# Exercise 1: 1-3-6-ALL

*Liam Lysaght, Anders Telenius, Fatima Parker-Allie, Mélianie 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

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# 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**

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# 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**



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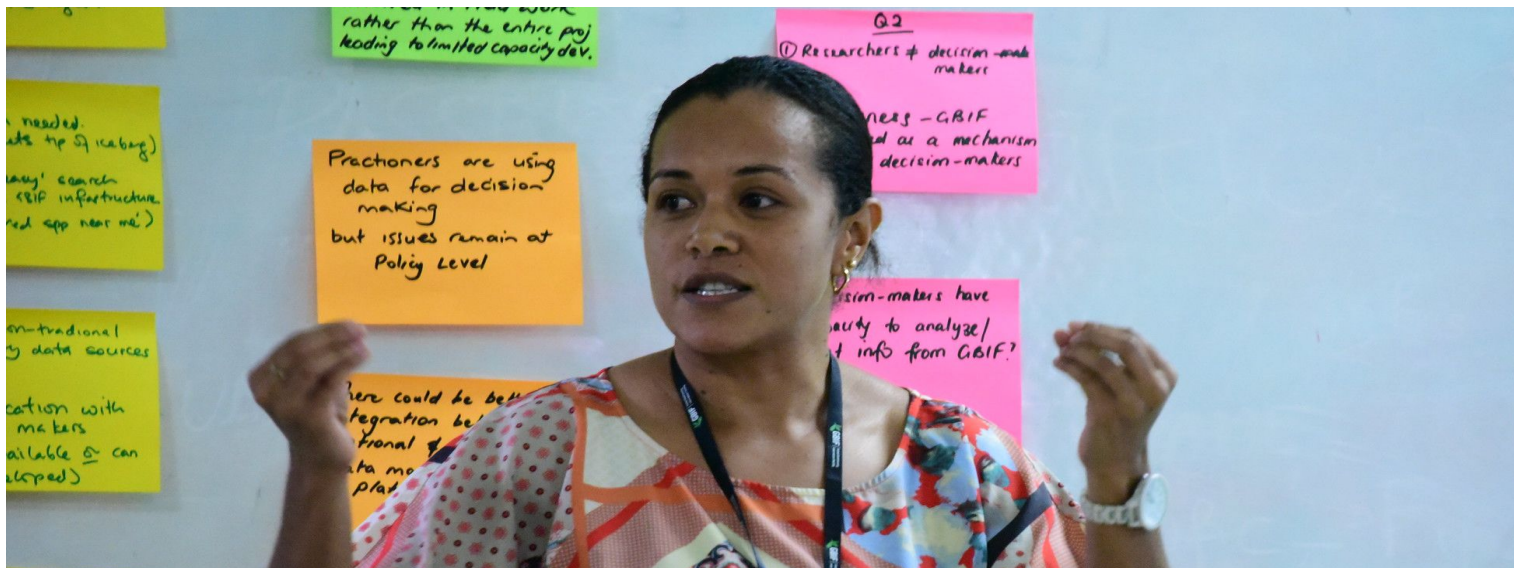# What will be the main role of nodes in GBIF's next strategic period?



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, Mélianie Raymond, Joe Miller*

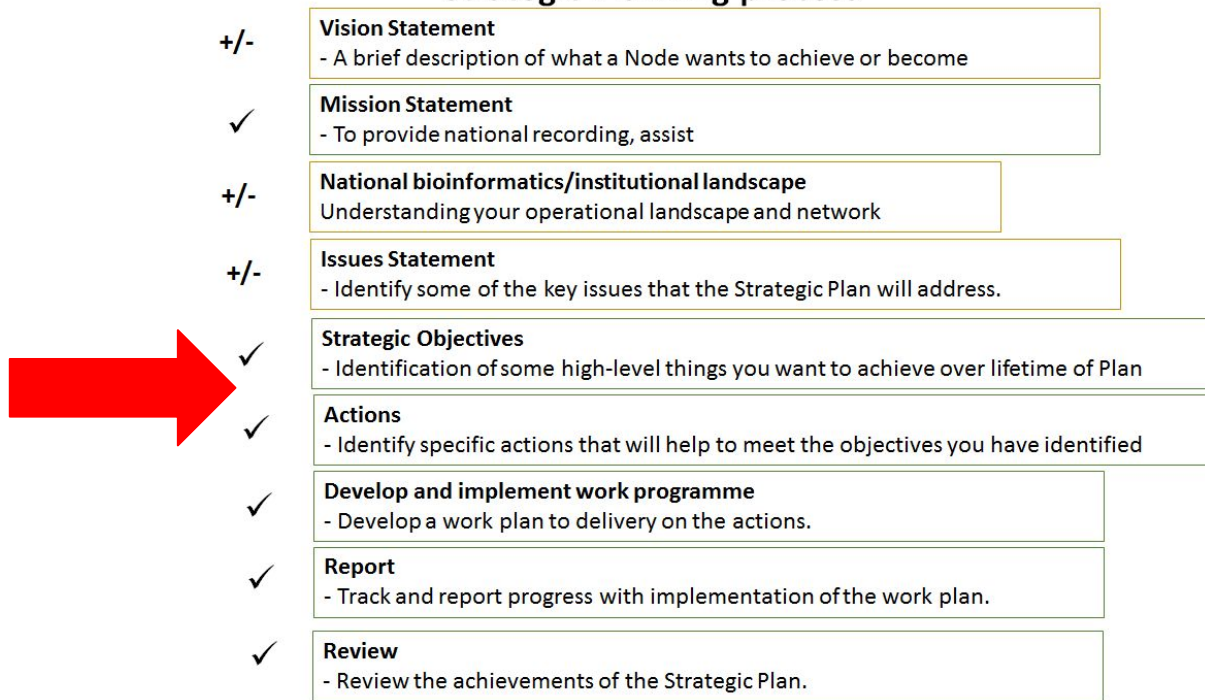# What will be the main role of nodes in GBIF's next strategic period (2022-2026)?

# Exercise 2: Strategic planning for your node

*Liam Lysaght, Anders Telenius, Fatima Parker-Allie, Mélianie Raymond, Joe Miller*

# Group activity to develop new ideas for your node's future plans

## Strategic Planning process

+/-  **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.

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# Walt Disney's creative strategy Robert Dilts method

Method based on the separation and collaboration of three roles:
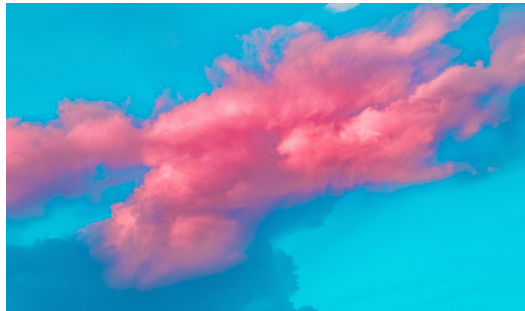
**The Dreamer**
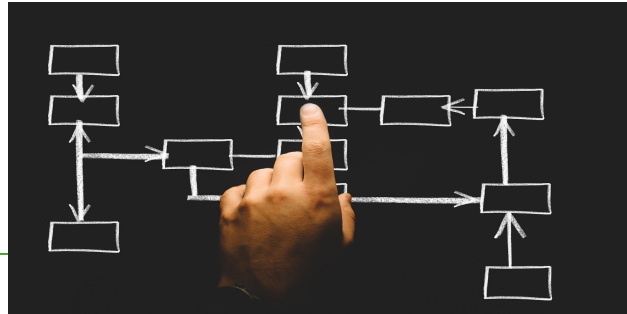**The Realist**
**The Critic**

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# 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 <u>strategic objectives</u> for your node's next five years

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



# 10 MINUTES

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# 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 <u>actions</u> 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

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

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

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

...

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# Consider the <u>risks</u> 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

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# 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

...

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# Write up your preferred <u>strategic objectives</u> and <u>associated actions</u> 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**

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# 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**



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# **Exercise 2: Strategic planning for your node**

*Liam Lysaght, Anders Telenius, Mélianie Raymond, Joe Miller*

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# Exercise 3: Your experiences with communication and stakeholder engagement

*Carole Sinou, Anabela Plos, Cristina Villaverde, Mélianie Raymond, Laura Russell*

GLOBAL NODES TRAINING 2019

# 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

...

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# What has worked well for you in engaging your node's community?

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



Data holders

Natural History Museum Curator

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**

...

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# What has worked well for you in engaging your node's community?

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



Data holders

Natural History Museum Curator

E.g.

**An institutional visit**

**A training workshop**

**A conference**

...

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# What has worked well for you in engaging your node's community?

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



Data holders

Natural History Museum Curator

E.g. **Presentation**

**One-to-one discussion**

**Email exchanges**

**Social media activities**

**Brochure**

...

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# 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, Mélianie 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?

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**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, Mélianie 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


Data holders


Biological knowledge experts


Data users


Decision makers


Public stakeholders

# 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?



Data holders

E.g.

Natural History Museum Curator

Citizen scientist network

Local communities

Environmental impact assessors

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# Practice developing a communications activity

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



Data holders

Natural History Museum Curator

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**

...

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# 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**

...

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# **Practice developing a communications approach**

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



Data holders

Natural History Museum Curator

E.g.

**Presentation**

**One-to-one discussion**

**Email exchanges**

**Social media activities**

**Brochure**

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# 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

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# Practice developing a communications activity

Present your communications approach to another team for feedback

# 40 MINUTES

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# Exercise 4: Communication for stakeholder engagement

*Carole Sinou, Anabela Plos, Cristina Villaverde, Mélianie Raymond, Laura Russell*

# Developing a training plan

*Fatima Parker-Allie, Carole Sinou, Anabela Plos, Niels Raes, Laura Russell, Mélianie 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.


Data holders


Biological knowledge experts


Data users


Decision makers


Public stakeholders

# 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**

**...**

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

2. What **topics** will you cover?



Data holders

Natural History Museum Curator

e.g.

**how to clean and standardize data**

**how to publish data**

**...**

# 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**

...

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# 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**

...

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# 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, Mélianie Raymond*

GLOBAL NODES TRAINING 2019

# 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?

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# 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


Data holders


Biological knowledge experts


Data users


Decision makers


Public stakeholders

# Developing and implementing training

*Fatima Parker-Allie, Carole Sinou, Anabela Plos, Niels Raes, Laura Russell, Mélianie 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


Data holders


Biological knowledge experts


Data users


Decision makers


Public stakeholders

# What is your primary strategic priority for training?

Form a pair or group of three

Choose your topic and delivery method



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# What is your primary strategic priority for training?

Define the training:

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



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# 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

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# What is your primary strategic priority for training?

Define the training:

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

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# 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

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# Practice

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

# 30 MINUTES

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# 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, Mélianie Raymond*

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# 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?

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# Exploring ideas for resourcing nodes activities through speed dating
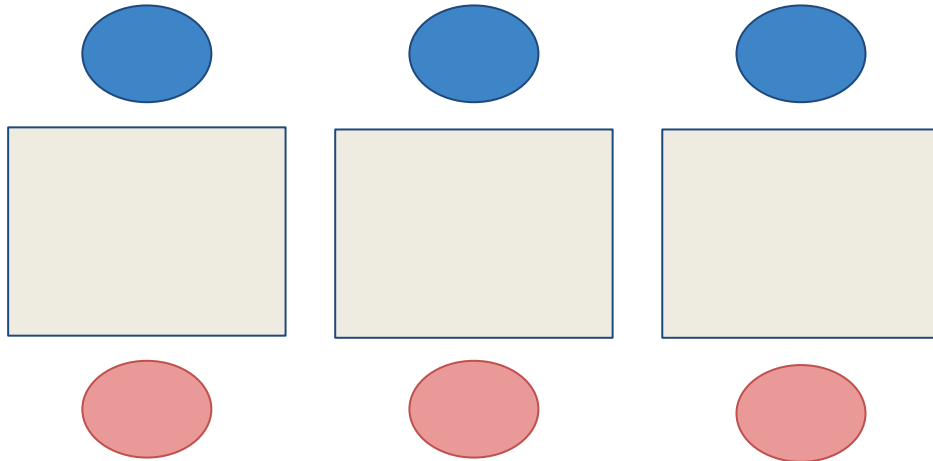


**4 x 10 MINUTES**

- 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**
- ...

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# 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

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# 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!

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# Exercise 7: Nodes resourcing speed dating activity

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

GLOBAL NODES TRAINING 2019

# 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

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# Exercise 8: Learning from the role of project assessors

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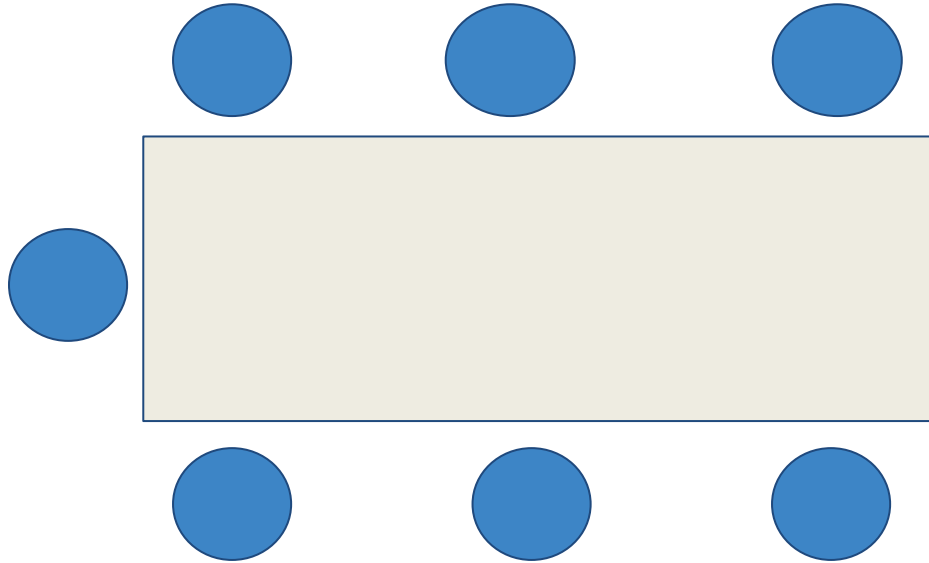*Maheva Bagard Laursen, Mélianie Raymond*

# Team assessments of 3 typical project types

1. Mentoring partnerships
2. Data mobilization projects
3. Training workshops and regional events


Trainers and mentors at BID Caribbean regional meeting 2019

GBIF

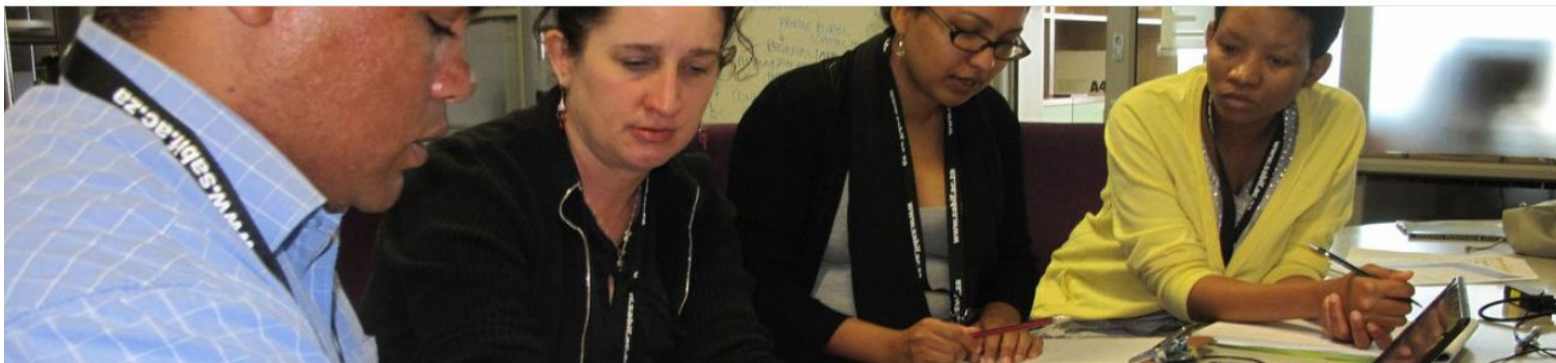# Assess a fictitious project with help from a mentor



## 25 MINUTES

- 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

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# 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

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# Exercise 8: Learning from the role of project assessors

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

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