



Designing Inclusive Scholarly Events that Foster Relationships and Engagement Across Silos

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Student Experience Research Network (SERN; formerly Mindset Scholars Network) worked from 2015 to 2023 to cultivate and bring greater attention to research on how structures (i.e., practices, policies, and norms) shape students' experience of respect as valued people and thinkers in school. In partnership with a community of 42 researcher members ("SERN scholars") and over 500 actors across research, practice, policy, and philanthropy, SERN bridged long-standing silos to build and mobilize practically relevant research knowledge. This document was developed as part of SERN's strategic sunset in 2023 with the intention of sharing lessons from our work that we believe will be useful to others in the field.

This document is designed for research entities and research funders interested in supporting or planning events that serve as inclusive learning spaces for researchers and other education sector partners operating across silos (e.g., across different scholarly disciplines, different methodological approaches, research and policy, research and practice). At their core, the inclusive learning spaces that SERN designed had a goal of fostering generative relationships and discussions.

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EXAMPLES AND RESOURCES LINKED IN THIS BRIEF

- Annotated [SERN annual scholarly convening agenda](#), including external and internal objectives and guide to introductory activity to build connections
- [Presenter instructions](#), annotated [session guide](#), and optional [slide template](#) for lightning talks at SERN's annual scholarly convening
- Annotated [session plan for small group breakout discussions of lightning talks](#) from SERN's annual scholarly convening
- Internal [workplan \[Excel file\]](#) for SERN's annual scholarly convening
- Internal [event debrief form](#) used by SERN staff
- [Blog post](#) describing a session on practice-responsive research at SERN's annual scholarly convening
- [Panel questions](#) from sessions at scholarly events involving funders

The principles, takeaways, and examples shared below are informed by seven years of planning annual scholarly convenings of SERN scholars, which were also attended by researchers from partner organizations, early career scholars, and leaders from policy and practice organizations. In the last four years, attendance at the annual scholarly convenings has ranged from 40-60 attendees. At in-person events, SERN paid the full cost of meeting attendance (e.g., flight, hotel, meals, materials) for all attendees and did not charge a registration or attendance fee, which helped to remove a common financial barrier for conference attendance, especially for early career scholars.

While SERN's annual scholarly convenings included attendees from outside of academia, the central focus was on the latest scholarship on student experience. The sessions leveraged elements of traditional scholarly events, including methods workshops, opportunities to share in-progress research, and research talks.

According to participants, the events emphasized relationship-building more heavily than traditional scholarly events, leading to deep engagement, generative discussions, and post-event collaboration among attendees. This feedback affirms that a relationship-centered approach is a critical lever for enhancing the impact of events, especially when engaging actors who are often siloed.

We used the following guiding principles to plan and execute SERN's annual scholarly convenings. Below, we share insights, strategies, and examples related to each principle.

1. **Start with clear and specific objectives for the event.**
2. **Choose an event theme that is dynamic and inclusive of all attendees.**
3. **Design programming that reflects the event objectives, theme, and fosters connection and learning.**
4. **Use meeting structures to set the tone for the event and build relationships, generative dialogue, and community.**
5. **Be intentional in identifying event participants and preparing them to engage across silos.**

1. What needs to be reflected in the event objectives?

Set a specific vision for what you hope to accomplish with attendees, focusing on both substantive topics and relational elements. For SERN's annual scholarly convenings, our aims included exposing attendees to the latest research on student experience, creating a venue for SERN scholars and other attendees to build on their interdisciplinary knowledge and foster application of this learning, building and strengthening community to foster equitable participation and grow professional networks of participants, and engaging in generative dialogue across silos (e.g., disciplinary, methodological, content area, sector perspective).

By getting clear about this vision, we could then backwards map to develop objectives for each event and programming that was aligned with those objectives. For example, an objective to build and strengthen relationships among community members necessitates structured time in the agenda both within and across individual sessions for community-building. An objective focused on fostering generative dialogue across disciplines and methodological perspectives requires programming that scaffolds meaningful and respectful cross-disciplinary engagement. Since many of the same people attended SERN's annual scholarly convenings year over year, we also considered the broader arc of learning and programming that would help realize our articulated vision over time.

Differentiate objectives to reflect attendee and organizational needs and goals. We often developed external-facing and internal-facing objectives as part of our planning. For example, in the annual scholarly convening that followed our strategic planning process, we developed an internal-facing objective focused on building understanding of the new strategic plan and its implications for SERN's work going forward (see an [example convening agenda](#) with internal- and external-facing objectives).

Gather feedback to enable continuous improvement. SERN surveyed attendees after events to learn about their experiences and assess the extent to which we accomplished our objectives. We also held internal debriefs to discuss what went well and what could be improved in the future (see an [example event debrief form](#) that SERN staff filled out and discussed together.)

2. What event theme will be dynamic and inclusive of all attendees?

Address attendees' diverse interests. SERN staff invested significant time identifying an annual scholarly convening theme that would speak to a diverse group of attendees who spanned different disciplines, methods, research interests, and career stages, and increasingly included leaders from outside of academia (e.g., policy and practice organizations) to ensure all attendees had a "hook" that would allow them to feel represented and be engaged in the event.

Pressure test the theme with different audiences. The work of developing and pressure testing the theme helped to create a coherent container for the event and provide on-ramps for attendees across their varying perspectives. We would often approach pressure testing in two phases, with an initial phase to gather information from SERN scholars (e.g., through a survey, through one-on-one conversations) about what topics were top of mind for them and a subsequent phase to pressure test ideas generated through the initial information gathering process. In this subsequent phase, we would bring a handful of "sacrificial" themes and ideas for aligned speakers, topics, and meeting structures to provide some starter dough for conversations and allow us to pressure test specific language and see what did and did not resonate ([download an example workplan for the SERN](#)

[annual scholarly convening](#), which outlines our process for theme development and overall event planning and execution).

To pressure test an event theme, seek feedback from attendees with different disciplinary and methodological approaches to ensure the theme resonates with their interests as well as pushes their thinking in new directions.

Aim for a theme that is specific yet inclusive. The convening theme needed to be broad enough to speak to the diverse perspectives represented at the event, yet specific enough to feel compelling. Part of pressure testing included seeking feedback from attendees with different disciplinary and methodological approaches to ensure the theme would resonate with attendees' interests as well as push their thinking in new directions.

For example, the convening theme in 2020 was "Visions for Practice-Responsive Research," which offered a unifying container for a range of programming. In a [panel conversation](#), two SERN scholars and one of their university colleagues discussed their visions for how the research process can yield actionable insights for actors in education policy and practice. A series of lightning research talks featured projects from SERN's K-12 Teachers and Classrooms grant portfolio that was designed to be responsive to the needs of practice. A final session highlighted a new data and working paper repository that could speed up the pace at which learnings from research can be shared, including with non-research audiences. Given what we knew about attendees' varied interests, these different components of the agenda were intentionally designed to speak to at least one interest area, whether that was promoting open science, engaging in research/practice partnerships, or learning about new innovations and advances in research represented in the featured studies.

3. What kinds of programmatic designs will reflect the event theme, achieve the event objectives, and foster engagement and learning?

Build on-ramps for all attendees. Especially in a multidisciplinary community that spans research, policy, and practice, no agenda will perfectly meet the needs of every attendee; rather than trying to meet this impossible goal, it can be helpful to consider how to structure an agenda where every attendee has at least one on-ramp into the event.

Use varied session formats to appeal to different types of attendees. Lightning research talks were a popular structure that SERN employed in multiple contexts to quickly share information on new or in-progress scholarship (see an [example of instructions for lightning talk presenters](#) and an [annotated session guide](#) from our annual scholarly convening). In subsequent breakout discussions, lightning

research talk presenters received feedback from other attendees on questions the presenters brought into the session. This proved to be an effective, scaffolded structure to promote interdisciplinary dialogue and engagement across research, practice and policy. Other attendees might find methods workshops to be a compelling structure that draws them to the convening. Regardless of the specific format, it is important to take the diverse interests of attendees into account and consider what different approaches and topics will be compelling to them.

Consider how to use technology to foster greater participation and engagement. SERN leveraged technology for in-person and virtual events to help achieve event objectives and support connection.

- We used the Sli.do platform at in-person and virtual events to capture attendees' reactions and questions at key points in the agenda. Sli.do populates responses on screen in real time, which allowed the group to see a range of attendees' thoughts in a brief amount of time, when we only would have been able to call on one or two people. Attendees could also upvote questions and comments, which helped to ensure that we were responsive to the overall interests of the group.
- During virtual events, we made strategic decisions about when to share slides and when to be in gallery view to contribute to a greater sense of community and togetherness. In gallery view, attendees were able to see one another and hopefully feel more connected than if the event was exclusively held in presenter mode or in a webinar format.
- At both in-person and virtual annual scholarly convenings, we supplied [instructions](#) and optional [slide templates](#) for lightning talk presenters to encourage speakers to touch on different points that would help make the talks accessible to a heterogeneous audience.

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Match form with function to achieve event objectives.

We selected session formats that advanced the event objectives. For example, some convenings included poster sessions for early career scholars to share their research, which was important for building authentic leadership opportunities and helping to raise their professional profile among the more established scholars in attendance.

In attempting to match form with function, we also explored other, less traditional formats for researcher-focused events that would help to meet objectives.

For example, in planning for our 2022 convening, we developed an objective focused on supporting new collaborations among attendees. To facilitate these collaborations, we explored an unconference format where attendees could pitch ideas about new projects and collaborations and other attendees could self-select into groups that most aligned with their interests. To do this, we engaged an experienced facilitator who had led unconferences with a number of audiences, including people who had not previously participated in unconferences, to ensure the session was thoroughly scaffolded. We also balanced this new convening format with more traditional structures, such as featured talks and lightning research talks, so that attendees had opportunities to stretch outside of their comfort zones as well as time in more familiar formats.

4. What kinds of meeting structures can set the tone for the event and intentionally build relationships, generative dialogue, and community?

Build in time and structure for social connection on both a personal and professional level. In addition to structures mentioned above that build connections and facilitate dialogue among attendees (such as breakout discussions), creating sufficient time and space for attendees to connect socially was another important element of our annual scholarly convenings to build the familiarity and trust necessary to build relationships and engage in constructive dialogue across silos—including collaborative disagreement at times.

- Most SERN events featured a set of icebreakers or connector questions that were intentionally designed to enable attendees to connect on both a personal and professional level. Although this structure may be more common in meeting settings outside of academia, we have observed these kinds of connectors less often at researcher-focused events, especially large conferences. In addition to building connections, these icebreakers helped to send important signals about the tone of the event and the core value of inclusion of all attendees (see an [annotated agenda](#) that shares facilitation moves from the opening icebreaker session).
- SERN also hosted dinners and receptions at in-person convenings to bring attendees together and further strengthen their connections. When shifting to virtual events during the COVID-19 pandemic, we leveraged a tech platform called Remo to host a virtual happy hour where attendees could mingle and mix among different tables to reconnect with longstanding colleagues and establish new connections.

Leverage the physical space and facilitation to enable generative dialogue across silos. SERN leveraged several event elements to facilitate discussion across disciplines, methodological approaches, career stages, and sectors.

- At in-person convenings, we typically had attendees sit at tables, rather than sitting in rows. We also assigned table numbers in advance, in order to support attendees' sense of belonging and encourage new connections.
- SERN often connected with individual scholar members in the community in advance and asked them to play specific roles during an event. For example, we might ask a SERN scholar to pose the first question following a featured talk to set the tone for the Q&A and signal an inclusive and welcoming learning environment.
- In breakout discussions, we asked facilitators to prioritize questions from early career scholars and attendees from practice and policy organizations to ensure their voices were heard alongside SERN scholars who were more familiar with the space.
- Through intentional seating assignments, activity designs (e.g., individual reflections and group brainstorming), and proactive facilitation of larger group discussions, we scaffolded discussions to be mindful of personalities and power dynamics in the room and to encourage contributions and constructive dialogue across attendees.

5. What is important to consider in identifying event participants and preparing them to engage across silos?

Customize preparation for various audiences given how they are entering the event and their roles. A key feature of SERN events was the care and intentionality we brought to preparing speakers, facilitators, and attendees, including how we differentiated this preparation by audience. Speakers and facilitators received in-depth prep documents that provided context for the convening and their specific session. They also participated in prep calls to review materials and answer questions ([see an example of a lightning talk session guide](#), [a breakout session guide](#), and [instructions for presenters](#)). Attendees received information about the theme, participants, and agenda in advance. SERN staff also used the opening session to describe the arc of learning attendees would embark on and preview how we would move through that arc at key points in the agenda. These design elements were particularly important for people who had not previously attended the annual scholarly convening.

SERN used the opening session of each event to describe the arc of learning attendees would embark on and to preview how we would move through that arc at key points in the agenda.

Select facilitators who understand the group context and event objectives. Selecting and preparing skilled facilitators who were familiar with researcher-focused events and had a deep understanding of SERN's internal- and external-facing objectives was an important element in setting the

tone for the event, creating a welcoming environment, and ensuring equity of voice.

We made intentional choices about when to use facilitators from within SERN staff and when to use non-staff facilitators who were familiar with SERN as an organization and the audience. In making these decisions about internal and external facilitators, we weighed staff capacity (i.e., how many facilitators would we need during a breakout and what else might staff need to be doing during that time), where we needed to signal important organizational messages that needed to come from SERN staff, and where more distance could enable certain facilitation moves (e.g., more proactive management to increase equity of voice in the room) and allow SERN staff to be focused on the content of presentations.

Consider where and when funders should be in attendance.

We were strategic about when and how to include funders in researcher-focused spaces and about how we could share learnings from events or sessions they did not attend.

For example, we hosted a funder panel at one of our early career fellowship events that was designed to share reflections about how private funders approach research funding; this conversation allowed early career scholars to gain powerful insights that they normally would not have access to at that stage in their career. At another event, we

invited public and private funders to share more about how their organizations approached issues like open science, inclusion, and diversity in education research, and closing the gaps between research and policy / practice audiences (see the [panel questions from SERN's funder sessions](#)).

These conversations fostered mutually beneficial learning and provided attendees with insights on how funders approach their work. In these examples, funders did not join for the full event but we found other ways to share updates, such as holding funder check-in calls to share takeaways about in-progress research from portfolios they were funding. Related to the point above, we were mindful of what preparation funders would need to engage in these spaces and what messages it would be most helpful for them to emphasize.

Identify and invite attendees with an eye to interpersonal and relational dynamics.

Attendee selection also played an important role in navigating group dynamics in our annual scholarly convenings, especially for attendees outside of academia. We were mindful to invite leaders from practice and policy organizations who were interested in research and would feel comfortable engaging in a researcher-focused event. We also had a practice of inviting the same practice and policy leaders to multiple convenings so they built familiarity and relationships within that space.