

How to link standardization with research projects



Tips for organizing
an event for researchers



Contents

Introduction	4
1 Getting started	5
2 Defining your message, developing the agenda and identifying speakers.....	6
3 Promoting the event	10
4 Logistics and practical issues.....	12
5 Evaluation and follow-up	13
Annex: Target groups	14

Introduction

The organization of an event to reach out to the research and innovation communities covers different aspects from finding the title best suited for the purpose to considering logistical aspects, such as registration, promotion and documentation of the event. All these aspects are covered in the present document which has been developed from the experiences of a number of CEN and CENELEC members in organizing national events (e.g. conferences, workshops) addressing the research and innovation communities. The objective of these national events was to link research and innovation with standardization; with the messages of the Integrated Approach¹ at the core.

These events were evaluated by participants and the organizing national standards bodies (NSBs) or national committees (NCs) with regard to both their content and organization, from which this set of recommendations has been drawn.

In a separate exercise, the needs of the research and innovation communities have been presented in a research study² showing the benefits of linking innovation and standardization. The results of this research have been analysed together with feedback from the various national events to show how a NSB/NC can meet a number of these needs by organizing events to link standardization with innovation and research.

This document contains many references to an Advice document³ on how to link standardization and research. This document provides advice for NSBs and NCs that want to increase their interaction with the research community and participate in research projects.

Whilst this document provides recommendations for hosting national events for the research and innovation community, the information included is to be seen as general recommendations that may not be applicable in all cases.

¹ The Integrated Approach: <http://www.cencenelec.eu/research/Pages/default.aspx>

² Research study showing the benefits of linking innovation and standardization: <http://www.cencenelec.eu/go/Bridgit/innovationstudy>

³ Advice document "How to link standardization and research": <http://www.cencenelec.eu/go/Bridgit/membersguide>

1 Getting started

Checklist for getting started

Several issues should be addressed before organizing an event. It should fit with the strategy and the objectives of your NSB/NC. Consult the Advice document⁴ (Chapter 2) for details on how to determine your strategy and objectives. The checklist in box 1 can be helpful to get started.

Box 1: Start-up checklist

- Why, for whom and for what purpose do you want to organize the event? Define your objectives concerning the event. Consider the message of the event, which should be clear and well-described (see Chapter 3 for a collection of potential messages)
- Choose a format for the event that best matches your message and the needs of the target group that you want to reach, e.g. conference with a plenary meeting and breakout sessions, workshop, seminar, web conference, world café™
 - Plan a conference if you want to reach a large number of people and give information on topics rather than engage in detailed discussions
 - Plan a workshop if you would like to interact with the audience in a direct and intense way
- Define the size of the audience (be realistic about capacity, possibilities etc.) and the target groups to reach out to (see Annex for examples)
- Consider cooperation with relevant partners (e.g. ministries, research organizations, universities)

Organizational issues

Box 2: Internal organization

- Appoint a person responsible for organizing the event
- List who within your organization should be informed and at what time during the planning (top management and communications department should always be informed)
- Define time, staff and financial resources available (e.g. staff to handle preparation and implementation, logistical aspects, contact with potential speakers)

Items to consider when setting a date

Box 3: Setting a date

- Check if the date is convenient for your target audience (no other events of relevance taking place at the same time)
- If you are working with a co-organizer, can you find a date that works for both of you?
- Consider combining your event with another event or timing it to fit around other relevant research workshops/conferences
- Consult the announcement schedule for Horizon 2020 calls (or for any other research or innovation funding-programme of interest to you) to link your message to the potential needs of your target group(s)

It can be useful to make a plan which includes deadlines of and responsibilities for all organizational issues. An example of a checklist⁵ is available online in an Excel format.

⁴ Advice document: <http://www.cencenelec.eu/go/Bridgit/membersguide>

⁵ General checklist for organizing an event: <http://www.cencenelec.eu/go/Bridgit/webpage>

2 Defining your message, developing the agenda and identifying speakers

Message

Deciding on the message for your event is central to attracting your target group(s) (see Annex) and relevant speakers. This should be decided when you start organizing your event.

Box 4: Focus of the event

- Consider whether it is appropriate to have a thematic focus, e.g. on a specific target group you would like to attract, or to have a more generic event, e.g. to reach as many researchers as possible
- You might find it useful to balance the pros and cons around a thematic or a generic focus
 - Thematic: smaller audience, but need for a more focused presentation
 - Generic: larger audience, less need for focused presentations to encompass different expectations, but risk that some might not appreciate the relevance to their specific issues

Depending on your target group(s), you might wish to use any of the following suggestions to define your own message. However, take care to be clear and avoid mixing messages as this might confuse the target audience.

Box 5: Messages for an event with a close link to Horizon 2020 (or any other research framework of specific interest to your NSB/NC)

- Learn how standardization is included in calls, how integrating standardization can be a “value-adding” aspect to your proposal, and how proposals are evaluated
- Discover how your project can link with standardization and how to use standards to support knowledge transfer and to disseminate project results
- Find out how standardization links to your specific topic
- Learn how standards can support innovation and the role they play in the different stages of a research project
- Listen to the experiences of other research projects who have already “integrated” standardization

Box 6: Messages on the link between standardization and research for an event (generic approach)

- Discover the relevance of standards to your research institution and your initiative
- Find out the links between standardization and your specific topic
- Learn how standards can support innovation and which role they play in the different stages of a research project
- Understand more about the interplay between standards and IPR issues
- Hear about the collaborative nature of standardization and the advantages it brings, and the way that standardization facilitates networking with enterprises, trade organizations, consumers, academics and other stakeholders

Title of the event

When you choose a title for your event, aim for something that:

- is attractive and clear about the objective of the event
- will resonate with the research and innovation community

Examples: “Standards: the bridge to innovation”, “Standardization in Horizon 2020”, “Integration of standardization in research and innovation”, “Transfer your research to the market.”

Agenda and speakers

To attract your audience it is essential that you:

- create a well-structured agenda with a duration that seems appropriate for the event
- select competent and charismatic speakers who support the message you want to bring across

An agenda for your event could use any or all of the items in box 7 and table 1, depending on your message and the availability of speakers on a given date. The sequence of the items should be adapted based on your preferences, the perceived needs of the audience and the format chosen. To make sure that the message about standardization is better understood and accepted by the audience, it can be a good idea to invite other people, rather than staff from your NSB/NC, to talk about standardization.

Box 7: Speakers, your role in the event and creating a collaborative atmosphere

- Invite policymakers to present their view on how standardization supports innovation and research
- Involve selected members of the research and innovation community as speakers
 - Have them present their perspective on the link between standardization and research
 - Have them present project(s) where they used standardization, how they did it, and what the results were
 - Invite a presentation from a project to show how the project outcome has resulted in successful products or services for the market
- Invite members of industry or representatives from trade organizations to present relevant examples of how linking research and standardization has resulted in success for their business
- Demonstrate your competence as NSB/NC in linking standardization and research
 - Present the services you provide to research and research projects
 - Give examples of successful interaction between your NSB/NC and research and how this was achieved (case studies, best practices)
 - Do not give too many details about standardization and its processes, as this might overwhelm the audience and turn their attention to information that they might not really need at that specific time
- During the event, facilitate collaboration and interaction within your audience through interactive methods (e.g. world café™, breakout sessions, workshops)
- Allow sufficient time for informal meetings and communication among participants, including representatives of your NSB/NC

An example of an agenda for a one-day event is shown in table 1. Examples of actual agendas of events⁶ are also available online.

⁶ Examples of agendas of national events: <http://www.cencenelec.eu/go/Bridgit/webpage>

TABLE 1: AGENDA FOR A ONE-DAY EVENT

Suggestions for speakers	Recommended main messages
Opening	
<ul style="list-style-type: none"> - Representative of national authority - High level NSB/NC representative 	<ul style="list-style-type: none"> - Welcome - Relevance of research and innovation - Commitment of the NSB/NC, authority, etc.
Standardization, research and innovation	
<ul style="list-style-type: none"> - NSB/NC representative 	<ul style="list-style-type: none"> - Why standardization supports research and innovation (compatibility, dissemination, market acceptance) - Role in framework programmes, Horizon 2020 pillars, national level - Generic overview of standardization (what is it, type of documents, how they are developed)
Practicalities for including standardization in a project	
<ul style="list-style-type: none"> - NSB/NC representative 	<ul style="list-style-type: none"> - Participation of researchers in TCs - Integration of standardization activities in research projects - Focus on ongoing Horizon 2020 calls and standardization references - Collaboration with the NSB/NC in different stages of drafting the proposal - Possible standardization activities to be included in a project - Possible modes of participation (partner, subcontractor, advisor) - Contact points
Support tools for researchers	
<ul style="list-style-type: none"> - NSB/NC representative 	<ul style="list-style-type: none"> - Presentation of the website (national, CEN-CENELEC)
Success stories	
<ul style="list-style-type: none"> - Coordinators of research projects that include standardization - NSB/NC representative 	<ul style="list-style-type: none"> - Brief presentation of the projects - Role/importance of standardization in the projects - Experiences with standardization and the standardization body - Positive effect in the proposal evaluation
External experience	
<ul style="list-style-type: none"> - National Contact Point - Authorities - EC representative 	<ul style="list-style-type: none"> - Confirmation of the relevance of standardization in projects from the experience of the National Contact Points - Examples, data from H2020 calls - Recommendations to researchers
Discussion, questions	
<ul style="list-style-type: none"> - Moderator from NSB/NC 	<ul style="list-style-type: none"> - Discussion and questions on items touched by the event agenda - Feedback on support tools for researchers - Feedback from participants concerning their needs, doubts, expectations
Closure	
<ul style="list-style-type: none"> - High level NSB/NC representative - Representative from national authority 	<ul style="list-style-type: none"> - Conclusions, highlights, final message

⁷ Tools for researchers on CEN-CENELEC web-site: <http://www.cencenelec.eu/research/tools/Pages/default.aspx>



Having selected your speakers, attract them with the information presented in box 8.

Box 8: Information to attract speakers

- The overall goal and objectives of the event
- The relevance of their presence and presentation/contribution
- Details of other speakers
- An overview of the agenda, even if still a draft

Speakers, having confirmed their availability, should be provided with essential information on what is expected from them.

Box 9: Briefing speakers on their contribution

- The purpose of their presentation/contribution to the event
- The focus of their presentation/contribution
- Format, number of slides/pages, duration, and information on whether you plan to provide event proceedings to your audience

Request your speakers to deliver a first draft of their presentations well ahead in time so that you can check and make suggestions on content and messages; also check that the presentation will fit into your schedule.

3 Promoting the event

General

Properly promoting your event will make sure that you have the number of participants you would like to have. Consult the Advice document⁸ (Chapter 3) for details on how to engage your stakeholders.

Invitations

Invitations can be directed to individuals by name, but most probably, you will send invitations to target groups that share a need for information on the link between standardization and research. Try to inform your target groups well ahead of time. You may wish to make a “save-the-date” announcement if you have not yet finalized the agenda for your event. Allow for “early registration” to see whether your event has a good rate of registrations from researchers. This will make it easier to target any subsequent reminders and additional promotion of the event.

Box 10: Good practice for inviting target groups to your event

- Decide the type of stakeholders you wish to invite depending on the event’s objectives
- Clearly describe the format of the event you are offering (e.g. workshop, conference, seminar) so that the invitees know what to expect
- Clearly describe the goals of your event which should be based on the messages you have developed for your event (see boxes 4–6)
- If available, circulate the agenda of the event

Media and channels for promoting your event

Select the most appropriate media and channels to inform your target groups about your event.

Box 11: Examples of media and channels for event invitations

- Direct mailing
- Announcement on your webpage
- Your magazines, newsletters, etc.
- Any social media your organization uses (e.g. Linked-in, Twitter)
- Press contacts (your organization can place press releases or announcements of your event)
- CEN-CENELEC webpage for research and innovation events

⁸ Advice document: <http://www.cencenelec.eu/go/Bridgit/membersguide>

Multipliers within the research and innovation communities

Consider how you can make use of “multipliers”, i.e. third parties who have their own channels and media (e.g. webpages, mailing lists, newsletters) and who can share information with an audience that you otherwise might not be able to reach.

Box 12: Examples of multipliers

- National authorities
- National Contact Points for research and innovation
- Professional institutions, sectoral organizations, SME associations or clusters
- Technology platforms or clusters
- Research centres or groups
- Large companies and groups of companies
- Universities or university clusters
- Members of your national TCs

4 Logistics and practical issues

Event location

When planning an event for the research and innovation community you should choose a location that meets your objectives for setting the scene. You may choose a location to suit your own practicalities (e.g. your own facilities) or for strategic reasons (i.e. reaching important stakeholders, e.g. universities, research sites, ministries).

Box 13: Choosing the location

- Book an event location corresponding to the type and size of your event
- Find a convenient location for your audience (e.g. easy to reach from the airport, by train, by car)
- Ensure that you have access to any sound and image equipment that you may need
- Consider additional spaces you might need (e.g. for registration, catering, exhibition, breakout areas)

Participants' materials

Consider making materials available to allow participants to take important information away. This can also give them the opportunity to share information with colleagues and others. A database with relevant material from different NSBs/NCs⁹ is available online.

Box 14: Examples of material that might be provided in different formats

- Agenda
- List of participants
- Proceedings and presentations
- Flyers or brochures
- Information on current research projects (e.g. project posters, project flyers)
- Horizon 2020 brochure
- Information on contact points within your NSB/NC for further questions
- Other giveaway items, such as pens or lanyards with your logo, or a USB stick with your logo containing electronic brochures and presentations

Registration and confirmation

Participants should be able to register easily. Make sure that registrations are confirmed (e.g. by email).

It is good practice to send out a reminder of the event to registered participants a few days before the event, including the final agenda.

On-site registration of participants

Depending on the format of your event, you should consider having badges ready to distribute to participants to facilitate networking among them.

Other issues

- Make sure that staff from your organization are available during breaks for questions and that staff circulate among guests.
- Consider whether you want to organize the event as a one-off, or if it is to be part of a series. (Many participants at previous national awareness events have indicated that they would recommend the event to others.)

⁹Database with relevant material: <http://www.cencenelec.eu/research/ForMembers/UsefulExamples/Pages/default.aspx>

5 Evaluation and follow-up

Evaluation

You should encourage participants to provide their feedback on the event. You can use the templates for evaluation¹⁰ provided online as reference.

Box 15: Evaluation possibilities

- Prepare a set of questions to ask during the event to provide you with feedback during the event itself
- Distribute an evaluation form for the participants to complete after the event and incentivize the participants to return the form (e.g. in exchange for a USB-stick with materials)

Follow- up actions

Consider what actions you might undertake following the event to ensure that you do not lose any momentum created by your event.

Box 16: Follow-up examples

- Provide contact details for your NSB/NC or for specific individuals responsible for research projects
- Use evaluations to help locate important stakeholders or to focus on those who would like to receive further information about the topic of the event
- When requested provide participants with additional information (e.g. details of any other events that could be interesting)
- Consider how you can keep in touch with participants who might be of interest for future collaboration

You may also consider organizing a follow-up event. Here you can use the evaluation to define the scope of your next event and perhaps even tap into participants' networks if they have stated that they would recommend your event to others.

¹⁰Templates for evaluation: <http://www.cencenelec.eu/go/Bridgit/webpage>

Annex: Target groups

When defining your target groups, you may use the table below, which categorizes research and innovation stakeholders.

TABLE A1: TARGET GROUPS

Group	Possible subgroups (public and private)
Researchers	Universities
	Research institutes/organizations
	Research departments of companies
	State/federal/regional/local (research) institutes
	Industrial research (including SMEs)
	Research clusters and their managers (e.g. research/science/business parks, technology clusters)
	Research Infrastructures (e.g. EC, ESFRI, GEANT, CERN)
	Individual researchers
Decision makers	State/federal/regional/local authorities
	Individual agencies
	Project Management Organizations
Intermediate partners	National Contact Points (NCPs)
	Academies of Science
	Multipliers (e.g. professional associations)
	Consulting firms (e.g. to handle proposals)
Networks and associations - targeting the national members	Industrial research associations
	European Technology Platforms (ETP)
	Joint Technology Initiatives
	Members of Horizon 2020 Advisory Groups
	Innovation Communities (e.g. European Institute of Innovation & Technology)
	Research networks for specific domains (e.g. social sciences, food security)
	Research societies (e.g. Council for European Studies, Association for European Operational Research)
Individuals	Representatives from scientific magazines; individuals with significant market influence though not active anymore
Internal target groups	e.g. Advisory Boards, Technical Committees and other technical bodies

NOTE Most of the examples given are at the European level; NSBs/NCs will also need to work with corresponding national bodies.

For researchers you may need to make a further distinction between basic research, applied research and innovation research in order to address specific aspects of Horizon 2020 (such as the different “pillars” of Horizon 2020: scientific excellence, industrial leadership and societal challenges).

When looking at the target group, you might also consider explicitly inviting people in positions relevant to your event, such as:

- Research and innovation directors
- (National, European) research and innovation projects/programmes coordinators
- Researchers
- Consultants, proposal writers and consortia facilitators



The content of this brochure has been produced by the BRIDGIT project. BRIDGIT ran from January 2013 to March 2015 and was co-funded by the European Commission and EFTA. The consortium of BRIDGIT consisted of AENOR (Spain), AFNOR (France), ASRO (Romania), BSI (United Kingdom), DIN (Germany), DKE (Germany), DS (Denmark), NEN (Netherlands), SN (Norway), as well as the CEN-CENELEC Management Centre; with DIN acting as project coordinator.

