Exercise 1: 1-3-6-ALL

Liam Lysaght, Anders Telenius, Fatima Parker-Allie, Mélanie Raymond, Joe Miller
What will be the main role of nodes in GBIF’s next strategic period?

1. Consider this question on your own and note down your main idea on a sticky note

5 MINUTES
What will be the main role of nodes in GBIF’s next strategic period?

2. Make a group of three. Compare your ideas. Discuss and combine them or pick the one you wish to carry forward. Write your group’s idea on a sticky note

10 MINUTES
What will be the main role of nodes in GBIF’s next strategic period?

3. Discuss and compare your ideas in the group of 6. Write down your final idea to bring up to the front

10 MINUTES
What will be the main role of nodes in GBIF’s next strategic period?

4. Plenary summary of ideas by facilitators to feed into GBIF’s strategic planning process for next year

10 MINUTES
Exercise 1: 1-3-6-ALL

Liam Lysaght, Anders Telenius, Fatima Parker-Allie, Mélanie Raymond, Joe Miller
What will be the main role of nodes in GBIF’s next strategic period (2022-2026)?
Exercise 2: Strategic planning for your node

Liam Lysaght, Anders Telenius, Fatima Parker-Allie, Mélanie Raymond, Joe Miller
**Group activity to develop new ideas for your node’s future plans**

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**Strategic Planning process**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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| +/-  | Vision Statement  
- A brief description of what a Node wants to achieve or become |
| ✓    | Mission Statement  
- To provide national recording, assist |
| +/-  | National bioinformatics/institutional landscape  
Understanding your operational landscape and network |
| +/-  | Issues Statement  
- Identify some of the key issues that the Strategic Plan will address. |
| ✓    | Strategic Objectives  
- Identification of some high-level things you want to achieve over lifetime of Plan |
| ✓    | Actions  
- Identify specific actions that will help to meet the objectives you have identified |
| ✓    | Develop and implement work programme  
- Develop a work plan to delivery on the actions. |
| ✓    | Report  
- Track and report progress with implementation of the work plan. |
| ✓    | Review  
- Review the achievements of the Strategic Plan. |
Walt Disney’s creative strategy Robert Dilts method

Method based on the separation and collaboration of three roles:

The Dreamer
The Realist
The Critic

Image: Walt Disney from https://d23.com/about-walt-disney/
Technique adapted from: https://www.smashingmagazine.com/2019/03/conducting-brainstorming-workshops/
**Dreamer**
- Generates lots of ideas
- Free to imagine anything
- Doesn’t think about constraints

**Realist**
- Thinks about putting ideas into practice
- Looking for solutions
- Practical and logical thinking

**Critic**
- Analyzes risks
- Finds weak points
- Aims to prevent failures
Consider **strategic objectives** for your node’s next five years

1. Start off as a **Dreamer**
   Come up with as many ideas as you can.

10 MINUTES
Examples - By 2027, our node will:

Serve as a national centre for species occurrence data based on DNA

Support national biodiversity reporting requirements

Be the regionally recognized centre of excellence in university-level teaching on biodiversity informatics

Promote data mobilization through an annual grants programme for national data holders
Consider **actions** to support the strategic objectives for your node’s next five years

2. Pair up with another Node Manager. Share your ideas and employ **Realist** thinking. Note actions to support the strategic objectives.

**25 MINUTES**
Examples - By 2027, our node will

Serve as a national centre for species occurrence data based on DNA

Receive a mandate from the Ministry of Environment to include genetic-based species occurrence information in our national system

Train a community of data holders on how to publish DNA-based species occurrence data to GBIF

Partner with the national barcoding initiatives

Partner with the national University to integrate biodiversity informatics into the teaching curricula

Be the regionally recognized centre of excellence in university-level teaching on biodiversity informatics

Develop a national biodiversity informatics forum to engage the community on an annual basis

Foster partnerships with other universities in the region to enable student exchanges around biodiversity informatics programmes

...
Consider the **risks** associated with the strategic objectives for your node’s next five years

3. In your pair, go into **Critic** mode. Identify the risks that could prevent your strategies from succeeding.

**15 MINUTES**
Examples - Risks:

The mandate for dealing with genetic-based species information is managed by another national institution which will put the node in competition.

The Ministry of Research may undergo funding cuts.

The University teaching programmes are slow to change.

...
Write up your preferred **strategic objectives and associated actions** for your node’s next five years

4. Back on your own, wrap up your plan. Look for the objectives with practical actions and few risks. End up with no more than 5 strategic objectives.

10 MINUTES
Practice pitching your plan

Take it in turns to pitch one of your strategic objectives to your group. Keep note of feedback.

5 MINUTES EACH
Exercise 2: Strategic planning for your node

Liam Lysaght, Anders Telenius, Mélanie Raymond, Joe Miller
Exercise 3: Your experiences with communication and stakeholder engagement

Carole Sinou, Anabela Plos, Cristina Villaverde, Mélanie Raymond, Laura Russell
What has worked well for you in engaging your node’s community?

Consider how you have engaged with members of the KEY AUDIENCES:

- Data holders
- Biological knowledge experts
- Data users
- Decision makers
- Public stakeholders
What has worked well for you in engaging your node’s community?

Note down:

1. Who specifically were you engaging?
2. What was the key message you were conveying?
3. What was the type of interaction?
4. What medium did you use to convey your message?
What has worked well for you in engaging your node’s community?

1. Who specifically were you engaging?

   Data holders

   E.g.
   - Natural History Museum Curator
   - Citizen scientist network
   - Local communities
   - Environmental impact assessors
   ...

...
What has worked well for you in engaging your node’s community?

2. What **key message** were you conveying?

E.g. Publishing your data will
- increase your institution’s international visibility
- allow you to track how the collection is being used in peer-reviewed research

Data holders

Natural History Museum Curator
What has worked well for you in engaging your node’s community?

3. What was the type of interaction (if any)?

E.g.
An institutional visit
A training workshop
A conference
...

Data holders

Natural History Museum Curator
What has worked well for you in engaging your node’s community?

4. What medium did you use to convey your message?

- E.g. Presentation
- One-to-one discussion
- Email exchanges
- Social media activities
- Brochure

Data holders

Natural History Museum Curator
What has worked well for you in engaging your node’s community?

Note down as many examples as possible and paste them under the appropriate KEY AUDIENCES

30 MINUTES
Exercise 3: Your experiences with communication and stakeholder engagement

Carole Sinou, Anabela Plos, Cristina Villaverde, Mélanie Raymond, Laura Russell
What has worked well for you in engaging your node’s community?

Note down:
1. Who specifically were you engaging?
2. What was the key message you were conveying?
3. What was the type of interaction?
4. What medium did you use to convey your message?
Which of the key audiences is the most important for your node to engage next?

Consider your priority key audience and read the examples shared by other nodes over the break.

- Data holders
- Biological knowledge experts
- Data users
- Decision makers
- Public stakeholders
Exercise 4: Communication for stakeholder engagement

Carole Sinou, Anabela Plos, Cristina Villaverde, Mélanie Raymond, Laura Russell
Which of the key audiences is the most important for your node to engage next?

Go to your priority key audience and read the examples shared by other nodes.
Which of the key audiences is it most important for your node to engage with next?

Form a pair or group of three

Discuss the communication challenge you wish to address together
Which of the key audiences is it most important for your node to engage with next?

Define the scenario you are working with:

1. Specific target audience
2. Key message
3. Type of interaction
Practice developing a communications activity

1. Who specifically are you engaging?

   E.g.
   - Natural History Museum Curator
   - Citizen scientist network
   - Local communities
   - Environmental impact assessors
Practice developing a communications activity

2. What **key message** will you be conveying?

E.g. Publishing your data will
- increase your institution’s international visibility
- allow you to track how the collection is being used in peer-reviewed research

Data holders

Natural History Museum Curator
Practice developing a communications activity

3. What type of interaction and medium will you use?

- Data holders

- Natural History Museum Curator

E.g. Presentation at conference
- Training workshop
- One-to-one discussion
- Email exchanges
- Social media activities
- ...

GBIF
Practice developing a communications approach

4. What **medium** will you use to convey your message?

E.g.
- Presentation
- One-to-one discussion
- Email exchanges
- Social media activities
- Brochure

**Data holders**

Natural History Museum Curator
Practice developing a communications activity

Work on developing the medium/resource in your pair/group

- Consider filming your presentation on your phone
- Think about a communication agenda if you are e.g. planning a social media campaign
- Ask your mentor to help you with a role play

45 MINUTES
Practice developing a communications activity

Present your communications approach to another team for feedback

40 MINUTES
Exercise 4: Communication for stakeholder engagement

Carole Sinou, Anabela Plos, Cristina Villaverde, Mélanie Raymond, Laura Russell
Developing a training plan

Fatima Parker-Allie, Carole Sinou, Anabela Plos, Niels Raes, Laura Russell, Mélanie Raymond
In what ways do you need to enhance capacity in your nodes community?

Consider how you’ve previously enhanced the capacity of the KEY AUDIENCES and how you’d like to do so now.
In what ways do you need to enhance capacity in your nodes community?

Note down:

1. Who do you need to capacitate?
2. What topics will you cover?
3. How will you deliver the information?
4. Where does this fall in your list of strategic priorities?
In what ways do you need to enhance capacity in your nodes community?

1. Who specifically do you need to capacitate?

- Data holders
  - e.g.
  - Natural History Museum Curator
  - Citizen scientist network
  - Local communities
  - Environmental impact assessors
  - ...
2. What topics will you cover?

In what ways do you need to enhance capacity in your nodes community?

Data holders

Natural History Museum Curator

e.g.
how to clean and standardize data
how to publish data
...

GBIF
In what ways do you need to enhance capacity in your nodes community?

3. How will you **deliver** the information?

Data holders

Natural History Museum Curator

e.g.
- mentoring or help desk
- written documentation or instructional video
- training workshop
- elearning module
- ...

GBIF
In what ways do you need to enhance capacity in your nodes community?

4. Where does this fall in your list of strategic priorities?

Data holders

Natural History Museum Curator

e.g.
high
medium
low
...

GBIF
In what ways do you need to enhance capacity in your nodes community?

Note down as many examples as possible and paste them under the appropriate KEY AUDIENCES

30 MINUTES
Developing a training plan

Carole Sinou, Anabela Plos, Niels Raes, Laura Russell, Méliannie Raymond
In what ways do you need to enhance capacity in your nodes community?

Note down:

1. Who do you need to capacitate?
2. What topics will you cover?
3. How will you deliver the information?
4. Where does this fall in your list of strategic priorities?
In what ways do you need to enhance capacity in your nodes community?

Consider your key priority and read the ideas shared by other nodes over the break.
Developing and implementing training

Fatima Parker-Allie, Carole Sinou, Anabela Plos, Niels Raes, Laura Russell, Mélanie Raymond
In what ways do you need to enhance capacity in your nodes community?

Go to key audience under which your primary priority falls and read the priorities and examples shared by other nodes.
What is your primary strategic priority for training?

Form a pair or group of three

Choose your topic and delivery method
Define the training:

1. Key audience
2. Topic(s)
3. Delivery method

What is your primary strategic priority for training?
Define the training:

4. Possible partners
5. Required resources
6. Logistical planning
   a. creating materials/reusing materials
   b. wrangling people

What is your primary strategic priority for training?
What is your primary strategic priority for training?

Define the training:

7. Launch
8. Follow-up
9. Evaluation/reporting
Practice

Work in your pair/group to develop an implementation plan

- Develop a timeline for implementing your plan
- Add necessary details (include agenda if a workshop)
- Consider possibility to develop partnerships (more in Module 4)
- Think about ways to communicate your training (refer to Module 2)

55 MINUTES
Present to another group for feedback, using the provided exercise sheet or in the format of your choice

30 MINUTES
Developing and implementing training

Carole Sinou, Anabela Plos, Niels Raes, Laura Russell, Mélianie Raymond
Exercise 7: Nodes resourcing speed dating activity

Liam Lysaght, Anders Telenius, Jean Cossi Ganglo, Anne Sophie Archambeau
Maheva Bagard Laursen, Mélanie Raymond
Human spectogram - overview of resourcing in the nodes community

1. How does your node resource its activities?

2. What type of resourcing do you want for your node?
Exploring ideas for resourcing nodes activities through speed dating

- Find a seat and discuss in pairs
- After 10 mins, blue seats swap to another space; red seats stay
- Note ideas and tips on sticky notes
- Start a new conversation in pairs
- After 10 mins, red seats swap to another space, blue seats stay
- ...

4 x 10 MINUTES
Share your experience in resourcing your node’s activities

What type of resources / support do you have for your node’s activities?

What have been the main areas of success in resourcing your activities? How did you successfully argue the case for GBIF Participation?

What could other nodes learn from your experience?

Share tips and recommendations on sticky notes
Share your experience in resourcing your node’s activities

The Secretariat will compile all the tips and recommendations that you share into guidance for nodes on the topic of resourcing!
Exercise 7: Nodes resourcing speed dating activity

Liam Lysaght, Anders Telenius, Jean Cossi Ganglo, Anne Sophie Archambeau
Maheva Bagard Laursen, Mélanie Raymond
Share your experience in resourcing your node’s activities

What type of resources / support do you have for your node’s activities?

What have been the main areas of success in resourcing your activities? How did you successfully argue the case for GBIF Participation?

What could other nodes learn from your experience?

Share tips and recommendations on sticky notes
Exercise 8: Learning from the role of project assessors

Liam Lysaght, Anders Telenius, Jean Cossi Ganglo, Anne Sophie Archambeau
Maheva Bagard Laursen, Mélianie Raymond

GLOBAL NODES TRAINING 2019
Team assessments of 3 typical project types

1. Mentoring partnerships
2. Data mobilization projects
3. Training workshops and regional events
 Assess a fictitious project with help from a mentor

- Join a group for your chosen project type
- Assess and score a fictitious concept note
- Hold a meeting of the evaluation panel and decide if the project team should be invited to submit a full proposal

25 MINUTES
Develop a full proposal based on feedback

- Imagine that the concept note has been invited to prepare a full proposal but with budget cuts
- Discuss how you will prioritize activities
- Develop the activities for the full proposal
- Share your results on the eLearning platform

25 MINUTES
Exercise 8: Learning from the role of project assessors

Liam Lysaght, Anders Telenius, Jean Cossi Ganglo, Anne Sophie Archambeau
Maheva Bagard Laursen, Mélanie Raymond