Planning Preparation Steps

(for facilitators)

# **Month 1**

## Step 1: CPSG facilitator & core team engaged

Format: Online through email or meetings

* With the contracting organisation or “client” agree a draft brief (e.g. project scope and required outputs, to be refined later) and terms of engagement (e.g. CPSG deliverables, funding for fees & expenses).
* Establish the core planning team.
* Communicate early with the relevant Specialist Group(s). Engage them in the process as appropriate.
* Obtain or confirm support of the appropriate government wildlife authority (e.g. an invitation or other formal recognition).
* Consider the role of the project in contributing to delivery of CBD Targets within the relevant nation(s) – plan to maximise any opportunities.

## Step 2: Agree scope, aims and structure of planning project

Format: Online Meeting 1

* Present background on CPSG: workshop philosophy, planning approach (e.g. Principles & Steps summary).
* Agree project scope (taxonomic, geographic, management system, other)
* Develop a statement explaining the situation and the pathway through which this planning initiative will lead to change (where useful reflect this in 3-5 planning project goals).
* Agree expected outputs (e.g. workshop report/detailed planning document/other)
* Decide on an appropriate environment for discussions (i.e. in-person or on-line)
* Determine the need for translation
* Discuss responsibility and framework for plan implementation (agree whether determining this will be part of the planning process)

# **Month 2**

## Step 3: Likely key issues and tools agreed

Format: Online Meeting 2

* With the planning team, complete a “rapid run-through” of the planning steps to identify the main planning themes (recognizing these may change as things progress) and what threats & obstacles might exist in addressing them
* Decide tools, where they fit in the process and what work needs to be done in advance (e.g. discuss and agree on the need for: PVA modelling; Wildlife Disease Risk Analysis; evaluation of *ex situ* needs; grouping analysis for multi-species planning; integration of Red List (RL) assessment(s)/Green Status Assessments/KBA analyses or other tools or IUCN Guidelines.
* Ensure the evaluation of *ex situ* options is incorporated into the workshop process, at the appropriate scale and time.
* Identify, and where relevant connect with existing conservation plan affecting the species (these may be species- area- or threat-based).

## Step 4: Determine who will be involved and how

Format: Online Meeting 2 & 3

* Complete a stakeholder analysis and agree priorities considering the space available and the appropriate proportions of different sectors given the likely key issues (e.g. *in situ* and *ex situ* implementers, local communities, business, government, etc).
* Approach potential “issue/topic” leaders approached and engaged (where needed, e.g. for PVA/DRA)
* Where needed, agree other suitable engagement methods for important stakeholders not attending the in-person or on-line sessions (e.g. creating a workshop website, social media group, etc.).

# **Month 3**

## Step 5: Dates, venue, and duration agreed

Format: Online through email or meetings

* Check workshop dates do not overlap with important local, national, and international events or holidays
* Draft a planning agenda that fits the proposed duration/schedule agreed
* Verify local coordination and infrastructure and confirm suitable venue with appropriate workshop rooms for expected participant numbers, and accommodation if needed.

## Step 6: Invitation letter agreed and sent out

Format: Online through email or meetings

* Work with planning team to write invitation letter, including workshop and registration details. Send out.

## Step 7: Agreed tools or analyses are developed (e.g. PVA models)

Format: Online through email or meetings, or in-person

* Conduct any required pre-planning analyses (e.g. PVA modeling, multi-species A2P analyses, Disease Risk Analyses, other).
* Where necessary (e.g. where technical working groups may require specialist facilitation – e.g. for DRA, PVA, other), identify working group facilitators ahead of time and organize pre-workshop training where needed.

# **Month 4**

## Step 8: Draft program agreed

Format: Meeting 4

* Review draft agenda with planning team, identify any potential issues with timing or other logistics.
* Agree what briefing materials will be circulated and who will develop them.

## Step 9: Potential presenters and support team approached and engaged

Format: Online through email or meetings

* Agree on and engage keynote speakers and presenters for background/scene-setting presentations.
* Where necessary, identify working group facilitators and note-takers ahead of time and organize for pre-workshop training (if required) through online materials or face-to-face.

# **Month 5**

## Step 10: Briefing materials finalized

Format: Online through email or meetings

* Finalize key information, documents and analyses to share with participants before the workshop.

## Step 11: Workshop equipment confirmed

Format: Online through email or meetings

* Check that the required audio-visual equipment, printer, flip-charts and easels, pens, tape/pins, sticky dots, post-it notes, hanging space, notepads & pens/pencils, name tags etc. can be provided.
* Identify any equipment not available locally and make alternative arrangements.

## Step 12: Agree communications strategy

Format: Online through email or meetings

* Agree communications strategy for workshop or planning project and for any outputs (e.g. final report, social media posts, etc.).

# **Month 6**

## Step 13: Circulate final workshop information (logistics and briefing materials)

Format: Online through email

* Circulate final information on travel to and from the venue, accommodation etc.
* Circulate final briefing materials (reference information and pre-meeting analyses)

## Step 14: Finalise workshop materials

Format: Offline personal/facilitator work

* Finalise slide presentations
* Assemble and print additional information for participants such as maps, species info etc. for use in plenary or working group sessions.
* Where appropriate, finalise a workshop handbook for use by facilitators.

# **Month 7**

## Step 15: FACILITATE WORKSHOP

* **Check workshop space is laid out appropriately (table and room configuration) and any breakout groups can be well accommodated (i.e. the space won’t be too crowded, participants will be able to hear each other, there is wall/window space for hanging flipchart sheets and other materials).**
* **Check equipment**
* **Hang the working agreement**
* **FACILITATE WORKSHOP AND ENGAGE EDITING TEAM**

## Step 16: Circulate post-workshop evaluation survey (within one week)

Format: Online through email

* Circulate post-workshop survey immediately after the close of the workshop (or as soon as possible afterwards).
* Analyse the results and share with organisers.

# **Within 1-month post-workshop**

## Step 17: Circulate draft report

Format: Online through email

* Agree editing and sign-off process with core team and editing team (if different).
* Agree communications/announcements related to the “launch”.
* Compile draft report with assistance from the editing team and circulate for initial comment (scope of circulation agreed with core team - ideally all planning participants receive it).

# **Within 1-year post-workshop**

## Step 18: Report circulated to participants for final approval

Format: Online through email or on appropriate platform

* Work with editing team on iterations of the draft report.
* Ensure participants have enough opportunity to comment.
* Check all participants “can live with” the final version before completion - that is, that there are no major errors or issues that participants object to.

## Step 19: Final report circulated and promoted

* Circulate or “launch” final version and promote as agreed.

# **3 years post-workshop**

## Step 20: Plan implementation survey sent out and analysed

Format: Online through email or on appropriate platform

* Liaise with the core team to send out an implementation survey no less than one year after circulation of the final report and at least 3 years after the workshop.
* Analyse the results and share with organisers.

**Note for CPSG Facilitators:**

* Fill out the CPSG Project Outline sheet as you progress through the workshop process to keep track of project status.
* Submit a pdf of the final report for the CPSG web-site
* Remember to log in the CPSG system:
  + The final Project Outline sheet
  + The workshop and implementation survey results
  + The final project details (moving them from the current projects database to the project archive database)

# **Timeline summary**

# **Month 1**

* Step 1: CPSG facilitator & core team engaged
* Step 2: Agree scope, aims and structure of planning project

# **Month 2**

* Step 3: Likely key issues and tools agreed
* Step 4: Determine who will be involved and how

# **Month 3**

* Step 5: Dates, venue, and duration agreed
* Step 6: Invitation letter agreed and sent out
* Step 7: Agreed tools or analyses are developed (e.g. PVA models)

# **Month 4**

* Step 8: Draft program agreed
* Step 9: Potential presenters and support team approached and engaged

# **Month 5**

* Step 10: Briefing materials finalized
* Step 11: Workshop equipment confirmed
* Step 12: Agree communications strategy

# **Month 6**

* Step 13: Circulate final workshop information (logistics and briefing materials)
* Step 14: Finalise workshop materials

# **Month 7**

* Step 15: FACILITATE WORKSHOP
* Step 16: Circulate post-workshop evaluation survey (within one week)

# **Within 1-month post-workshop**

* Step 17: Circulate draft report

# **Within 1-year post-workshop**

* Step 18: Report circulated to participants for final approval, and launched
* Step 19: Final report circulated and promoted

# **3 years post-workshop**

* Step 20: Plan implementation survey sent out and analysed