

External Review Response

Proposed Actions/Response



Recommendation 1

Reflect on accomplishments and revisit the strategy

This evaluation shows that the Belmont Forum is relevant and achieving (very) good results in an efficient manner. The Belmont Forum should consider the results of this evaluation as an encouragement to build on what is already achieved and continue to initiate and support

international transdisciplinary research providing knowledge for understanding, mitigating and adapting to global environmental change.

We welcome this recommendation

Recommendation 2

Review priorities and set unified goals

At this point there is a need to discuss whether all members are still in agreement with the Belmont Forum's mission and ensure a common agreement of the appropriate way forward. The following questions should be considered to (re)create strategic alignment of members:
2.1 What objectives should the Forum pursue? Should there be more focus, or less?
2.2 What more can be done to include more member organizations and more researchers from the

Global South? 2.3 What more can be done to encourage the use of research results from the CRAs?

The common agreement resulting from the discussion should be operationalized and reflected in the Forum's mission, objectives, and in the formulation of CRAs.

Accept Recommendation and take forward

Recommendation 3

Address capacity issues

The growth in members and activities demands on the Secretariat have also increased, and the Secretariat is understaffed to meet up to the ambitions/expectations. We suggest increasing the capacity of the Secretariat to 5–6 FTE staff members.

BF Notes the Recommendation

Assessment of staffing needs to be made regularly! We encourage members to actively support the secretariat through membership contributions, staff time and other in-kind contributions.

Recommendation 4

Scale-match resources

To bring the Secretariat to the level of 5-6 FTE, more resources are needed (either cash or in kind) to cover these costs. To afford this, either an increase in membership fees or an increase in the number of members (or other financial contributors) are necessary.

The alternative is a serious reduction in tasks for the Secretariat, which would either mean a serious reduction in the ambition levels of the Belmont Forum and/or a transfer of tasks presently done by the Secretariat to member organizations.



BF Notes the Recommendation

We recognize that this plays into vision about fit for purpose (recommendations 1&2) and capacity issues (recommendation 3)

BF will look for an integrated approach to finding ways for members to contribute to BF to enhance efficiency and resources/person power - taking a multi-pronged approach.

Recommendation 5

Improve organizational transparency and efficiency

More explicit prioritization of activities of the Secretariat is needed. We suggest addressing this with a more explicit annual planning cycle, with short, to the point, annual work plans with clear priorities, annual reporting to the Plenary Meeting, empowering the Secretariat director to implement these annual plans, financial and progress reporting in every SC meeting, and an active interaction between SC/co-chairs and Secretariat. The more explicit steering should also include an annual assessment of the performance of the Secretariat Director by the co-chairs and annual accountants approved by an external accountant.



Accept the recommendation

While noting the need to keep within the operational structure of the BF improvement and optimization of process (operation and strategy mixed together).

Continuous improvement is a priority of the BF. We concur with the needs expressed through this recommendation, while recognizing that the specific recommendations/suggestions are not feasible based on the operational structure of the organization.

Recommendation 6

Increase visibility and uptake

Although there is already strong communication of research results, there seems room to further boost the online visibility and uptake of both BF publications and non-journal outputs. In case the Belmont Forum decides to increase the capacity of the Secretariat, and a dedicated communications officer is appointed, s/he may have this as one of her/his tasks. Developing "outcomes narratives" for each project and presenting them in annual reports, valorization reports, a dedicated section of the Belmont Forum

website, and/or on specialized platforms such as Kudos or researchfish would increase exposure and, consequently, impact.

Accept the recommendation

Agree need to increase V&U will explore further and identifying ways to do this - very tied to 3&4

Some initial Actions (pulled from the Plenary 2020 breakout group discussions) to consider towards engagement with the external reviews recommendations include:

Revisit Belmont Forum Strategy

ACTIONS

The BF is guided by the Belmont Challenge (BC) vision document which was last revised in 2016. While there is agreement that this document, and the overall BF vision are still seen as current and relevant to the members views of the mission of the BF, there is room to take the time to revisit the document and see if any revisions need to be made to ensure, and to reaffirm membership commitments to the BC. In order to do this the BF Secretariat proposes to strike an ad-hoc BF vision/strategy committee from BF members, and invited partners, to review the existing documents with the new BF Executive Director. This committee would work with the community to make suggestions and updates and ensure that the BF member community is aligned in its vision and goals for engagement with the BF and the BC. This document, once agreed, would continue to act as the steering mechanism for the ongoing work of the BF.

In addition to this, the BF Co-chairs and ED will be tasked with developing a 3-6 year strategy document that would address a more immediate future goals of the BF - and will set out new new BF ED's vision over the course of her term, and will become part of the BF process with each new incoming 3-6 year ED term.

This responds to recommendations 1, 2, 4 and 5

Targeted Timeframes¹

Ad-hock Committee to be struck following BF Plenary 2022 to explore issues of vision/strategy

BF visioning & community workshop/scoping activities (Q1&2 2023)

Draft of revision to be circulated to BF Members for comment in Q3 2023, for discussion and approval at plenary 2023.

Draft 3-6 year strategy to be ready for initial discussion at the BF Members Meeting at SRI 2022.

¹ Targeted timeframes may shift due to prioritization, opportunity and availability of BF members to take on leadership roles on many of the individual items.

Engagement with the Global South/Low and middle income countries (LMIC)

ACTIONS

The barriers to engaging with the Global South are seen as being two fold - one being financial and one with capacity building.

To address these barriers, Belmont Forum will work to develop its network to include more engagement and membership from development agencies. To this end, the new BF ED will be tasked with prioritizing network/relationship development with partners from development agencies, and other groups/organizations with complimentary stakeholder bases, and aligning research priorities/goals.

The BF will identify regional champions from within its membership and use existing networks to help address specific issues pertaining to the global south.

- Specifically this can include greater engagement with IAI networks within Latin America and the Caribbean, and working with START and Future Earth to leverage their networks in LMICs.

Increase engagement from early career researchers (ECR) and researchers from LMIC:

- To help foster the next generation of sustainability and transdisciplinary scientists. BF is currently working on a Collaborative Initiative (led by NSF) called Future Leaders that will build on the Future Earth Global Sustainability Scholars program, as well as other existing training programs and fellowships that BF members support, to increase international, transdisciplinary training in a more holistic way. This initiative will be expanded to ensure a good representation of BF membership. This will support capacity building activities and leadership development in low and middle income countries (LMIC).
- BF will participate in the IAI-STeP program, or other similar programs - and bring on Fellows to support the work of the secretariat (budgets permitting).
- BF will support (budgets permitting) and promote the participation of ECRs from LMIC at the SRI Congress events (this action was already taken in 2021 in the form of scholarships for registration).

This responds to recommendations 2, 3 and 4

Build on and further develop BF's Open Data policy

ACTIONS

BF's open data policy has allowed other funders to experience the process and potentially bring back that knowledge for implementation in their own organizations. The next step of implementation may be to provide targeted support and incentives to organizations who make open access a priority. Open data will remain a priority for BF and further steps are needed to implement the recommendations of the E-infrastructure teams.

In order to achieve this, the BF will continue to engage with international partners, including Future Earth, the International Science Council (ISC), the Inter-American Institute for Global Change Research (IAI), START and others to continue to take this global discussion forward. BF will strive to continue to lead by example, and play an active role in this global discussion.

This responds to recommendations 2, 6

Targeted Timeframes¹

Transdisciplinarity is key

ACTIONS

The Belmont Forum recognizes the demand for transdisciplinary (TD) research from the international science and policy communities and is thus working to lead the current flux of TD research. We recognize that fundamental research is vital, but we also acknowledge and accept that to make meaningful societal impacts it needs to go beyond that. Knowledge into action.

To this end, BF will work with partners to develop inclusive materials and opportunities for Transdisciplinary training. Transdisciplinary training will be included as part of the annual BF SRI offer (in person, virtual, and/or hybrid). BF will encourage BF funded researchers and their staff and students to participate in existing training opportunities that have been developed by collaborators and partners (including the Massive Open Online Course (MOOC) "Partnering for Change: Link Research to Societal Challenges" that has been developed by the University of Basel. BF will also coordinate transdisciplinary training with CRA launch events to help researchers develop BF fundable projects.

BF will explore/pilot mechanisms and work with partners to help researchers develop transdisciplinary networks in advance of the opening of CRAs. BF will also explore best practice in the development of CRA coordination teams/activities in order to facilitate linkages between different projects within individual CRAs.

This responds to recommendations 2, 6

Targeted Timeframes¹

BF will work with partners to ensure that an annual TD training is made available annually at SRI the Congress

Aim for Quarterly TD training opportunities in collaboration with partners.

Working with partners to facilitate network development ahead of CRA launches.

Strong Foundations and Good Governance

ACTIONS

Belmont Forum recognizes the need for a strong stable foundation of trust, accountability and transparency. It recognizes the need to ensure that the public funding being provided to the secretariat, by members, for the delivery of its mandate is spent responsibly and in a transparent manner, and that procedures and policies are put into place to ensure that members have confidence in the governance of the organization.

To this end the BF Secretariat, under the leadership of its ED, will undertake a review and update of its existing policies and procedures, with the help of the BF Steering Committee (SC).

Additionally a small committee will be convened in order to go through the BF governance Terms of Reference (ToR) to specifically address membership and governance issues.

The SC would also be tasked with exploring options for increasing BF resources in order to effectively engage with recommendations 3 and 4 of the review.

This responds to recommendations 2,3, 4, 5

Targeted Timeframes¹

A small ad-hoc committee to be struck Q1 2022 to revise BF governance ToR

Revised governance ToR to be circulated to membership for comment in Q2 2022

For ratification and approval at BF Plenary 2022

Engagement with members and partners

ACTIONS

Engagement with members and partners is extremely important and something that should be further developed. Enticing membership of additional organizations would broaden the reach of Belmont Forum. Increasing the number of collective organizations, like the IAI, as partners and members - that have a collection of funders within their own membership - would help to increase the visibility of the BF and significantly broaden networks.

To this end BF will set up a membership and engagement committee which could help identify and build networks and further explore ways to increase engagement with members and partners including:

- Involving members and partners in committees (Visioning, Strategy and other ad-hoc committees) to increase involvement in the development and delivery of BF policies and processes.
- Developing mechanisms/options for engagement in/visibility of kickoff, mid-term, and end-term meetings.
- Inviting participation of CRA funders to these meetings
- Work/partner with like-minded organizations to develop CRA pre-scoping activities to bring together members and potential partners to identify aligned priorities and build foundations for future CRA opportunities.

This responds to recommendations 2, 3, 4, 5, 6

Targeted Timeframes¹

BF will identify 3-4 opportunities to work with members and partners on pre-scoping activities per year - aimed at developing networking spaces for members and potential partners to develop CRA ideas to take to plenary.

BF will aim to bring in the participation of 2 IAI member countries into BF planned CRAs by end of 2024

Communication, Visibility and Uptake

ACTIONS

BF agrees that increasing the visibility and uptake of BF projects is important in understanding how the BF is delivering on its vision and contributing to the Belmont challenge.

- Identifying flagship opportunities for showcasing BF research results/case studies:
 - Identify 2-3 events annually where a BF presence would have the greatest impact - invest resources to deliver (one of which should be the annual SRI Congress). Decide annual priority audiences (policy? Research? Public?)
- Develop materials/tool boxes to help enable researchers to engage with communications activities &/or policymakers i.e. Social Media promotion/kits
- Develop partnerships with like-minded communities to offer/develop training practical opportunities for researchers that are important for engagement at the science policy interface - science communication; transdisciplinarity (see above); Science-to-policy
- Use BF as a convener to bring together like-minded communities to further develop and disseminate research results
- Develop process/procedures for TPOs, Coordination teams and BF Secretariat to help track the delivery/success projects as they move forward and follow up 3-5 years after project wrap up.
- Explore/pilot mechanisms/options for increasing visibility for BF research and successes:
- Development and use of introductory and success story videos (to be built into the application process)
- CRA specific SM campaigns (in collaboration with TPOs and Coordination teams)
- When closing a CRA - working with TPOs, GPCs, members and partners to set up public valorization events Pecha Kutcha style where projects are invited to share their success with a relevant stakeholder audience

This responds to recommendations 6

Deliver competitive, nimble and meaningful activities

ACTIONS

The majority of BF activities have been competitive, but we continue to build on our strengths which include being nimble enough to deliver meaningful opportunities based on the scoping process and the needs of the international science community. This shows that the Belmont Forum is relevant, timely, innovative, and inclusive.

Engagement with policymakers, resource users and community stakeholders**ACTIONS**

Engagement with policymakers and research users is something that BF also needs to further develop in order to increase impact, visibility and to effectively integrate transdisciplinarity throughout the CRA process.

In order to engage with this, the BF Secretariat, with the new membership and engagement committee, will explore best practice and use this information to develop a stakeholder engagement strategy/roadmap to help create a targeted approach to engagement with all of BF's stakeholders throughout the transdisciplinary continuum, including members, partners, policy makers, resource users and community stakeholders.

This strategy will identify ways to bring in and engage all BF stakeholders throughout the CRA development, delivery, and valorization process - with special consideration for how we engage with and communicate the success of BF research projects.

This responds to recommendations 6
