INTERNAL TOOLKIT:
STAKEHOLDER ENGAGEMENT
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Executive Summary

This toolkit is intended to be a support when it comes to engaging stakeholders in Biodiversa+. It details the SH approach led by the WP7, and the avenues for engagement (sections 1 and 2). It also gives practical steps to follow internally when it comes to mobilising stakeholders within a Biodiversa+ activity (section 3).

In Biodiversa+, there are 4 main avenues for the engagement of stakeholders: the Advisory Board, the Enlarged Stakeholder Board, the Biome and the Key collaborations. Other non-categorised stakeholders are still also engaged and tracked within Biodiversa+.

The stakeholder engagement of Biodiversa+ is led by the WP7, and this toolkit aims at detailing what are the best practices for engaging as well as providing some tools developed by the WP7. Mostly, the lead for engagement is at the WP7 level, and all engagement must be done at the OT level for consistency, tracking and reporting, and to increase the success for engagement.

Some tools have been developed to support SHE:

- **A checklist** for mobilisation: to use anytime there is a need for mobilisation within an activity when asking for stakeholder mobilisation, to make sure all relevant details are given (e.g; type of needs, link to relevant documents...)

- **Support template tracker**: this template is to be used when you organise an activity (e.g. event, workshop, etc.) to track the mobilisation of participants in a consistent way for the Partnership with their key details, including their contact and their interests. This tracker is automated with the classification used in the SH mapping.

- **SH mobilisation timeline**: this is a timeline developed with the OT/CT, currently shared with AB and ESB members. Through this timeline, they have an overview of upcoming opportunities for them and may flag the ones they are interested in participating in. This information is also key for WP7 stakeholder management to not over-mobilise some stakeholders and avoid SH fatigue. Thus, it is a useful tool to strengthen the mobilisation of SH in your respective activities.

You can contact Julia BETHE (Julia.bethe@fondationbiodiversite.fr) and Frédéric LEMAITRE (frederic.lemaitre@fondationbiodiversite.fr) any time with questions as regards SH mobilisation. *Do not hesitate to do so!*
1. What is a stakeholder in Biodiversa+?

A stakeholder is academic and non-academic organisations or people that have stakes related to R&I on biodiversity, ecosystem services and Nature-Based Solutions. The stakeholders within Biodiversa+ may have shared active interest in our work, or be on our radar or not. The engagement of stakeholders can be of different levels and forms: from informed to full collaboration towards Biodiversa+ goals and/or activities.

In Biodiversa+, most stakeholders actively engaged are in the **Enlarged Stakeholder Board (ESB)**. Many other forms of engagement exist within the Partnership, with various levels and intensities of engagement (from key collaborations to lighter engagement within the Biome).

2. Avenues for engagement

**Biodiversa+ approaches for engagement**

4 avenues for engagement

<table>
<thead>
<tr>
<th>Biome</th>
<th>Enlarged Stakeholder Board</th>
<th>Advisory Board</th>
<th>Key collaborators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Consultation</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Involvement</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
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<tr>
<td>Collaboration</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

There are 4 main channels for engagement in Biodiversa+: Enlarged stakeholder board (ESB), Advisory board (AB), key collaborations and the Biome.

The composition of the ESB and AB, and the engagement of Key collaborators are public (i.e. on Biodiversa+ website), to get transparency and avoid COI. They also publicly support the Partnership’s objectives.
On the other side, anyone can join the Biome without needing to support the Partnership objectives. The list of members is not public.

2.1 Enlarged Stakeholder Board (ESB)

Biodiversa+ engages with stakeholders throughout its activities. The active follow-up and engagement in the Partnership’s activities by stakeholders are centralised around the Enlarged Stakeholder Board. It allows accounting for a broad range of views from non-academic stakeholders in the field of biodiversity, ecosystem services and Nature-Based Solutions research and innovation in designing and implementing Biodiversa+ activities, reinforcing their relevance and added value and promoting the uptake of Biodiversa+ outputs.

ESB members are organisations grouped in 6 thematic colleges. The mandate of members started with the first annual meeting of the ESB (30th March 2022) and will end in September 2025. The nomination is to organisations, which have all committed to support the Partnership’s objectives and the implementation of the European Biodiversity Strategy for 2030 by building the bridge between science, policy and practice (including no net loss of biodiversity).

The ESB meets 1 time a year at least, with ad hoc meetings of thematic working groups to be planned. The ESB is consulted more closely/generally on the partnership’s activities. The members are also involved in activities and can influence these via joint positions carried through the AB.

Each 6 colleges have elected a representative that seats at the AB. The colleges are:

- Boundary organisations (science/policy)
- Economic and industrial activities (including representatives from private companies and industries from the main economic sectors concerned by biodiversity issues)
- European policymakers or advisors (including European Commission representatives from different DGs (de facto, DG R&I and DG ENV will be included), members of the European Parliament, etc.)
- Habitats, species and nature conservation (including major initiatives in the field of conservation and protection of biodiversity)
- Relations with the Public (including organisations dealing with citizen science, science, media, popularisation for the general public, etc.)
- Wild and domestic genetic resources

The composition of the ESB is detailed on this webpage. The ESB is currently chaired by Claire Brown (UNEP-WCMC), also co-chair of the Advisory Board.
Each college elected a representative and an alternate, with an individual mandate, to seat at the Advisory Board. These stakeholder AB members carry the positions and discussions from the ESB to the AB and therefore the GA as they are also attending Biodiversa+ General Assembly on behalf of the AB.

The ESB meets at least once a year around April for 2 days. Ad hoc meetings and other similar engagements of the board can be scheduled as well throughout the year.

### 2.2 Advisory Board (AB)

It is composed of both scientists and non-academic stakeholders. It ensures that a broad range of views from researchers and stakeholders are carefully accounted for.

The Biodiversa+ Advisory Board brings together perspectives from academic and non-academic stakeholders. It provides advice and suggestions on the strategy and implementation of Biodiversa+, including inputs on possible flagship programmes for consideration by Biodiversa+ members. The Advisory Board also channels advice and suggestions from the Enlarged Stakeholder Board (ESB) to build on broader stakeholder views and needs.

It is consulted on the strategy of Biodiversa+, on main documents produced, reviews outputs and impacts of the Partnership, and suggests ways of improvement and development. It also contributes to the dissemination of information related to Biodiversa+ between relevant scientific bodies and stakeholders.

This Board is composed of six scientific members appointed by the Biodiversa+ General Assembly, one representative and one substitute per ESB college (i.e. 6 representatives and 6 substitutes). The Chair
of the Advisory Board (currently Andras Baldi) is appointed by Biodiversa+ Partners, while the Chair of the ESB (currently Claire Brown) becomes the Vice-Chair Advisory Board.

The AB meets at least 2 times a year and can also meet on a voluntary basis for ad hoc meetings on specific targeted topics. AB members are also engaged based on interest in specific projects and activities.

2.3 Key collaborators

- **What is it?**

The key collaborators are directly engaged by the partnership for a specific collaboration, to the extent of involvement or collaboration at the task/work package level. Key collaborators can very well in parallel be members of the Biome or the ESB.

The “key collaborator” name refers to a status given to an organisation in a key collaboration with Biodiversa+, publicly advertised as such on Biodiversa+ website, after signing a letter of collaboration that frames the general terms of the collaboration, including the activities planned, expected inputs and outputs, related communication, and financial agreements if any, on a win-win basis.

The key collaborator:

- Contributes to strategic objectives, tasks and/or work packages activities;
- Gets recurrent engagement and close involvement/collaboration in the task implementation
- Agrees on mutual communication efforts

The main advantages of setting up a key collaboration for Biodiversa+ are the co-implementation of activities with strategic partners, the clear layout of areas and objectives of collaboration and allowing for joint and coordinated communication on collaborations.

- **New key collaborators**

Onboarding a new key collaborator will be done jointly with the WP7, the Coordination Team and lead(s) of the tasks/WPs. A close follow-up is also organised with the communication team as there is a public advertisement of the activities achieved through the collaboration.

Once the future key collaborator is identified, there are some mandatory steps to follow:

1) Formal approval of the GA to explore such collaboration with an identified organisation and to sign a letter of collaboration
The content of the foreseen collaboration is to be presented with the GA (i.e. potential workstreams, activities, communication, expected outcomes and documents etc.)

2) Work with the future collaborator on the content of the letter, that will be approved by the Executive Board on Biodiversa+ side

3) Signature of the letter by both parties. On the Biodiversa+ side, the Chair is signing such an agreement

2.4 The Biome

The Biome is based on regular informative engagement and ad hoc consultations of stakeholders, when these are relevant to the specific interests stated by members of the Biome upon registration. It is an open-ended group for stakeholders that wish to engage lightly with the partnership. The Biome can be joined by signing up online through the registration form or through personal invitation.

In practice, the Biome members receive 2 executive summaries a year that includes: overview of progress in implementing Biodiversa+ and of accessible productions, a calendar of upcoming activities and main foreseen opportunities to engage, and some selected “news from the Biome” showcasing relevant news from Biome members. Ad hoc opportunities for tailored engagement are also shared, based on interests and will to engage in Biodiversa+ activities. The group is managed and mobilised jointly with the communications team.

The Biome is complementary to the Biodiversa+ mailing list by being geared towards fostering stronger engagement in Biodiversa+, an overview approach to presenting Biodiversa+ and more targeted engagement. In short, it is for stakeholders willing to engage with Biodversa+ and wanting to go beyond the level of being informed.

3. Working with and engaging SH

The WP7 stakeholder engagement leads and tracks Biodiversa+ engagement towards stakeholders. The WP7 is also reporting on SHE of Biodiversa+, meaning that consistent tracking must be done at all scales of activities.

3.1 What is your role?
A stakeholder’s engagement can be done at any level of Biodiversa+, but the leading role and the involvement of specific internal processes must be followed.

For any mobilisations when you are leading an activity, there is a preliminary checklist you can follow to make sure you are not missing any key part of the stakeholder mobilisation. This checklist will be helpful to make sure the support provided fits your needs and respond to it in the swiftest way possible.

It then implies different action points from the WP7 as detailed below.

If you are a task lead or a WP lead, and not leading the activity, please make sure that the WP7 is involved appropriately.

At the OT/CT level, a direct connection with WP7 can be done and the most efficient steps to follow will be assessed accordingly.

Should you have any questions on the process or need clarifications, you can refer to the OT member covering your task or directly with WP7. Do not hesitate to do so!

If you are leading an activity that requests any form of mobilisation of stakeholders, individual expert level or as a group, you will need to follow the steps below (checklist).
**CHECKLIST:**

This checklist is to be used as a support any time you need to mobilise stakeholder, and therefore to contact the WP7.

<table>
<thead>
<tr>
<th><strong>Your details</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Name</td>
</tr>
<tr>
<td>• Organisation</td>
</tr>
<tr>
<td>• WP/task related to the demand</td>
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</table>

<table>
<thead>
<tr>
<th><strong>Request/activity</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Name and type of the activity requiring SH mobilisation</td>
</tr>
<tr>
<td>• Details of the activity: <em>a concept note can directly be shared if you already have one</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Details of the request</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• What is the need in terms of SH mobilisation?</td>
</tr>
<tr>
<td>• What is your timeline currently foreseen?</td>
</tr>
<tr>
<td>• If already known: type and level of mobilisation sought, SH group targeted and/or in mind</td>
</tr>
<tr>
<td>• <em>To help you with this part, you can ask yourself several questions: think the type of mobilisation you are looking for, the level of this mobilisation and which SH group you are targeting, as well as when in your project timeline this mobilisation will fit the best</em></td>
</tr>
</tbody>
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<tr>
<th><strong>AOB</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Add any details you wish to add in your request</td>
</tr>
<tr>
<td>• Do not hesitate to be exhaustive, we’re here to support at best!</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Do you have uncertainties in your request?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Do not hesitate to precise that in your email</td>
</tr>
<tr>
<td>• WP7 will happily support you in finding out the best suited mobilisation based on your needs</td>
</tr>
</tbody>
</table>
3.2 Mobilisation of the Biodiversa+ boards (AB and ESB)

The AB and ESB are usually highly mobilised on Biodiversa+ activities throughout the year. The members are informed in advance of Biodiversa+ activities and potential mobilisation.

Do you wish to mobilise the AB/ESB or some members of these boards? You can follow the steps below:

1) Set up the need on your side (why and what for the SH are mobilised?)
   - What type of input is needed?
   - At what stage of the activity will it be needed?
   - Are you seeking individual/expert input or the board’s input?

2) Contact WP7 as early as possible
   - Use the checklist for the first contact email
     - Detail the need for mobilisation and the activity details to help us understand the need and loop in the best-fitted members
     - If possible, share your timeline: date(s) of the activity, deadline for e.g. application, consultation….
     - This helps WP7 to plan the mobilisation ahead and support it, with the mobilisation schedule in mind to not overwhelm the members

3) WP7 is the lead in contacting the AB and ESB members
   - You must send your documents (e.g. agenda, invitation letters, consultations, drafts for review etc.) to be shared by WP7 with members
   - WP7 is sending the invitation, or if it is not possible, the operational team officer following the activity will be sending the invitation (this procedure aims to not dilute the mobilisations from one activity to another)

4) A follow-up is set in place
   - Even if WP7 is leading the contact with the AB/ESB members, you will be designated as the main contact person for the activity and the follow-up
   - WP7 is tracking the mobilisation of the board, so it is crucial to have some key information:
     - The members that received an engagement/mobilisation request
     - the ESB members that responded to be interested in the engagement (e.g. registered to a workshop)
     - the members that participated in the activity (e.g. attended the workshop, responded to a consultation)
   - To help with tracking, you can send WP7 the link to your tracking document for instance.
   You can find a reporting document template below (section v. [here](#))
3.3 Mobilisation of key collaborators

- **A new key collaborator**

The engagement of a new key collaborator is to be discussed with the WP7 and the CT prior to communicating about potential key collaborations with third parties to Biodiversa+, to assess the need for such a collaboration. The WP/Task lead is leading the discussions on this.

Formal approval from the GA is needed to start engaging in new key collaborations, sharing the foreseen benefits of such collaboration and which activities/tasks will be related.

This is embedded in what is a key collaborator for Biodiversa+ (see above section 2.3)

- **Current key collaborators**

The responsibility for the key collaborators’ mobilisation is to the WP/task lead. There is a close follow-up from WP7 and WP6 (communication) that is done for respectively the reporting and communication on the collaboration activities and outcomes.

3.4 Mobilisation of the Biome

As the Biome list is not public, the mobilisation of this group goes mostly through the biannual newsletter or ad hoc engagement based on shared interests. The WP7 is leading the mobilisation of the Biome and its members.

To engage with the Biome, on a specific activity as part of a general mobilisation of stakeholders, you will also need to contact WP7 detailing your request, based on the checklist.

Depending on what you need in terms of engagement, different options can be considered:

- **For general engagement** (i.e. all Biome members):
  - You can either wait for the biannual newsletter to share the mobilisation opportunity or ask for direct *ad hoc* engagement if possible (i.e. timely in terms of engagement), the mobilisation will be made using the Biome member list

- **For tailored engagement** (i.e. not all members but some specific ones):
  - Biome members are asked to share specific interests they have in Biodiversa+ work, topics they wish to be specifically mobilised on and their expertise/sector of work. Based on this information a tailored engagement of stakeholders can be conducted.
  - To help identify the most fitted stakeholders, you need to detail which SH you are looking for as well as the activity, and if possible your timeline for the mobilisation in the form
For both types of mobilisation, you must send your documents (e.g. agenda, invitation letters, consultations, drafts for review etc.) to the WP7 that will initially share the invitation to members. WP7 is sending the invitation that you have pre-written, or if it is not possible, the operational team officer following the activity will be sending the invitation. You will be designated as the main contact person to follow up once the initial invitation is sent.

The demand for mobilisation, to be as successful as possible, needs to be done as early as possible in your timeline.

### 3.5 Mobilisation of other SH not from the groups above

During activities such as workshops, you may engage stakeholders that are already in the active range of the Partnership or that are new.

- Use the checklist to request SH mobilisation to WP7 or any other related support

All external invitations to Biodiversa events should initially be sent by OT, to ensure the ability for coordination and follow-up, and that we are consistent in relation to the relevant people in each organisation.

This means that for stakeholders not in the groups mentioned above (namely AB, ESB, Biome and key collaboration), the engagement is led by the OT officers if not agreed differently. This also helps track the mobilisation in a more consistent way.

### 3.6 Tracking mobilisation

The reporting on SH is the responsibility of the WP7. However, to keep consistency and help you keep track of the participation in your activities, a template tracker for activities and events has been developed, using categories and classifications developed on SH mobilisation.

When leading an activity, you may use this document, or copy the categories in your own tracking document to record the mobilisation of the SH in the frame of your project/activity.

**How to use the template?**

- Make a copy of the empty document before modifying it
- Fill in the general information
- Fill the detailed table to keep track of your activity organisation. You can adapt the table to your needs, but the categories must be kept for record purposes
- Share the document with WP7 for SH mobilisation tracking. You can make your table anonymous by removing the personal details of the stakeholders.
In the end, this document needs to be shared with WP7 which has the responsibility to record SH mobilisation in Biodiversa+.

- **Stakeholder activity participants tracker**

### 3.7 Tools to help you with stakeholders mobilization

**SH mobilisation checklist**

Anytime you wish to request a SH mobilisation support, this implies to contact WP7. The check list is to make sure you have all the elements in your contact email. In the checklist, you will also find some guiding questions to ask yourself to frame your need on SH.

If you have uncertainties about your request and the mobilisation of SH for your activity, and cannot give all the checklist elements, do not hesitate to say it and seek for WP7 support on that matter.

- **Checklist: see page 9 of the toolkit**

This checklist is a support to be used anytime there is a need to mobilise a SH or a group of SH. This will help WP7 to provide the quickest and most efficient support in SH mobilisation.

**Support template for reporting on SHE:**

The document can be found clicking on the link here: [https://www.dropbox.com/scl/fi/dhjmmt139qfnxyyzi6mx/TEMPLATE-SHE-tracker-participants-activities-and-events.xlsx?rlkey=qloqv85shqae9flw7t3kxi&dl=0](https://www.dropbox.com/scl/fi/dhjmmt139qfnxyyzi6mx/TEMPLATE-SHE-tracker-participants-activities-and-events.xlsx?rlkey=qloqv85shqae9flw7t3kxi&dl=0)

This document includes a list of categories, used in a systematic way in Biodiversa+, that can be helpful for e.g. registration forms, polls etc.

The details on how to use the template is in section 3.6.

**List of foreseen mobilisation for AB and ESB:**

Access the document here: [https://docs.google.com/spreadsheets/d/1nsJwQpipWWQ0LWVMS-nG4kVZndYyYgPI/edit#gid=230377103](https://docs.google.com/spreadsheets/d/1nsJwQpipWWQ0LWVMS-nG4kVZndYyYgPI/edit#gid=230377103)

This document is planned to be a lively tool, evolving based on activities development and needs. This is an overview of what is expected in terms of mobilisation of the board. It is also shared with board members so that they can flag their interest and see when other board members are mobilised throughout the year. It is also a great overview of the impact of the boards in the Partnership.
The list of activities is categorised per flagships on which the ESB/AB will likely be mobilised, at the individual or organisation level. At a later stage, once shared with the ESB and AB members, this list will be used for:

- **For board members:**
  - flagging upcoming opportunities and foreseen level of mobilisation for members > i.e. members know in advance some activities they may be asked to participate in, helping them to anticipate and know the amount of potential work required from us (half a day, several days for an in person meeting etc.)
  - understand the level of impact they can have on activities and at what stage > i.e. from early co-design to only co-dissemination
  - Flag an interest they have on a specific topic and/or activity that will happen in Biodiversa+

- **For Biodiversa+**
  - Better target interested members on specific activities
  - Increase positive answer when board members are mobilised by your WPs
  - (for WP7) anticipate at best when mobilisation will be needed
  - Help record and report on the mobilisation
  - Improve balance in mobilisation > i.e. make sure that members are equally mobilised, and that there are only few gaps in mobilisation

- END OF DOCUMENT -