

Fostering Research Collaborations Training Toolkit – **Facilitator Guide**

This document and the associated resources have been developed to help other organizations use and adapt the training materials designed to facilitate the workshop Fostering Research Collaborations at the Graduate and Postgraduate Levels.

TITLE	Fostering Research Collaborations at the Graduate and Postgraduate Levels
OBJECTIVE	<p>First Meeting Scenario Activity</p> <p>The first meeting scenario is the main learning activity designed for the Fostering Research Collaborations workshop. Please consult the complementary Workshop Brief developed as part of this toolkit for more information about the workshop.</p>
FORMAT	Guided dialogue in small peer groups
COMPLEMENTARY DOCUMENTATION	Fostering Research Collaborations Slide Deck

PURPOSE

The purpose of this activity is to simulate an initial meeting between a researcher (e.g. a graduate student or faculty member) and one or more potential partner organizations.

Researchers, and especially researchers with limited partnership experience, often struggle to identify the needs, challenges and opportunities that might emerge from collaborations with non-academic partners. This activity is designed to help researchers build strategies to have an initial conversation that lays the groundwork for a long-term relationship and to identify opportunities for reciprocal benefit.

This activity is relevant to early-career researchers (especially graduate students and postdocs) who wish to build or strengthen collaborations with non-academic organizations. While this activity was first rolled out with participants from the research community, it could apply to participants from different organizations.

TIME REQUIRED

Activity description (Part 1)	10 MINS
Independent completion of persona worksheets	15 MINS
Part 1: Coming to the Table	30 MINS
Break	10 MINS
Activity description (Part 2)	10 MINS
Part 2: Aligning with Partners	30 MINS
Group debrief	15 MINS
TOTAL TIME REQUIRED	2 HOURS

ACTIVITY DESCRIPTION

Breakout groups of 4-6 participants with activity worksheets. This scenario activity is designed to follow the “Overview of Knowledge Exchange” presentation (see slide deck), which includes a section about how to reach alignment with one or more potential partners, collaborators and stakeholders in order to proceed with a research collaboration.

The activity asks participants to take on the roles of personas.

The original activity centered on a scenario in which a researcher persona invited a set of potential partners, collaborators and stakeholders to discuss ideas to redesign the school lunch program at a fictive elementary school.

Your activity may use this example, or you may choose to design an alternative scenario that is more relevant to your context.

In addition to being assigned persona roles, consider asking all participants to take on participatory responsibilities during the activity. The table below provides an example based on the original activity.

	Scenario Persona	Structural Role in the Activity
1	Researcher	Participant volunteer to lead discussion
2	Parent	Debrief reporter
3	Deputy Minister	Notetaker A – add notes to the shared screen
4	School Principal	Secondary facilitator to keep conversation on track
5	Teacher	Timekeeper and chat box watcher
6	Industry Partner	Notetaker B – add notes to the shared screen

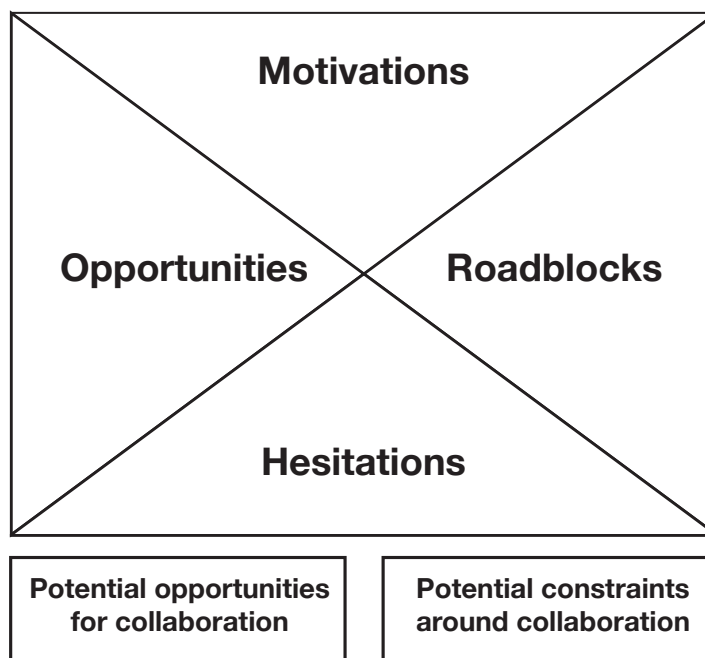
**ACTIVITY
DESCRIPTION
(CONTINUED)**

In particular, the participant who adopts the “researcher” persona will build facilitation skills and learn how to employ empathy and intellectual curiosity in order to honor other perspectives and forms of expertise. Other participants will gain similar lessons from the perspective of someone without a research background, and they will develop a more tailored sense of the challenges and motivations that non-academics can face in their own professional contexts.

Throughout both parts of this activity, one participant (the “researcher” persona) is responsible for facilitating the conversation and understanding the needs and perspectives of the other personas. The facilitator provides each participant with a high-level idea of their persona and then 15 minutes to imagine their individual persona’s goals, perspective, and motivations before starting the interactive activity.

Part 1 of this activity focuses on asking open-ended questions to uncover the perspectives of others—proceeding in the spirit of discovery and empathy rather than “problem solving” without context. The “researcher” persona leads the discussion, and participants are directed to have a dialogue that foregrounds questions to open up the perspectives, motivations, hesitations, constraints, and objectives that each persona may be facing. (This topic integrated into the Kx Overview presentation.)

In the original activity, for example, the Teacher persona contended with an already demanding schedule and a number of other professional demands. We used the following empathy map to drive this component of the activity. If you prefer, you may choose to use another diagram such as the Knowledge to Action Cycle diagram, provided in the accompanying slide deck.



ACTIVITY DESCRIPTION (CONTINUED)

In Part 2 of this activity, the Researcher asks each persona around the table what success would look like from their perspective. The notetakers record the answers on a shared virtual space and focuses on the personas coming to a consensus around shared goals, expectations, and next steps. After this brief conversation, the participants get out of their roles and work together to determine a research question that will enable success according to all of the considerations on screen. To wrap up, the facilitator leads a debrief by asking the same persona from each small group (someone other than the “researcher” persona) to sum up the group’s resolutions.

KEY LEARNING CONCEPTS:

- Strategies for initiating a conversation with partners, collaborators and stakeholders
- Importance of clarity around intentions, roles, and responsibilities

MATERIALS NEEDED:

- Scenario description (printed copies or laptop and projector)
- 4-6 persona worksheets (printed copies; see below)
- Large paper post-its
- Markers

ASSOCIATED SESSIONS:

- Overview of Knowledge Exchange
- Presentation by a Guest Speaker (e.g., Assistant Professor or Community Partner)
- Expert Panel

REQUIRED PREPARATION:

- Facilitator will need to prepare scenario and persona worksheets
- No preparation in advance required for participants
- Groups of 5-6 participants need to be planned in advance
- Facilitator may wish to invite one participant per group to volunteer in advance to be the discussion leader

**PERSONA
TEMPLATE**

The facilitator will need to develop a brief (100-200 word) scenario in which a researcher has gathered 3-5 potential partners, collaborators and stakeholders to discuss a potential research opportunity. For example, the first version of this activity centered on an idea to redesign a fictional elementary school's school lunch program. The facilitator may use the template below to develop these personas.

At the beginning of the activity, the facilitator asks each participant in his group to fill out the persona template. The template will help the participant imagine his/her persona's story.

Persona Name: _____

Persona Organization: _____

Persona Role: _____

Persona Descriptions (200-300 words) contain the following elements:

1. What does this person's role entail?
2. What are their motivations for participating in this conversation?
3. What challenges do they foresee?
4. To whom are they accountable?

Please imagine and write responses to the following for your persona:

Your life story

Identify 2-3 life experiences that have shaped your persona?

What matters to you

What are the 2-3 things that matter most in life to your persona?

Your frustrations

What are the 2 things that your persona finds most frustrating?

Summary sentence

In one sentence, summarize your persona's state of mind.