**Building you Research Plan**

Workshop template

**Introduction:**

Before building a research plan, it is worth having a discussion with your team and possibly other stakeholders such as board members, volunteers and service users. This can help you gather everyone’s ideas and concerns, and ensure that the relevant people are on board with your plan. This exercise can be scaled up or down depending on your needs and the complexity of the research plan you hope to build. Use the following purely as guidance for how to consult relevant parties about your research plans.

**Objective:**

* Discuss risks and opportunities of engaging in research
* Identify and/or flesh out main research priorities (if any)
* Identify areas that will need to be monitored or will need polices in place to protect against risk (if any)

**Time:**

Allocated at least 90 mins, but this depends on the number of participants

**Materials:**

* Minimal PowerPoint slides outlining the purpose of the workshop and any other relevant information (e.g. what you might have done in the research space so far, any priorities that might have already been identified and need to be fleshed out, ground rules for respectful discussion)
* Four sheets of flipchart people stuck to the wall each with a different heading: Opportunities, Risks, Mitigation, and Capitalization
* Post its
* Pens and markers

*(If conducting this online, a tool like* [*Google Jamboard*](https://edu.google.com/jamboard/) *or* [*Padlet*](https://padlet.com/) *would work just as well).*

**Method:**

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| **Warm up:** | Welcome everybody and explain the workshop objectives. |
| Consider a short ice-breaker to get everyone engaged. [Here are some suggestions](https://www.workshopper.com/post/icebreakers-for-meetings-and-workshops). |
| Go through any slides you have prepared to provide context and ground rules |
| **Tasks:** | If larger than 5 – 6 participants in can be worth breaking people into groups of no more than 5 for each of the tasks. Each group should have post its and pens to take notes.  Tip: use different colored post its for every question to visualise better the amount of risks, opportunities, strengths and capitalization strategies. That way you can make a better-informed decision about proceeding. |
| Pose the first question and give each group at least 10 mins to discuss.  “What are the **opportunities** we might have if we engage in more research projects and collaborate with researchers? How would it help our organization? What strengths or assets could we bring to a project?”  Ask groups to write down their ideas, one idea per post it. At the end of the discussion, ask them to stick it up on the “Opportunities” paper.  Once all the post its have been stuck, go through them together. Group them into themes and try to identify and note down the core opportunities identified. |
|  | Pose the second question:  “What are the **risks or concerns** we might have about engaging in research projects and collaborating with researchers?”  Ask groups to write down their ideas, one idea per post it. At the end of the discussion, ask them to stick it up on the “Risks” paper.  Once all the post its have been stuck, go through them together. Group them into themes and try to identify and note down the core opportunities identified. |
|  | Summarise the risks you have just explored and pose the third question to the groups, giving them at least 10 mins to discuss:  “What **mitigating strategies** could we put in place to reduce or counteract these risks we’ve identified?”  Ask groups to write down their ideas, one idea per post it. At the end of the discussion, ask them to stick it up on the “Mitigation” paper. Once all the post its have been stuck, go through them together.  Ideally, for each risk, a mitigating strategy will be identified, e.g. if the concern is fort service users' wellbeing and safety, maybe developing a comprehensive policy for researchers engaging with service users will help to safeguard against any possible risk in that area. But if you don’t identify a mitigating strategy for each risk, there is no need to worry. Remind the group that:   1. You can seek advice for how to mitigate any risks that remain without a strategy (e.g. from The Wheel) 2. It is impossible to completely eliminate all risk, and sometimes calculated risks are worth taking for the potential learning and growth that may emerge 3. This is just the planning phase, and you may still decide as an organization not to pursue research, but it’s important to have the conversation anyway |
|  | Revisit your opportunities page from the first question, and summarise the results. Ending with opportunities helps to ensure that the sesson concludes on a positive note! Pose the fourth question:  “What are possible **capitalization strategies** to take advantage of the opportunities identified?”  Ask groups to write down their ideas, one idea per post it. At the end of the discussion, ask them to stick it up on the “Capitalisation” paper. Once all the post its have been stuck, go through them together.  Ideally, for each opportunity, a capitalization strategy will be identified, e.g. If your core opportunity is strengthening your advocacy work, ensure that every project you commit to lends something towards your advocacy goals. But if you don’t identify a capitalization strategy for each opportunity, there is no need to worry. Remind the group that:   1. You can seek advice for how to capitalize any opportunities that remain without a strategy (e.g. from The Wheel) 2. You can take each research opportunity as it comes and see if there are other ways that have not been thought of yet to optimize opportunities |
| **Conclusion:** | Ask people if they have any final observations before closing the workshop and thank them for their time and for sharing.  Make sure to circulate a document summarizing the outputs of the workshop to all attendees, and use the feedback if you are going on to create a research profile. |