers, as well as having it visible and accessible for both groups. Survey! Use either online questionnaires like SurveyMonkey or on-site formularies to be completed during the event. Crowdshaping techniques such as foot traffic tracking is very useful during on-site event monitoring.

2.6. Evaluation phase

Feedback compiled during or after the event is important but useless if there is no evaluation of the data. Quantitative and qualitative feedback should be established on the Preparation phase and on the Indicators list within the event canvas.

Best practices and lesson learned from the local PhD Hub Campaign Series I (in 2019) and II (in 2020) emphasise the need of a cross validation grid such as:

Indicator ID	Value/Range/%	Observations	% achievement	Feed forward measures
Match enumerator in Table 1	Indicate value measured	Include discussion on feedback observations	Colour	Include lessons learned for future instances

Table 2. Cross validation grid of impact indicators.

A colour scale is sometime useful for speedy processing of the level of goals achievement:

Achieved	In progress	Not achieved

3. PhD Hub Event Canvas

This section expands the event structure on the canvas template presented in Figure 1.
Download the [printable version](#).

Name	PREPARATION PHASE		ORGANISATION PHASE
Brief description	Target groups	Objectives	
	Organising roles	Support and logs	
INDICATORS	Timeline		EVALUATION PHASE

INDICATORS

ID	What	How	Who

EVALUATION PHASE

ID	Value	Fback	Forward

Today   Provisions   Merchandising   Advertising
Others…… Event start

+Agenda

Generate Event branding   Build excitement   Involve attendees

Communication channels

Budget

4. Conclusions

We have described the lessons learned and best practices from the preparation, organisation and evaluation of the feedback extracted of the PhD Hub Campaign Series I and II that took place during the years 2018/2019, and 2019/2020 at the local facilities of the university and industry members of the Consortium. We have structured our findings as to generate a canvas template that aims at formalising a systematic way of preparing and organising future PhD Local Hub's events. We also wanted to include some tips and recommendations learned from the experience of the conducted activities. We include a template for event reporting as well.

We would like to remark the importance of advertising the event, as well as inviting and involving the suitable stakeholders for the success and generation of event branding, which assures, amongst other factors, the replicability of the event.

Appendix A Event Report Template

ACTIVITY

Activity name/type
Date/s
Location

ORGANISERS

Names/Affiliation
Identify clearly chair and second in charge

OVERSEEING/SUPPORT PERSONNEL

Names/Affiliation

I.   SUMMARY

Concise summary that describes the activity in general, who the activity is designed for, and what the participants should learn/get from the activity as well as what the project ultimately gets.

GOALS

Enumerated goals that specifically illustrate the objectives of the activity.

II.   ACTIVITY DETAILS AND REQUIREMENTS

TIME

Activity length

TARGET AUDIENCE

Describe core and indirect target groups

CAPACITY

Maximum number of participants

FACILITATORS

Number of facilitators needed

COST

Cost of putting the activity together (including materials)

FACILITIES

Bldg./Rm.#	Room Name	Contact	Purpose

Note: Facilities should be reserved at least 2 weeks in advance. Include catering/coffee/buffet to be ordered.

EQUIPMENT AND MATERIALS

Item	Contact	Description
Include hardware, software, and any other materials such as merchandising, hand-outs or uniforms.		

III.   IMPACT FACTORS

Identify the set of indicators that affect the success of the activity as well as the satisfaction of both participants and organisers and should be measured and evaluated.

Indicators may include number of expositors, attendees, administration and management staff members; facilities and location, IT support, marketing support, school/Faculty support, supervision team support, multimedia resources, communication media used and interest in the information disseminated, welcoming and networking facilities, layout and desks organisation, health and safety, etc.

IMPACT FACTORS

ID	Factor	Data type/Value range	Medium	In charge
1				
2				

...				

IV.   TIME SCHEDULE AND PROCEDURE

The following issues should be discussed in detail so that someone who has never seen the activity, but who has an adequate background, can follow the directions and successfully prepare for and facilitate an activity.

Preparation

One-two months before the activity:
- · Who is chairing/co-chairing the event?
- · How are participants notified or recruited?
- · Who must be contacted to ensure that your activity is a part of the project and activity dates/times are adequate.
- · How is the activity being advertised?
- · Do posters/advertisements need to be made?
- · Do merchandising items and/or uniforms need to be ordered? T-shirts are good idea
- · Do facilitators need to be recruited?

COMMUNICATION CHANNELS

Medium	Author	Recipients	Purpose	Deadline

Note: Communication media should be released at least 4 weeks in advance.

Two weeks before the activity:
- · Start meeting with the facilitators to ensure that they understand their role and preparation tasks are evenly distributed.
- · A run-through of the actual activity with the overseeing personnel and all facilitators should be scheduled.
- · Should any rooms, labs and/or IT materials be reserved?
- · What software should be installed?
- · How is the activity monitored?
- · Do formularies/questionnaires need to be generated?

SUPPORT AND LOGS

Support/Log	In charge	Medium/Format	Location
Include attendance list, registration template, questionnaires, and any other materials such as file repository, video recording, photographer. etc.			

Arrival

On participants' arrival, what should be done?

Activity Presentation

How is the activity described to the participants?

Activity

What?

Departure

Where do participants go after the activity is over? Transportation?

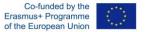**After the Activity is Over**

Clean-up? Activity evaluation.

V.   EVALUATION AND REFERENCES

HIGHLIGHTS

·   Describe the activity's successes.
·   Summary of the impact indicators.

Factor ID	Factor	Value/Range/ %	Source	Contact
	Number of Organisers			
	Number of Participants			
	Number of Expositors			
	Number of Candidates			
	…			
Satisfaction rates with:				

	Location			
	Facilities			
	Marketing support			
	Materials			
	IT support			
	Multimedia resources			
	School/Faculty support			
	Admin support			
	Supervision team support			
	Communication media			
	Welcoming			
	Networking facilities			
	Layout organisation			
	Health and safety			
	Speakers' suitability			
	Session Schedule/ Agenda			
	Breaks and catering			
	…			

PITFALLS AND SOLUTIONS

·   What problems were encountered and how did you work to solve them?

PROCESSING

·   What should be improved?

·   What should be done differently next time?

REFERENCES

Contact points and/or works cited.

Appendix B Event Report Example

ACTIVITY

Activity name/type   MyResearch4Industry 2019
Date/s 30th -31st May 2019
Location   BCU. Millennium Point Building Birmingham

ORGANISERS

Names/Affiliation Rehan Bhana/ Esther Palomar/ **Syed Naqvi** (BCU)
Identify clearly chair and second in charge

OVERSEEING/SUPPORT PERSONNEL

Names/Affiliation
Waldo Cervantes (Pitch Workshop)/BCU
Beverley Cole (judge)/BCU
Kanishka Weermunda (judge)/

I.

SUMMARY

MyResearch4Industry 2019 event is shaped as a pitch contest offering the Research students five to seven minutes to present a compelling oration on the significance of their research. Together with scientific and technical quality, this activity tends to promote their transversal skills such as oral and presentation skills; also, this will give wider visibility to their work. A jury composed of industry and academic experts will evaluate their pitch deck and will award the prizes below to support the students' projects.

GOALS

Enumerated goals that specifically illustrate the objectives of the activity.
· Help students to improve oral skills and get confidence in their research work.
· Extend visibility of the research conducted at the Faculty.
· Networking and synergies opportunities.

II.   ACTIVITY DETAILS AND REQUIREMENTS

TIME

Activity length 2 hours

TARGET AUDIENCE

Describe core and indirect target groups
PhD candidates   /academics and industry partners

CAPACITY

Maximum number of participants 15 students

FACILITATORS

Number of facilitators needed One chairman/ 2-5 judges or examiners

COST

Cost of putting the activity together (including materials)
2 hours of senior (3-8) academics/partners
No need of rental this time
Recording/photographer

FACILITIES

Bldg./Rm.#	Room Name	Contact	Purpose
MP	Hall GND level		

Note: Facilities should be reserved at least 2 weeks in advance. Include catering/coffee/buffet to be ordered.

EQUIPMENT AND MATERIALS

Item	Contact	Description
Include hardware, software, and any other materials such as merchandising, hand-outs or uniforms.		
Big Screen and laptop	IT Support	Screen connected to laptop

III.   IMPACT FACTORS

Identify the set of indicators that affect the success of the activity as well as the satisfaction of both participants and organisers and should be measured and evaluated.
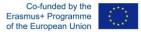
Indicators may include number of expositors, attendees, administration and management staff members; facilities and location, IT support, marketing support, school/Faculty support, supervision team support, multimedia resources, communication media used and interest in the information disseminated, welcoming and networking facilities, layout and desks organisation, health and safety, etc.

IMPACT FACTORS

ID	Factor	Data type/Value range	Medium	In charge
1	Type of participation	PhD student, MSc student, BSc student, PhD Student presenting, Jury member, Industry, Academic staff, other	Questionnaire	
2	Suitability of Agenda	Activity programme was accessible on time, printed or visible during the event, with timing and location clear, with appropriate duration.	Questionnaire	
3	Suitability of IT	Appropriate audio-visual material	Questionnaire	
4	Suitability of Location and facilities	Place was confortable and according to the expected audience	Questionnaire	
5	Suitability of communication material	Information about the event reached participants on time and clearly media, printed/digital brochure was available	Questionnaire	
6	Suitability of event organization	Timely and relevant information about the registration to the event, scheduled agenda and other processes and steps were communicated	Questionnaire	
7	Did you have fun?	Yes/no	Questionnaire	
8	Comments		Questionnaire	

IV. TIME SCHEDULE AND PROCEDURES

The following issues should be discussed in detail so that someone who has never seen the activity, but who has an adequate background, can follow the directions and successfully prepare for and facilitate an activity.

Preparation

One-two months before the activity:
· Who is chairing/co-chairing the event? Dr Syed
· How are participants notified or recruited? Email
· Who must be contacted to ensure that your activity is a part of the project and activity dates/times are adequate.
· How is the activity being advertised? Email
· Do posters/advertisements need to be made? Digital advertisement on university website is desirable
· Do merchandising items and/or uniforms need to be ordered? T-shirts are good idea
· Do facilitators need to be recruited? E-mail possible individuals and describe the purposes of the program and ask if they are interested in participating.
Judges need to be identified, contacted and confirmed.

COMMUNICATION CHANNELS

Medium	Author	Recipients	Purpose	Deadline
Email	Dr	PhD candidates Academics	Registration to the event	Sent 24 days before the event
BCU Website				

Note: Communication media should be released at least 4 weeks in advance.

Dear MSc Student,

*The Innovation Fest is a showcase of creative talent from the Faculty of CEBE at BCU allowing our students to engage in enterprise and develop themselves as future innovators. The **2019 Innovation Festival** takes place on 29th to 31st May at Millennium Point and is inviting MSc Project students to participate in a new interactive activity under the umbrella of the European/Birmingham PhD Hub.*

***MyResearch4Industry** contest will offer the Research students five to seven minutes to present a compelling oration on the significance of their research. Together with scientific and technical quality, this activity tends to promote their transversal skills such as oral and presentation skills; also this will give wider visibility to their work. A jury composed of industry and academic experts will evaluate their pitch deck and will award the **prizes** below to support the Research students projects for industry:*

1. Top Winner £1000
2. Runner Up £500
3. £250 voucher
4. £150 voucher
5. £100 voucher

*Top 5 will get support and development through Birmingham PhD Hub to innovate their work for **European Innovation Fest 2020** event to be held in Madrid. Moreover, all participants will get an **Approved PhD Hub Certificate**.*

*If you want to participate, you just have to follow these **rules** for competition:*

Eligibility: Every participant is required to submit to template@bcu.ac.uk , brief summary (maximum 500 words in a word document file by 17th May 2019) which may include i) name and affiliation(s), ii) problem statement, iii) idea(s) investigated and project goal(s), iv) potential impact, v) state of the art on the subject and iv) organization/agenda of the pitch presentation.

Day 1 (May 30th 2019)
A multimedia podium will be provided for participants to display 5-7 presentation slides and speech to the jury and wider audience attending the Innovation Fest 2019.
A jury composed of industry and academic experts will evaluate the presentation.
A minimum of 3 jury members will evaluate each pitch. The jury members will be chosen according to their interest. This assessment will provide an initial ranking.
The jury will evaluate the following key aspects: 1) clarity on value of research, 2) communication comprehension, 2) engagement and communication.

Day 2 (May 31st 2019)
Morning: A shortlist of 5 pitch presentations will compete for best prizes.
Afternoon: Playoffs will rank top 2 pitch presentations that will head on during the Innovation Fest - Awards ceremony.

Contact: template@bcu.ac.uk

Agenda:

Dear PhD Candidates,

Thanks for submitting your expression of Interest for MyResarch4Industry Activity. Following are the details of this event:

Day 1:
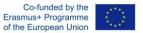*Date: Thursday 30 May 2019*
Time: 11 AM
Venue: Connect meeting room (next to 6/8 Café)
Notes: Panel will select 5 top pitches for the first session of Day 2.

Day 2:

Date: Friday 31 May 2019
First session:
    Time: 10 AM
    Venue: Connect meeting room (next to 6/8 Café)
    Notes: Panel will select 2 best pitches for the final session.

Final session:
    Time: 3 PM
    Venue: Auditorium (former Giant Screen Cinema)
     Notes: Grand final.

There will be a good number of student volunteers who will be happy to help you out in finding the event venue.

*Please note that our colleague Dr. Waldo Cervantes is running a **preparatory session** tomorrow (Wednesday) to help students finalise their pitches with some tips and good practices. Following are the details:*

Date: Wednesday 29 May 2019
Time: 1:30 PM to 4:30 PM
Venue: Room MP203
Workshop: Fine tune you pitch by receiving advise from BCU academics.
Contents:
-What makes an idea "successful"
-What do investors look for?
-Revisiting the business canvas
-What to do and what not to do during a business pitch.
-Strategies for overcoming "stage-fright"

Please take advantage of this opportunity to further improve your pitches.

Notification to winners:

Dear Student,

*On behalf of the panel of judges, I am pleased to inform you that you are selected for the final round of MyResearch4Industry activity. **Congratulations** for making your place in the next round. Please send your slides for the final round to Jane Doe jane.doe@bcu.ac.uk before 2 PM.*

We look forward to seeing you this afternoon in the Auditorium (Big Cinema). Please be relaxed for the final round. The panel and the audience will be there to support you.

Best wishes,

Notification to not-winners

Dear Student,

On behalf of the panel of judges, I would like to thank you for your active participation today in the first/second round of MyResearch4Industry activity. Unfortunately, you could not make it to the final round this time. Please feel free to let me know if you would like to have detailed comments from the panel about your pitch.

You are more than welcome to attend the final rounds of MyResearch4Industry activity this afternoon in the Auditorium (Giant Cinema).

Best wishes,

Two weeks before the activity:
- Start meeting with the facilitators to ensure that they understand their role and preparation tasks are evenly distributed.

Contacting judges and agreeing on marking criteria and procedure
- A run-through of the actual activity with the overseeing personnel and all facilitators should be scheduled.
- Should any rooms, labs and/or IT materials be reserved?

Book big screen and laptop
- What software should be installed?
- How is the activity monitored?

Chairman keeps track of judges' marking and round's winners

Photographer gets pictures of speakers, judges and the audience.
- Do formularies/questionnaires need to be generated?

Yes, to get feedback from the chairman, participants, judges and audience.

SUPPORT AND LOGS

Support/Log	In charge	Medium/Format	Location
Include attendance list, registration template, questionnaires, and any other materials such as file repository, video recording, photographer. etc.			
Registration + 500 words summary	Dr	Email response to invitation	
Attendance list	---		

The list of students:

Name	Email	Remarks
		Winner
		Runner-up
		3rd place
		4th place
		5th place
		Round 1
		Round 1
		Round 1
		No show
		Withdraw

Two judges for the 2 rounds: Beverley Cole (BCU) and Kanishka Weermunda

Chairman: Dr Syed Naqvi

Arrival

On participants' arrival, what should be done?
Duration: 15' before start participants load slides/videos/any material for their pitches

Activity Presentation

How is the activity described to the participants?
Duration: 5' introductory talk to audience about the activity, expected outcome and impact
Handout: If applicable.

Activity

What?
Duration: 5' per participant
Handout: If applicable.

Departure

Where do participants go after the activity is over? Transportation?
        Duration: Award ceremony (2nd day of Innovation Fest) + closing bbq

After the Activity is Over

Clean-up? Activity evaluation?
Judges transmit their votes and chair transmits winners communications
Send questionnaire to participants to learn from feedback.

V.   EVALUATION AND REFERENCES

HIGHLIGHTS

·   Describe the activity's successes.
·   Summary of the impact indicators **Questionnaire to be completed (by Dec 2019)**

ID	Factor	Value/Range/ %	Source
1	Number of Organisers		
2	Number of Participants		Registration
3	Number of Expositors		Organiser
4	Number of Students		Organiser
Satisfaction rates with:			
	Location		Online questionnaire
	Facilities		
	Marketing support		
	Materials		
	IT support		
	Multimedia resources		

	School/Faculty support		
	Admin support		
	Supervision team support		
	Communication media		
	Welcoming		
	Networking facilities		
	Layout organisation		
	Health and safety		
	Speakers' suitability		
	Session Schedule/ Agenda		
	Breaks and catering		
	…		