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**Conservation Coach Training**

**Setting the Stage for an**

**Open Standards Planning Process Exercise Instructions (45 minutes)**

**Purpose of exercise:**

1. To capture positive Open Standards experiences.
2. To elucidate some of the common issues that come up in getting a project start

**Roles:**

Coach/Facilitator

Co-facilitator

Team Members

**Instructions:**

**Part one. Capture a list of “best experiences.” (20 minutes)**

1. Once participants have been chosen, they decide between themselves who would like to be lead **Coach/Facilitator** and who will be **co-facilitator** and they decide where to position themselves in the room.
2. The **Coach/Facilitator** allows participants to take a few minutes to think and then write down on large format sticky notes a few thoughts responsive to the question:

*Thinking about the best Open Standards workshop you ever participated in or led, what were the things that you believe were done at the outset to make the process successful?*

1. The **Coach/Facilitator** then prompts the participants to share their thoughts by going around the table using a “round robin approach” (Facilitation tip). The responses that relate directly to “preparing to plan” are put up on the wall. Participants are encouraged to discuss and ask questions about some of the things that are captured on the wall.
2. The **Coach/Facilitator** brings the participants’ attention back together and asks them to look at the Getting Started PowerPoint. Go page by page and ask if what they saw is captured in the ppt. What else did they find that isn’t captured in the ppt? What surprised them?

**Part two. Setting the Stage Scenarios (20 minutes)**

Before a coach can design a good process there are some things the coach needs to know and a number of key things the project teams needs to have in place and agreed upon to enable success.

1. The **Coach/Facilitator** works with a small group on one of the two scenarios. There may be replicates of each scenario. With the scenario in mind, the group should make a list of the things you want to go over with your colleague and his/her partner.

* Identify questions you might ask him/her
* Consider suggestions you would make to him/her to get this process started well.

1. The **Coach/Facilitator** or **Co-facilitator** makes a list on flip chart papers using best “flip chart etiquette” (Facilitation tip).
2. After the groups complete their lists, the **Coach/Facilitator** has the participants take 10 minutes to walk around and look at the work of the other teams to learn from each other’s ideas and identify “best practices” among them.
3. Allow five minutes at the end of the exercise for the participants to individually record their own “What I want to take home and use in my coaching.”
4. *Extra credit team discussion: Are there things that you might learn in your early investigation that might prompt you to suggest to your colleague and partner that it might not be the best time for them to embark upon this process at this time?*
5. After which lead **Coach/facilitator** will always give the team members the last word.
6. **Instructor** will then ask the team members to provide feedback to the **facilitators**.

**Scenario 1 – A single “internal” project team**

The leader of a prairie (grassland) conservation project comes to you and asks you to coach her and her project team through an Open Standards process to develop a 1st iteration plan. Her project is a new priority project for your organization. The plan is largely meant to provide direction for your organization’s work as they launch this new project.

**Scenario 2 – A multi-partner “Extravaganza”**

You receive a request from a colleague for help. Their government partner wants to develop a restoration and management plan for a large river system. The government partner is one of many different public agencies who have some responsibilities in the watershed. Some of the agencies have regulatory authority and some have lands that they manage. This river is a priority area for your organization. The partner has heard about the Open Standards and your organizations expertise in this process and wants your colleague to organize a multi-partner/stakeholder workshop to develop some shared strategies and measures for the project. Your colleague heard that you were a Conservation Coach and has come to you to ask you to help design and facilitate a process that will work for this partner and also lead to some good conservation strategies.