ASIA AND THE PACIFIC

Regional Innovation Centre

UNDP

SENSEMAKING WORKSHOP
FACILITATOR GUIDE

Prepared for: Sensemaking Workshop Facilitators

About this Guide

What is it?

This Facilitator Guide is created by UNDP Asia-Pacific Regional Innovation Centre to guide teams through the process of running a Sensemaking workshop.

Complimentary resources

The Facilitator Guide is intended to be used in conjunction with:

- *UNDP Sensemaking Workshop Preparation Guide* which helps teams decide if they should run a Sensemaking workshop, and how to prepare for it.
- The **Sensemaking templates** to be completed as you conduct the exercise
- An **online workspace** tool (e.g. Miro or Mural) where participants map and share insights using sensemaking templates
- A **slide deck** which is used by the Facilitator to run the sensemaking workshop
- A workshop report template**,** which provides the outline and guiding notes for the post-workshop report

Acknowledgements

- Louise Skärvall, SDG Liaison Officer, UNDP Armenia, for co-authoring this guide.
- *UNDP Portfolio Sensemaking and Acceleration Protocol* was developed by Chôra Foundation (previously known as Axilo) for UNDP Asia-Pacific Regional Innovation Centre in 2019.

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Contact Us

If you have any question about this guide or process, please email:
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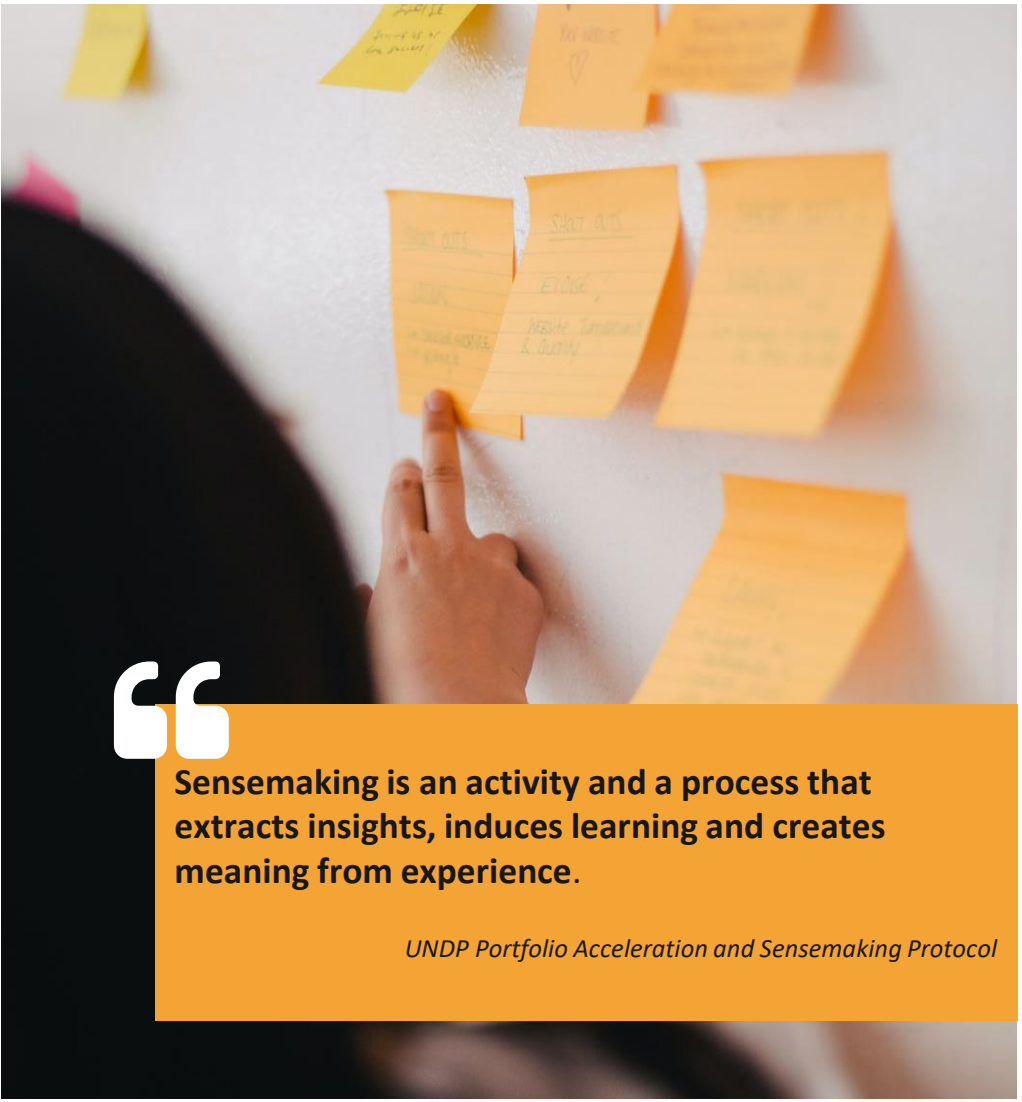
What is Sensemaking?



> **Sensemaking is an activity and a process that extracts insights, induces learning and creates meaning from experience.**
>
> *UNDP Portfolio Acceleration and Sensemaking Protocol*

Sensemaking as a process enables a team to reflect on their current portfolio of work, with the intention to maximize **impact** and **effectiveness** of their work by asking:

- **Why run this particular set of projects at this point in time?**
- **Are these projects relevant and coherent to the (current and/or emergent) needs of the industry or country or government(s)?**
- **How can we do more with our limited resources on the ground (e.g. funding, human resources, projects, relationships)?**

We do this by:

Observing & making sense of an existing portfolio of work (using a subset of 10-12 projects being run within your team)

Extracting insights & intelligence from the presented projects on their coherence and alignment with the organization's expressed intent , and

Creating an action plan using those insights and intelligence to change how we work so that we can accelerate the potential impact of the organization's current and pipeline portfolio.

01

SETTING UP YOUR WORKSHOP

SENSEMAKING

Participants: Roles & Responsibilities

Workshop day 1 has approximately 20-25 total participants (made up of technical + operational colleagues). See roles below.
Workshop days 2 and 3 have a smaller group of 8-10 participants (asked to stay on from Day 1)

You will need to appoint the following positions keeping one person per role:

Sensemaking Focal Point Role x 1-3

Co-designs and organizes the workshop, manages logistics and technology, and is ready to pitch in with facilitation. Participates all three days of the workshop, and with the support of senior management leads the post-workshop efforts to continue the work. Recommend colleagues be from Monitoring and Evaluation, Learning, Innovation teams.

Facilitator Role x number of projects

Gives a 5-minute presentation on a selected project using the Project Presentation template and answers any questions on Day 1. The presenters are expected to complete the template in advance. Some Presenters could be asked to participate all three days.

Listener Role x 8

Asks clarifying questions of all project presenters to draw out insights from the presentations on Day 1. Operates from a place of curiosity not judgement. Some Listeners could be asked to participate on the other two days as well.

Mapper Role x number of strategic themes

Listens to the presentations to capture relevant insights and recognize patterns across the projects using the respective window templates. Best suited for colleagues who are active listeners, can comfortably zoom in and out, identify patterns, and are quick on their feet. Mappers will be provided with their window topic and briefed in advance of the workshop. Mappers participate all three days.

Day 2 and Day 3 participants x 8-10

8-10 participants from Day 1 that continue for the rest of the workshop. Their responsibility is to go deeper on the patterns surfaced by the windows on Day 1, extrapolate what we are seeing from the 10-12 projects to the wider team portfolio, and knowing what we now know suggest what can be done differently to achieve the Statement of Intent. This smaller team comprises of the Window Mappers, senior management, focal point(s), and 2-3 other participants. Suggested profile of participants is those who are strategic, natural systems thinkers, can abstract, and comfortably zoom in and out.

We recommend consistent and engaged senior management participation throughout the process

Sensemaking Workshop Preparation & Agenda

	Pre-workshop	During the week prior to workshop	Sensemaking Workshop Day 1	Sensemaking Workshop Day 2 and 3	Post-workshop
Activity	**Design Workshop:** • Industry/Country context • Finalize the various inputs for the workshop (team identity and intent, windows and projects) • Identifying participants, and their role (project presenter, window mapper, listener), logistics	• Briefing with Head of Office regarding their opening remarks and review of the proposed team identity & intent (the sooner this is done with senior management, the better) • Briefing with Workshop Team to go over window mapping (Focal Point and Window Mappers)	• Set industry/country context • Discuss organizational identity and intent in the industry/country • Make sense of a portfolio of projects • Extract and map emerging insights	• Capture, sort and synthesize outputs from Day 1 of the workshop • Identify claims you can make about your portfolio, its coherence and alignment • Identify what you might want to do differently going forward to achieve greater cohesion and alignment	**Workshop follow up**: • Draft workshop intelligence report summarizing key insights, proposed next steps on what the team can do differently going forward • Plan to share the workshop and its findings broadly with colleagues for their engagement and buy-in with the recommendations
Time	**Start 4-6 weeks from your session (at minimum)**	**1 week before**	**Half-day session (approx. 4.5 - 5 hrs)**	**Two half-day sessions (approx. 4.5 hrs)**	**Wrap-up of the report within 2 weeks so broader work on actioning the next steps can begin**
Who	• Workshop Facilitator • Senior Management • Sensemaking Focal Point	• Workshop Facilitator • Head of Office • Focal Point Portfolio Mappers	• Workshop Facilitator(s) • Larger group of 20-25 participants including senior management	• Workshop Facilitator(s) • Smaller group of 8-10 attendees from Day 1 that stay on for Day 2 and 3	• Portfolio Team

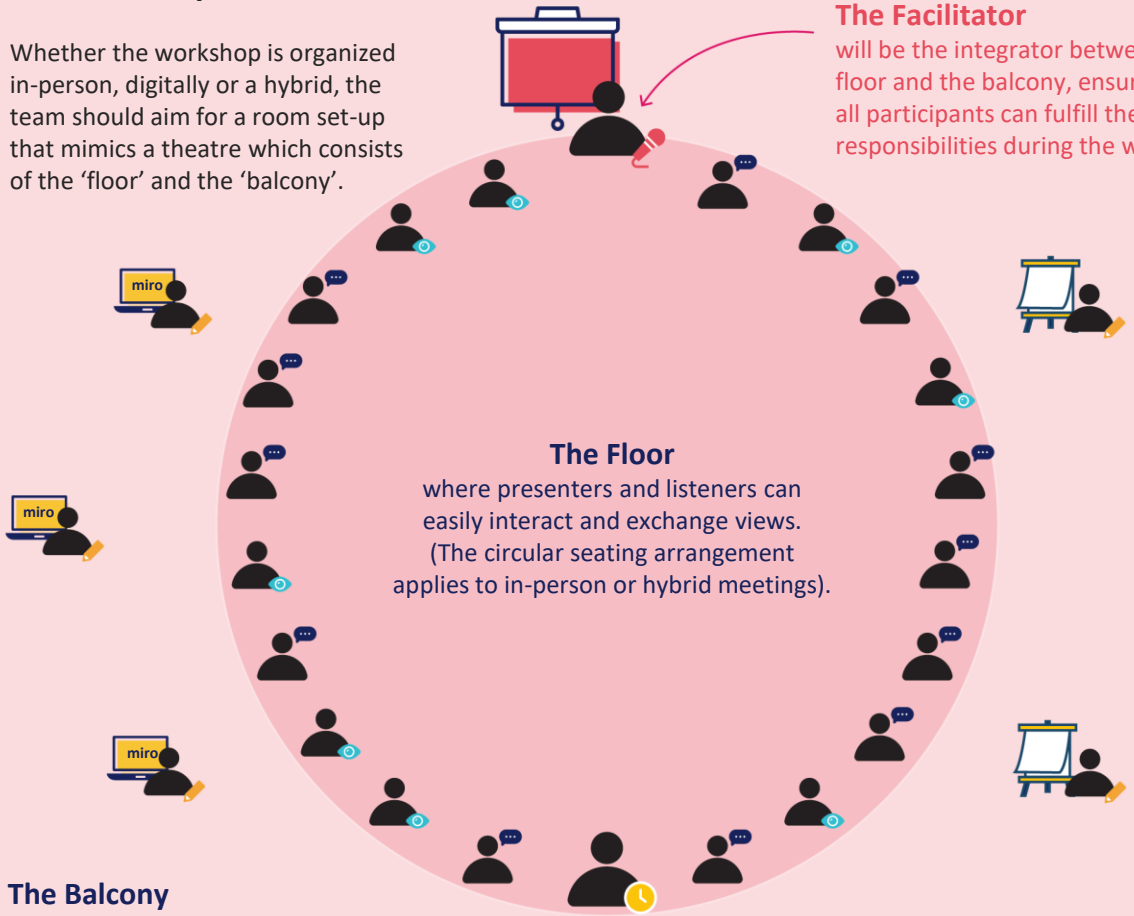
Workshop Day 1: Portfolio Sensemaking

Participants	Materials Required
Presenters 10-12	PowerPoint Presentation
Listeners 8	Facilitation Platform
Mappers 4-6 (1 per window)	Digital Workspace
Facilitator 1	In-person Workspace
Timekeeper 1	

Room Set-Up

Whether the workshop is organized in-person, digitally or a hybrid, the team should aim for a room set-up that mimics a theatre which consists of the 'floor' and the 'balcony'.

The Facilitator
will be the integrator between the floor and the balcony, ensuring that all participants can fulfill their role and responsibilities during the workshop.



The Floor
where presenters and listeners can easily interact and exchange views. (The circular seating arrangement applies to in-person or hybrid meetings).

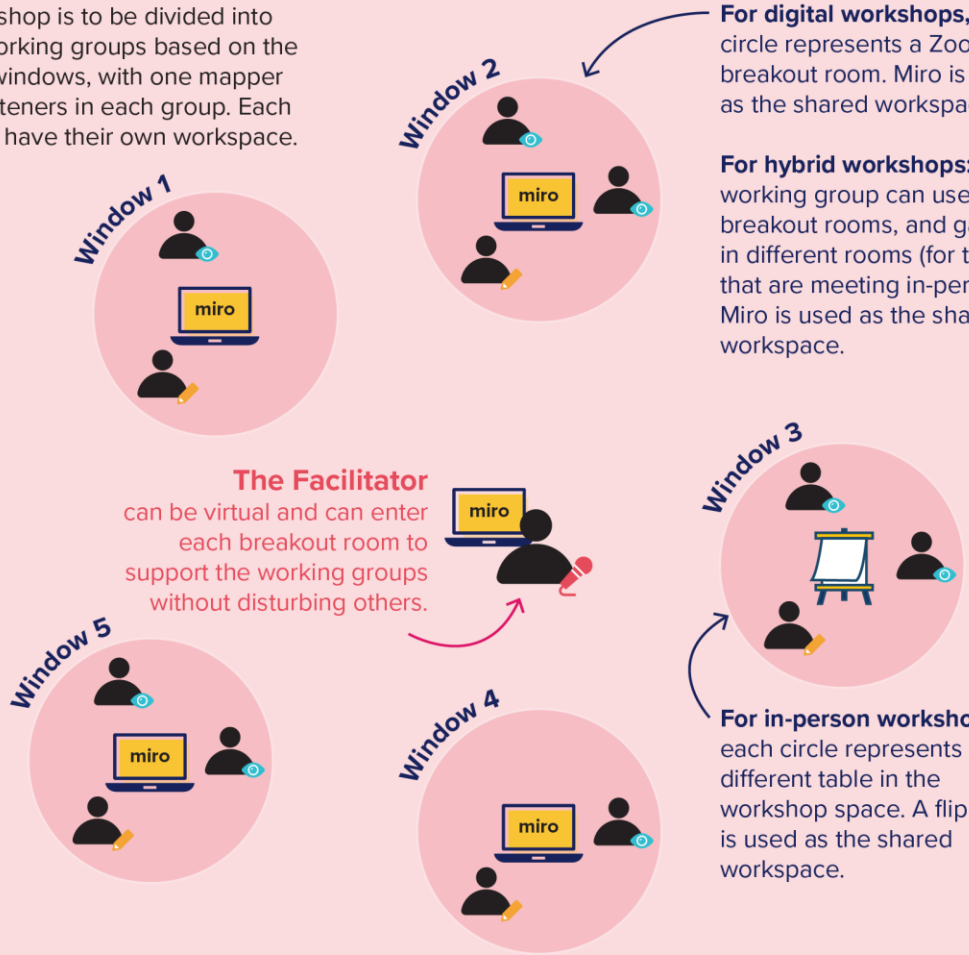
The Balcony
where mappers are observing the interactions.

Workshop Day 2 & 3: Portfolio Intelligence Generation

Participants	Materials Required
Listeners 8	**Powerpoint Presentation**
Mappers 4-6 (1 per window)	**zoom Facilitation Platform**
Facilitator 1	**zoom Digital Breakout Rooms**
	miro Digital Workspace
	In-person Workspace

Room Set Up

This workshop is to be divided into smaller working groups based on the different windows, with one mapper and 1-2 listeners in each group. Each group will have their own workspace.



For digital workshops, each circle represents a Zoom breakout room. Miro is used as the shared workspace.

For hybrid workshops: each working group can use Zoom breakout rooms, and gather in different rooms (for those that are meeting in-person). Miro is used as the shared workspace.

The Facilitator can be virtual and can enter each breakout room to support the working groups without disturbing others.

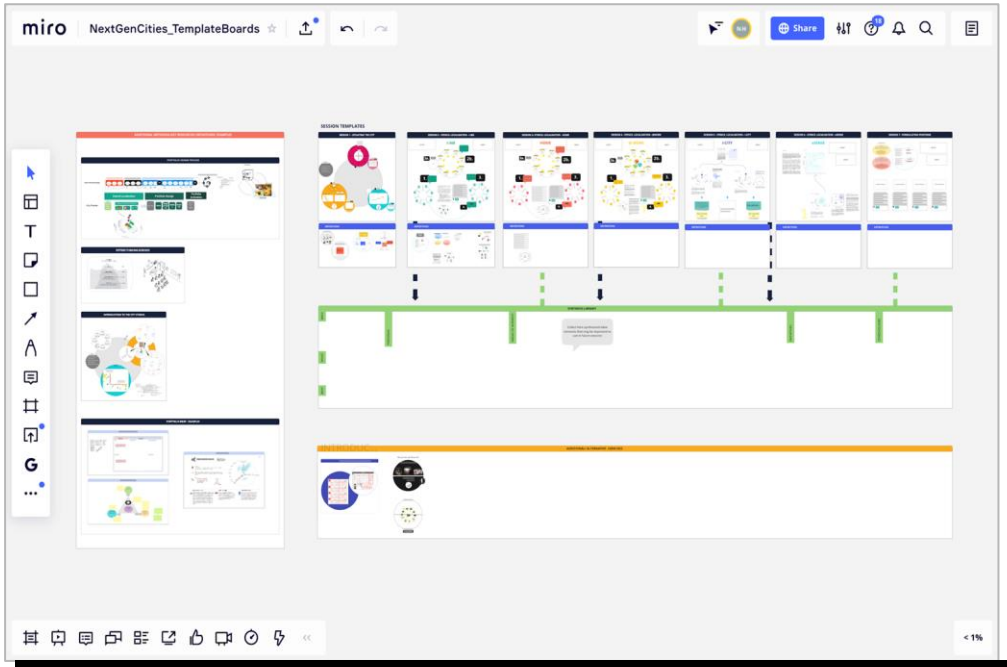
For in-person workshops, each circle represents a different table in the workshop space. A flip board is used as the shared workspace.

Useful Tools

1. A Joint Working Space: Choose an online collaborative platform such as Miro or Mural that you and the participants will use during the workshop. You will need to prepare the online board and upload required templates beforehand in the dedicated workspace. If you are new to these platforms, visit online tutorial by Miro or Mural.

2. Presentation deck: Download PowerPoint deck to support you through this process. It is up to you as the Facilitator to decide what slides to present, and to make amendments. We suggest that you print the relevant slides and notes for your workshop beforehand.

3. A digital conference platform: In the case of a fully digital or hybrid workshop, you and the sensemaking team will have to pick a digital conference platform where you and the participants can meet during the workshop.



Screen capture of Miro Board

02

TIME TO RUN YOUR WORKSHOP

Day 1: Making Sense of the Team Portfolio

SENSEMAKING

Structure of this Next Section

The workshop is designed to be conducted over the course of 3 days.

We break down each day for you by providing:

A **proposed agenda** for each day

A **checklist of items** you should have ready before the start of each day

An **explanation of agenda items** with facilitator prompts

An **explanation of each exercise**

Day 1: Agenda

Session	Objective	Who is involved?	Topic	Time Required
Session One	Prompt reflections on the organization's role in the industry/country's development and whether the organization is achieving sufficient impact.	• Head of Office • Senior Management • Sensemaking Focal Point • Project Presenters • Window Mappers • Listeners • Facilitator/s	**Setting the Scene** • Workshop Context (15 Minutes) • Workshop Overview (10 Minutes) • Workshop Set-up and Housekeeping Rules (5 Minutes)	30 Minutes
			Clarifying the Intent • Statement of Intent (20 Minutes) • Discussion (10 Minutes)	30 Minutes
		Break		
Session Two	Develop a greater shared understanding of the respective projects' "why", "how" and "what". The purpose is to identify insights, patterns, and prompt reflections on interconnections between portfolios and projects.	• Head of Office • Senior Management • Sensemaking Focal Point(s) • Project Presenters • Window Mappers • Listeners • Facilitator/s	**Project Presentation and Portfolio Mapping Exercise** • Introduction to the Project Presentation and Portfolio Mapping Exercise (15 Minutes) • Mapping Warm-up: Hobby Exercise (30 Minutes)* • Sensemaking (3 x 1 Hour)	4 Hours **We recommend doing the Mapping Warm-up exercise in advance of the workshop, particularly for digital sessions. This will also help reduce the session time.*
			Reflection/Wrap up • Key Take-Aways (15 Minutes)	15 Minutes

Total: *5.5 Hours*

Day 1: Checklist

Session 1: Setting the Scene and Clarifying Intent

Have ready the following inputs:

- ❑ Filled out Statement of Intent
- ❑ Updated 'Workshop Overview' slide deck

Expected outputs:

- ❑ Common understanding of the sensemaking workshop
- ❑ Updated Statement of Intent

Session 2: Project Sharing

Inputs:

- ❑ Filled out Project Presentation Templates
- ❑ Updated 'Making sense of our portfolio' slide deck
- ❑ The Window design ready for all Windows (drawn on all flipcharts and/or uploaded to online collaborative board before the session starts.)

Expected outputs:

- ❑ Filled-out consolidated Window templates (Mappers can work on the consolidation between session 2 and 3.)
- ❑ Initial insights of patterns

Day 1: Session 1 – Setting the Scene

Presentation 1: Workshop Context (15 minutes)

- Kick off the Sensemaking workshop by inviting senior management to make introductory remarks.
- The aim of the remarks is to set the scene for the sensemaking journey with focus on:
  - The industry/country context, including current and emerging challenges and opportunities.
  - Understanding why the team is doing the portfolio sensemaking exercise at this moment (workshop objectives).
  - How it might contribute to the team's work going forward.
- Invite other colleagues to comment on or add to the presented workshop context.

Facilitator prompts to support discussions with the Senior Management in advance:

What is the objective of the portfolio sensemaking workshop?

What are the key development challenges and opportunities (current and emerging) that you would like to make sense of?

What are the priority sectors/approaches/regions, etc. for the team to reach/design differently going forward?

What were the insights from the previous sensemaking workshop (if available and relevant) and what actions have they triggered?

Presentation 2: Workshop Overview (10 minutes)

- Use the slide deck to present the Sensemaking methodology and unpack what the three-day workshop will cover.
- Explain all terms using plain English.
- Present examples of outcomes from other teams to illustrate tangible results of a sensemaking workshop.
- Give the participants the opportunity to ask questions.

Presentation 3: Workshop Set-up and Housekeeping Rules (5 minutes)

- Explain how the workshop and the different sessions are organized (digital, in-person, hybrid).
- Using the slide deck, introduce workshop housekeeping rules, roles and responsibilities and agree with the participants on how to best engage colleagues connecting online.
- Highlight the importance of:
  - remaining curious
  - being supportive and respectful
  - giving your full attention

Day 1: Session 1 – Setting the Scene

Presentation 4: Statement of Intent (20 Minutes)

- Elaborate on the definitions of 'Statement of Intent' and 'transformative effects' and the role that this statement will play on the sensemaking journey.
- Invite senior management to present the team's intent. The statement should be broadcast on the screen using a slide deck or an online collaborative board so that everyone can read it.
- Showcase the team's previous Statement of Intent (if this exists and is relevant) and encourage participants to look for similarities and differences.
- Open for discussion to develop a shared understanding of the team's intent.
- Based on the discussion, jointly revise the Statement of Intent.

Presentation 5: Discussion (10 Minutes)

- Ask or post questions in the chat box that participants can use to unpack some of the thinking behind the Statement of Intent:
  - How does this statement resonate with you?
  - Given the industry/country context, is anything missing?
  - What skills/capabilities/partnerships etc. does the team have in place to realize the intent?
- Make sure that the participants clearly understand what 'transformative effect' means and how this relates to impact

Example Statement of Intent from the Viet Nam workshop

What role does UNDP want to play in Viet Nam's development?

The SDG's are unlikely to be met by 2030 unless we radically accelerate action and take alternative approaches to sustainably recover from Covid-19 and simultaneously respond to frontier development challenges. While we are working on multiple fronts to advance a **green and inclusive recovery that delivers the SDGs and equitable transition to IR4.0.** There are two broad areas that have emerged for priority action:

(1) **Enabling policy shifts and capacity for implementation**: UNDP is providing policy advice and capacitation to the government for the formulation and implementation of national and provincial strategies, policies and programmes. UNDP is promoting innovative institutional collaborations that allow decentralized space for innovation and experimentation.

(2) **Scaling Innovation:** UNDP is (i) advocating for the promotion of innovation and applying experimentation approach in national strategies, (ii) engaging partners in generating innovative ideas for experimentation and finding local solutions to address frontier policy challenges (iii) feedback loops for learning and scaling.

What development effects does UNDP want to contribute to in Viet Nam?

UNDP commits to support the Government of Viet Nam in ensuring that the Covid-19 recovery is green and inclusive and in addressing the multidimensional causes of poverty, inequalities and discrimination - reducing vulnerabilities of the most marginalized in society and **Leaving No One Behind**. This involves innovative actions in the following three key pillars:

I. **Unlocking new growth drivers** to accelerate, sustainable and inclusive growth driven by grassroots innovation and digital tools and platforms for social protection of the most vulnerable and achievement of SDGs.

II. Accelerating the transition to **a low-carbon circular economy, that is adapted and resilient to climate change** and disasters with sustainable management of natural capital, biodiversity and ecosystem services.

III. Strengthening capacity of institutions **to adopt Anticipatory, Adaptive and Agile governance** to address complex and persistent challenges in ways that strengthen the rule of law and access to justice for sustainable human development.

What to look out for:

Look out for statements of intent that:

- are too generic or output-oriented
- are industry/country context-blind
- does not resonate with the workshop participants

Reminder: Ensure that changes to the Statement of Intent are captured on the online collaborative board.

Templates can be found in Sensemaking supplementary materials available on UNDP website.

Day 1: Session 2 – Project Presentation & Window Mapping

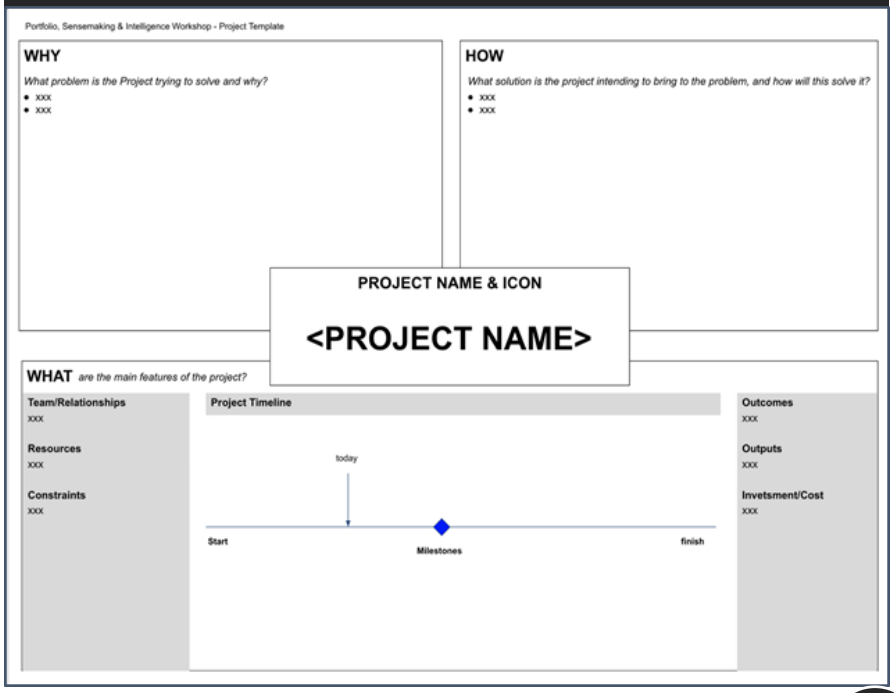
Presentation 1: Introduce the Project Presentation and Portfolio Mapping Exercise (15 minutes)

- Using the slide deck to present the Sensemaking process. Focus on:
  - The project presentation exercise
  - Selected windows
  - Patterns mapping
  - The different roles and responsibilities
- Introduce the projects that have been selected and in what order they will be presented.
- Explain how all project presentations are using the same template to structure their sharing (image to the right).
- Highlight the Listeners' role is important because they ask clarifying questions that help us all learn more about the project
- Explain that the exercise is to start surfacing patterns between projects and portfolios, and about the team at large
- Provide examples of patterns that have emerged from the exercise in other teams

Recommendations:

- Strict timekeeping is critical.
- Based on your Statement of Intent and chosen windows, you can modify your project presentation template slightly to include a provocation you want every project to address in their presentation.

Project Template



Facilitator Tips

Ask the participants to listen for, and ask questions about:

- How projects are being designed
- Approaches that are used by various portfolios/teams
- Current and potential connections between projects
- Project outputs that can be an input for another team
- Ways in which the team is addressing complexities

Templates can be found in Sensemaking supplementary materials available on UNDP website.

Day 1: Session 2 – Project Sharing & Window Mapping

Presentation 2: Run the Sensemaking Exercise

- Do a practice run with the hobby exercise (see next slide).
- Kick-start the Project Sharing Exercise:
- Each presenter has 5 minutes to present their projects. This will be followed by 5 minutes of Q&A. Each project gets a **max** 10 minutes.
  - Appoint a timekeeper who will inform presenters one minute before time runs out. Adjust the timing if needed but don't exceed 10 minutes in total.
  - Mappers will capture patterns related to their respective Windows on the online collaborative board (or flipchart paper).
  - Following each round of presentations, Mappers will present 1-2 emerging insights on their respective Windows. Invite others to share their reflections or insights of other patterns at the end.
- Wrap up (do not exceed 1 hour per round) and repeat until all rounds are completed. Recommend 3-4 projects per round.

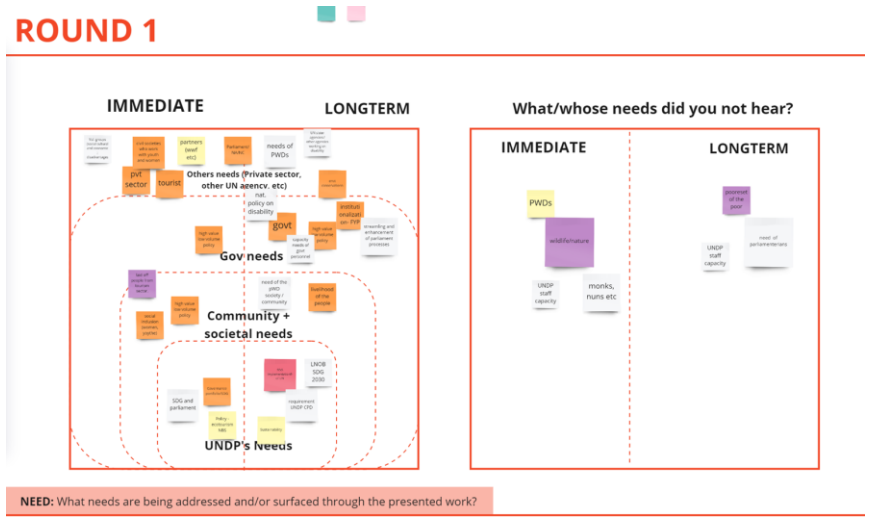
Recommendations:

- Present and explain the Windows that the Mappers are focusing on and how these link to the objectives of the Sensemaking workshop and the team's Statement of Intent.

What to look out for:

- Presenters who are held back by the template
- Mappers focusing on project information rather than patterns
- Mappers not listening for insights related to their Window

Example of a Window Mapping exercise in Miro



Facilitator Tips

Ask/post in the chat box examples of questions that participants can ask presenters:

- How did the project come about?
- What is the link between the project and other projects/ portfolios/the Statement of Intent?
- What approaches is the project using?
- Who is using/benefiting from the project outputs and outcomes?

Templates can be found in Sensemaking supplementary materials available on UNDP website.

Day 1: Session 2 – Hobby Exercise

This is a fun low-pressure practice exercise to introduce people to the act of 'mapping' for insights and patterns.

You need about 7-8 people for the practice run (your Mappers + 2-3 other volunteers who could be from the focal team or Project Presenters or Listeners)

3 volunteers will talk about:

- What's their hobby?
- Why do they do it?

And you need 2-3 Window Mapper volunteers. Use the Windows of:

- **Needs:** What/whose needs is this hobby addressing?
- **Resources and Capabilities:** Which Resources + Capabilities do the projects use?
  What Resources + Capabilities do they need to have greater impact?
- **Partnerships and Relationships:** Which relationships, partnerships & connections does the portfolio currently have and leverage? Which ones does it still need to create?

There are 3 rounds to this hobby exercise, and as a Facilitator you progressively reveal a new instruction at the beginning of each round:

Round 1: Instructions to the different participant roles

- Ask the first volunteer to freely share about their hobby for 3 minutes
- Ask Listeners to ask any clarifying questions for 3 minutes.
- Mappers should map what they are hearing from the presentation and Q&A against the visual frame of their Window.

Round 2:

- Add a new layer of information.
- Ask the second volunteer to share about their hobby for 3 minutes using the Project Presentation frame of 'WHY (they do this hobby), HOW (they do the hobby), WHAT (what do they need to do it)'.
- Ask Listeners to ask any clarifying questions for 3 minutes.
- Mappers should map what they are hearing from the presentation and Q&A against the visual frame of their Window.

Round 3:

- Add a new layer of information.
- Ask the final volunteer to share about their hobby for 3 minutes using the Project Presentation frame of 'WHY (they do this hobby), HOW (they do the hobby), WHAT (what do they need to do it)'.
- Tell Listeners they are now part of the office's HR team and are designing a wellness program. Their questions should be directed by this new identity and to feed into this wellness program design.
- Mappers should map what they are hearing from the presentation and Q&A against the visual frame of their Window.

After the 3 rounds, ask the room how having a presentation structure changed what was shared. Ask the Listeners how having a clear role changed the way they listened and what questions they asked.

Most importantly, ask the Mappers to share with everyone what they heard (or did not hear) across all three people's stories. For example, all three people said they did x to relieve stress, but no one spoke about what was causing them stress; all three people spoke about how their hobbies were done with other people though for some it was their family and for others it was with strangers.

Day 1: Session 2 – Window Mapping Explained

Window Mapping

The team will select 4-5 'Windows', which represent the strategic topics/themes a team is listening for through the 10-12 project presentations.

3 standardized Windows we recommend are:

1. **Needs:**
   What/whose needs is this project addressing?
   Are the needs we are addressing short-term and acute, or long-term and structural?
2. **Resources + Capabilities:**
   Which Resources + Capabilities do the projects use?
   What Resources + Capabilities do they need to in order to have greater impact?
3. **Relationships:**
   Which relationships, partnerships & connections does the portfolio currently have and leverage?
   Which ones does it still need to create?

Additional Windows are context specific to the team. The key guiding question through this process is:
What do you need to learn about your portfolio?

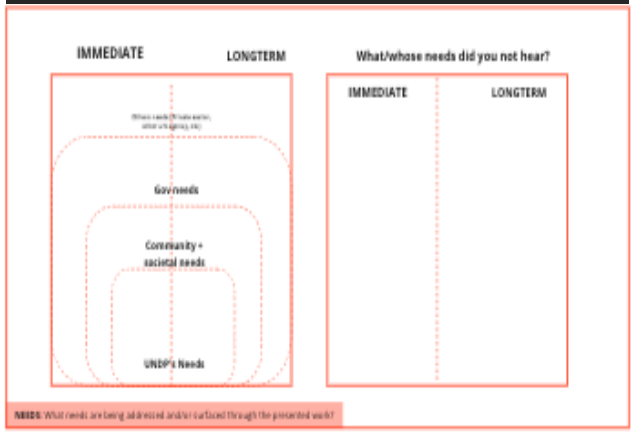
Examples of other Windows that could be used include:

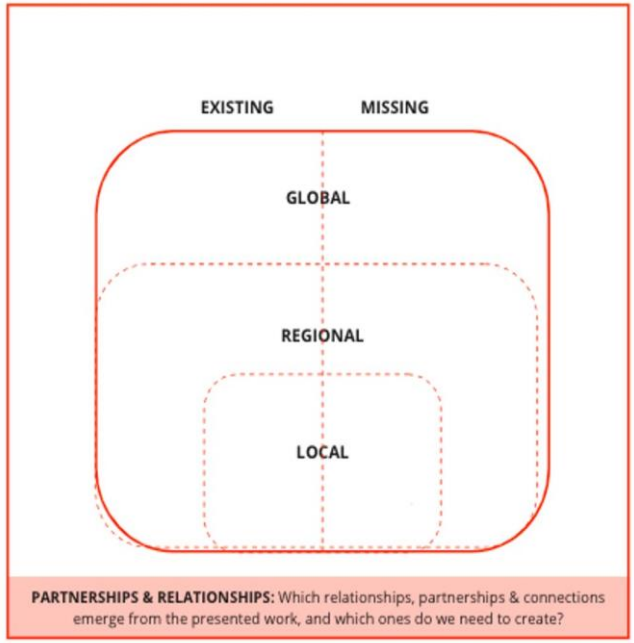
- **Levers of change:** What instruments are used to drive change?
- **Gender:** How is gender showing up in our projects?
- **Pandemic impact:** What are the challenges and opportunities unlocked by the pandemic?
- **Ways of working:** How do we work as a team?
- **Emerging opportunities:** What are projects hearing about emerging needs that could inform pipeline?
- **Scale of impact:** At what level are our projects operating?
- **Portfolio Focus:** Distribution of projects across different priority areas
- **Organization's role**: Proactive vs. Opportunistic

Mapping

- During the workshop, the Window Mappers will be required to listen for insights of patterns related to their respective Windows only.
- The maps represent all insights drawn from the workshop throughout the day and form the basis for deeper analysis on the following days.

Window Mapping Templates





03

TIME TO RUN YOUR WORKSHOP

Day 2: Insight Generation

SENSEMAKING

Day 2: Agenda

Session	Objective	Who is involved?	Topic	Time Required
Session Three	To identify potential interconnections between current projects, and to start to identify overarching patterns about the team and its portfolio.	• Head of Office* • Senior Management* • Sensemaking Focal Point • Window Mappers • The smaller subset of Day 2 attendees • Facilitator *We recommend senior management participation for the Claim Statements Exercise.	**Surfacing Emerging Insights**** • Introduce ABC Exercise (15 Minutes) • ABC Exercise (30 Minutes) • Sharing session (15 Minutes)	1 Hour

			Claim Statements
			• Intro to Claim Statements (10 Minutes)
			• Claim Statements Exercise
			  • Round 1 (45 Minutes)
			  • Sharing session (30 Minutes)
			  • Voting
			  • Round 2 (45 Minutes)
			  • Sharing session (30 Minutes)
				2 Hours

			Reflection/Wrap up • Key Take-Aways (15 Minutes)	15 Minutes

Total: *3 hours 15 minutes*

*** We recommend that you run this exercise Day 1 if you run an 'in-person' workshop.*

Day 2: Checklist

Session 3: Insight Generation

Have ready the following inputs:

- ❑ Adjusted 'Insight Generation' Slide deck
- ❑ Project templates uploaded to the online collaborative board (for the ABC Activity if it is being done digitally)
- ❑ Ensure the online collaborative board is updated for Day 2 activities
- ❑ Pre-plan your breakout room participant lists

Expected output:

- ❑ List of potential interconnections and overlaps between current projects (ABC Activity)
- ❑ Filled-out and clustered claim statements that are ready for Day 3

Day 2: Session 3 – Surfacing Emerging Insights

Presentation 1: Introduce the ABC Exercise (15 minutes)

- Following reflections from Day 1, use the slide deck to present the insight generation process, i.e. mapping of initial interconnections.
- Introduce the **ABC Exercise**. Explain that the ABC exercise is to start identifying opportunities for collaboration between projects that can be replicated or scaled for greater impact, for improved use of resources or for identifying new pipeline ideas.
- Provide examples of connections and opportunities that emerged in other teams. If you noticed any connections during the sensemaking session itself, you could share them with the team.

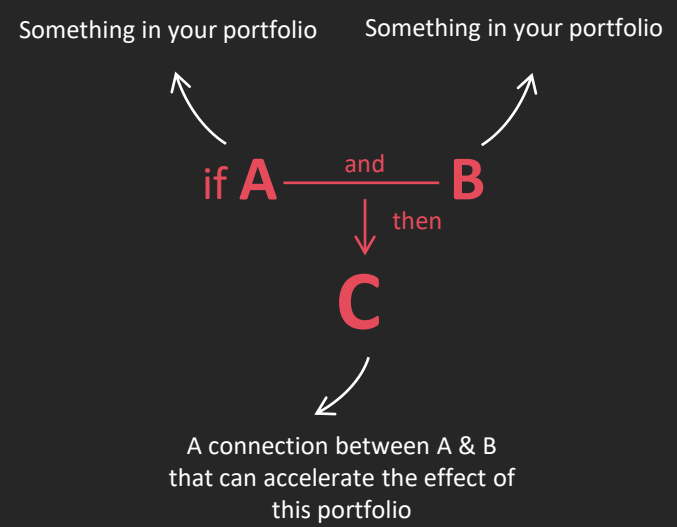
Presentation 2: Run the ABC Exercise (30 minutes)

- Run the exercise in smaller groups (one Mapper per group). You can use breakout rooms if in a digital or hybrid workshop. Links should be captured on the online collaborative board. A non-digital version of this exercise is to use sticky notes on the walls, and to have people use three columns to capture their ideas: A + B = C.
- Each group will focus on one of the sensemaking Windows and map connections using post it notes on the online collaborative board.
- Explain that we are looking for interconnections that allow our work to have greater impact.

Presentation 3: Share Back (15 minutes)

- Ask each group to share their insights.

ABC Exercise Structure



Facilitator Tips

- Rotate between the different rooms to guide the conversation.
- Ask or post the following questions in the chat box to prompt discussions;
  - Based on what we heard during the sensemaking session, what projects already work together? Why?
  - What can we learn from their collaborations/ways of working?
  - How can these learnings be applied to other projects/areas of work?

ABC Exercise in Practice – Examples

ABC Exercise

Something from your portfolio

Plastic Waste Work

Something from your portfolio

Sustainable Tourism Work

if **A** — and — **B**

then

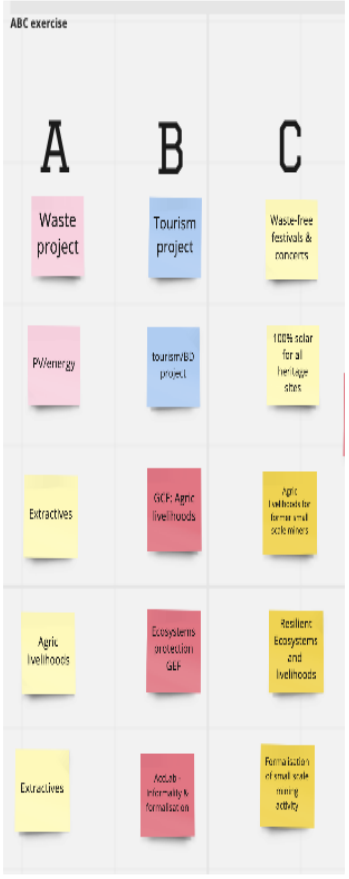
C

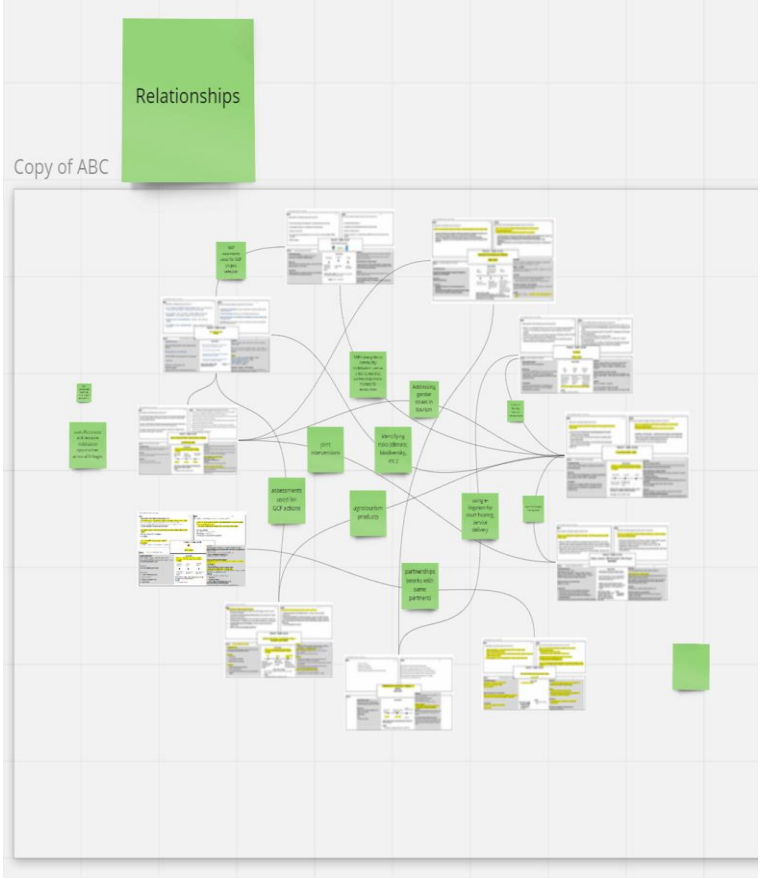
(new) Plastic Free Tourism Work

A connection between A & B
that can accelerate the effects
of this portfolio

Currently, A & B do not speak to each other

Examples of how you can run the exercise





Day 2: Session 3 – Developing Claim Statements

Presentation 4: Introduce Claim Statements

Using the slide deck, elaborate on the concepts of 'Strategic Arguments' and 'Portfolio Claims'.

REMEMBER: Explain all terms using plain English.

- Introduce the Claim Statement Exercise and run over the Claim Statement template/structure.
- Explain that the exercise is to start articulating claims (or patterns) about the portfolio that will then help the team surface 'changes' that are needed based on these patterns.
- Keeping your Statement of Intent as your goal post, claims can either be positive (identifying something you already do well and need to do more of) or constructive in nature (identifying something you need to do less of or do differently).
- Provide clear examples of claim statements from other teams/offices and/or the team's previous sensemaking workshop. Give examples of claims about the team's portfolio you already have heard during previous sessions (if any).
- Explain that each breakout group (of 2-3 people) will be given one sensemaking Window, and their objective is to develop one or two strong claim statements about the team's portfolio/way of working based on what was mapped for that Window on Day 1.

RECOMMENDATION: Run through the Claims structure shown on the next slide.

Round 1: Claims (45 min)

TWO STEPS

1. Take 5-10 minutes to make as many claims as you can about the projects based on what WAS HEARD yesterday through the windows + notes
2. Take the 1-2 claims that you feel are most critical (i.e. relate to the whole team beyond the scope of just presented projects on day one and develop them further using the provided format.

Facilitator Tips

- Explain or post the following to prompt discussions about what the claims could cover:
- Things that the team does on an *ad hoc* basis but would like to institutionalize
  - Something the team wants to do differently
  - New themes that have emerged as key areas of priority to achieve the intent but where the team does not work together, or where skills are lacking

Making Claims Explanation

Structure for Formulating Claims

The workshop participants should use the **following structure** when formulating their claims.

Claims can be about the team's work culture, operational elements, technical project aspects, capabilities (*basically anything that directly or indirectly impacts the Portfolio and the ability for the team to have its intended impact In the industry/country with its work). They can be positive or constructive statements*.

Headline

- What is the claim about?
- How is it showing up in current projects?

Insights

- What **realization** did you have, based on what you have heard and observed from the discussion till date?

Consequence

- What does this finding mean for the team?
  What are the implications?
  What new options does this insight present?

Evidence

- Where are we seeing this in the projects we heard on Day 1? Share concrete examples.

Headline

The gender lens is not consistently considered in our programming narrative

Insights

Although women are instruments of change for project implementation; it is not clear how our initiatives advance their interest and specific needs of women - is it an implicit assumption?

Rigorous needs assessment at the individual level, is not yet well integrated into the CO programming, which could further highlight our understanding of systemic issues on gender

Consequence

CO is missing out on a thorough understanding of 50% of the population, and is blind to policies and actions that impact on women, LGBTQIA+ & systemic issues

Evidence

GBV was not considered during the pandemic response programming

The CO has data points that could be used to better understand systemic issues around gender but is not systematically analyzed to inform programming and policy formulation

Geographic disconnect between where we currently have data tools and projects are designed for

Some projects already recognize the role of women as change agents, but the outcomes of their contributions are not highlighted

Example of using the Claims Structure template

Day 2: Session 3 - Claims Statement: Round 1

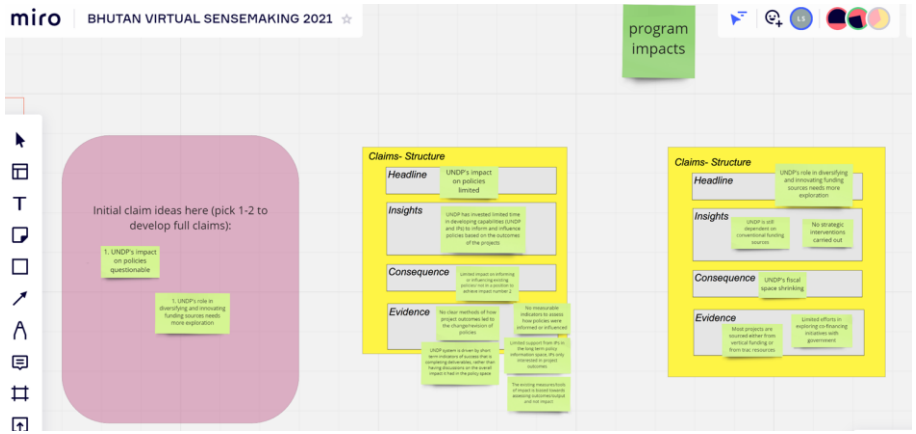
Presentation 5: Run Round 1 of the Claim Statement Exercise

- Run Round 1 of the exercise in smaller groups using breakout rooms with at least one Mapper per group. Try to mix up the groups to ensure diversity in experience, number of years in the organization, thematic focus, sex, age, etc.
- Encourage participants to first review their specific Window's notes, then brain dump as many claims as they can in the dedicated box and then pick 1-2 claims that they want to develop fully.
- Remind the participants to also think about insights emerging from the ABC exercise.

What to look out for:

- Teams that are afraid of making changes to statements made by other participants.
- Claims that are not specific to the team or where the team does not have the organization to act on the claim.
- Claims that do not resonate with the group as a whole.
- Claims that are not derived from the insights from the sensemaking and ABC exercises.

Example from the Bhutan Sensemaking Session



Facilitator Tips

- Rotate between the different 'rooms' to guide the conversation.
- Ask or post the following questions in the chat box to prompt discussions;
  - How can an 'accidental' or 'proven' practice/new approach become the new default?
  - Do claims from a previous sensemaking session still stand?
  - Why were these claims made? What is missing?
  - Are there any links between the different claims? What are they?
  - What are the connections between the claims and the team's ability to realize the intent?

Day 2: Session 3 - Claims Statement: Round 2

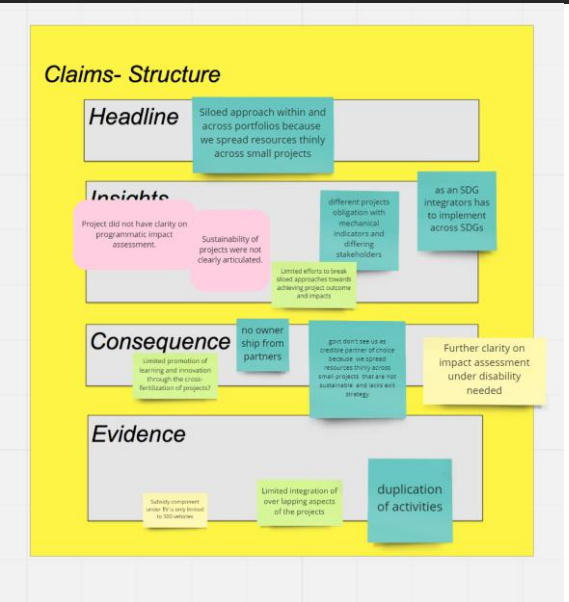
Presentation 6: Sharing Session

- After 45 minutes, ask the group to share their initial claims. Encourage the presenters to explain the thinking behind the statements and what this might mean for the team.
- Ask everyone to also step back and identify any potential claims that did not come up in Round 1 by any of the groups but feel important to be included. These additional claims are to be developed in Round 2.
- In the case of overlapping/interlinked claims, ask the team to cluster these claims so they can be merged and cleaned up as a single claim in Round 2.

Presentation 7: Round 2 of the Claim Statement Exercise

- Introduce and run Round 2 of the exercise in the same smaller groups/breakout rooms. The goal is to develop any missed claims and to merge any overlapping claims.
- After 30 minutes, bring the team back to present their new claims.
- Once the claims are agreed on ask each participant to vote for their top four claims to take forward to the next exercise of Propositions (Essentially you are asking "Given the limited resources–which four do you really want to do something about?")

Example from the Bhutan Sensemaking Session



Facilitator Tips

- Rotate between the different 'rooms' to guide the conversation
- If the participants are struggling to decide, refer to the fact that the sensemaking is not a one-off activity that only takes place during the workshop but that the participants can go back to the collaborative board at a later stage to develop additional statements.
- Post the link to the collaborative board in the chat so that everyone can follow.
- Remind the participants to also think about insights emerging from the ABC exercise.

Reflection & Wrap Up

Presentation 8: Reflection and Wrap up

- Ask people to step back and reflect on what came up in Day 2. Is there anything that stands out or surprised them?
- Wrap up after 15 minutes.

What to look out for:

- Claims that do not resonate with the participants, including senior management.
- Claims that are still not fully developed.

Facilitator Tips

- Prompt participants to raise questions or concerns about claims and/or reflect on any insights that are missing.
- Encourage participants to reflect on whether the team may be able to realize the intent.
- If needed, ask the participants to finalize the claims after the session and upload the claims on the collaborative board before the start of Day 3.

An in-person Sensemaking Workshop

04

TIME TO RUN YOUR WORKSHOP

Day 3: Intelligence Generation

SENSEMAKING

Day 3: Agenda

Session	Objective	Who is involved?	Topic	Time Required
Session Four	Help the team understand what it needs to do differently, why, and what decisions and pathways of change are required. The purpose is to prompt the development of a set of propositions/recommendations and an associated action plan (pathway of change) based on the generated intelligence.	• Head of Office* • Senior Management* • Sensemaking Focal Point • Window Mappers • The smaller subset of Day 3 attendees • Facilitator *We recommend senior management to participate throughout but particularly during the second part of session 4 starting from Proposition Exercise: Share Back. This will ensure buy-in for the propositions and actions suggested.	**Revisiting Claims** • Presentation of Claims (15-45 Minutes)	Up to 45 Minutes
			Propositions and Actions • Introduction to Propositions (10 Minutes) • Proposition and Action Exercise: (2 Hours) o Round 1 (45 Minutes) o Share Back (30 Minutes) o Round 2 (45 Minutes)	2 – 2.5 Hours
		Break		
Session Five	Help the team understand what it needs to do differently, why, and what decisions and pathways of change are required. The purpose is to prompt the development of a set of propositions/recommendations and an associated action plan (pathway of change) based on the generated intelligence.	• Head of Office • Senior Management • Sensemaking Focal Point • Window Mappers • The smaller subset of Day 3 attendees • Facilitator	**Final Reflections/Next Steps** • Key take-aways (15 Minutes) • Revision of Statement of Intent (10 Minutes) • Next steps (5 Minutes)	30 Minutes

Day 3: Checklist

Session 3: Insight Generation

Have ready the following inputs:

- ❑ Adjusted 'Insight Generation' Slide deck
- ❑ Project templates uploaded to the online collaborative board including claim statements
- ❑ Ensure the online collaborative board is updated for Day 3 activities
- ❑ Pre-plan your breakout room participant lists

Expected output:

- ❑ Final propositions

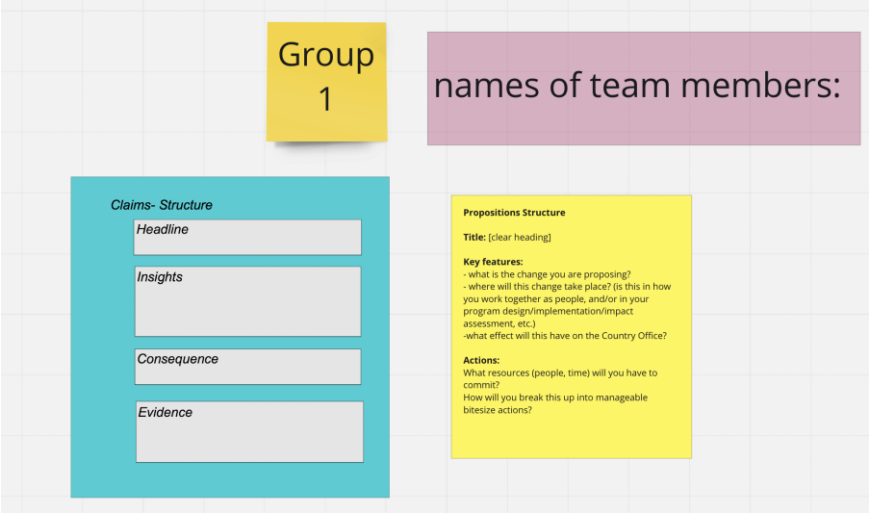
Day 3: Session 4 – Updated Claims

Presentation 1: Revisiting Claims Statements

- Review the final four Claim Statements voted by the group at the end of Day 2. Discuss any outstanding questions anyone might have before moving on to the Propositions exercise.

REMINDER: If relevant, refer to the fact that the sensemaking is not a one-off activity that only takes place during the workshop but that the participants can go back to the collaborative board at a later stage to develop additional Claim statements.

- Once the group agrees, copy and paste the filled-out Claim templates next to the Propositions templates on the board, then lock the board.



Facilitator Tips

- Post the link to the collaborative board in the chat so that everyone can follow.
- Prompt participants to reflect on the level of learning and innovation the team will need to leverage or overcome the claims

Day 3: Session 4 – Propositions & Actions

Presentation 2: Introduce the concept of "Propositions"

- Use the slide deck to introduce the concept of 'Propositions' (actions will be covered later). Refer to the concept of 'Strategic Arguments' presented during session 3.

REMEMBER: Explain all terms using plain English.

- Once the team has developed claims about the portfolio, it is time to think about ways to either scale these insights (if positive claims) or address shortcomings (if negative claims). This is done through the development of 'propositions'–or statements on how change will be affected.

The following questions will guide the development of the proposition.

Knowing what you now know, what will you do differently?

Facilitator Tips

- Provide examples of propositions from other sensemaking workshops. If you have suggestions that can be applied to the team's own Claims Statements, you could share them with the team.
- Break down one statement across the HERE, THIS and THIS WAY to help the participants understand the logic behind the structure and how they can use it when developing their own propositions.

Propositions seek to clarify what you want to change and

A specific feature or opportunity within your portfolio

Go **here**…to do **this**…in **this way**

The change that needs to happen to accelerate the effects of your portfolio

The features of your recommendation

Propositions in Practice–Examples from our Board

Proposition Structure Template

Title: [clear heading]

Key features:
- What is the change you are proposing?
- Where will this change take place?
  (Is this how you work together as people, and/or in you project design/implementation/impact assessment etc.?)
- What effect will this have on the team?

Actions:
- What resources (people, time, money) will you have to commit?
- How will you break this up into manageable bite-sized actions?

Proposition Example

Title: Need for integrated project design with life cycle and collaborative approaches.

Key features:
- **What is the change you are proposing?**
  Each project has an integrated design which is currently not existing.

Project design has:
- Clear policy/agenda
- Cross-pollination of areas of work
- Open for entry points for synergies for other projects
- Includes gender, inclusion lens
- Co-design projects with stakeholders (including CSO, CBO) and in-house cross-cutting teams in office using participatory process.
- Monitoring & Evaluation and Learning integrated at Design stage and allocated resources** **(to build out in further detail)**
- Tap learnings beyond project cycle.
- Impact needs to be clearly captured.

- **Where will this change take place? (Is this how you work together as people in your project design/implementation/impact assessment?)**
  In the project streams and cross-cutting teams; ways of working with stakeholders; ways of building partnerships;

- **What effect will this have on the team?**
  More impactful projects; coherence in action and efforts.

Actions:
- **What resources (people, time) will you have to commit?**
  No additional financial resources required. Project teams + cross-cutting teams + stakeholders' time is required.

- **How will you break this up into manageable bite-sized actions?**
  To be designed after the workshop in partnership with relevant teams.

Day 3: Session 4 – Propositions & Actions (Round 1)

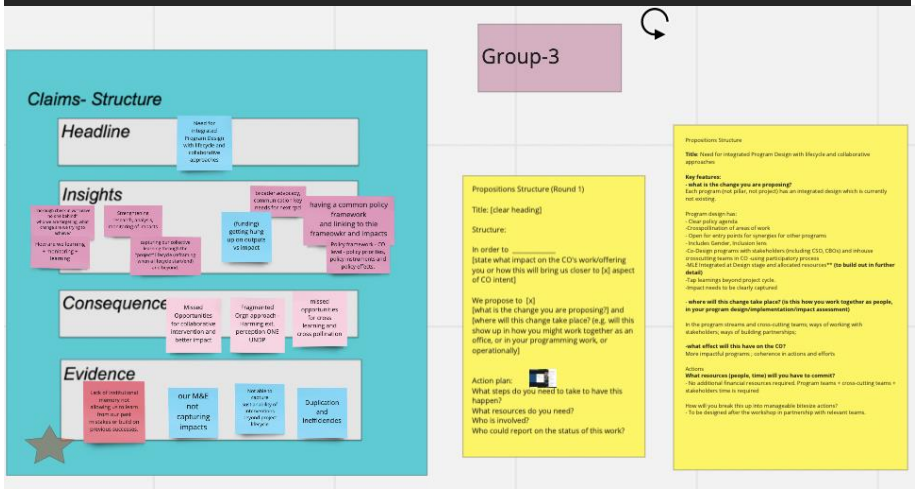
Presentation 3: Run Round 1 of the Propositions Exercise

- Run Round 1 of the exercise in smaller groups/breakout room (one per claim) with at least one Mapper per group. Try to mix up the groups to the extent possible to ensure diversity in terms of experience, number of years in the organization, thematic focus, sex, age, etc.
- Encourage participants to first review their specific claim, then brainstorm about changes they want to make, and then finally start drafting a proposition in line with the proposed structure. Post-it notes can be used as place holders whilst the group collects ideas.
- Remind the participants to also think about insights emerging from the ABC exercise.

What to look out for:

- Propositions that are not specific to the team or where the team does not have the agency/capability to act.
- Propositions that are disconnected from the claims made.

Example from the xx Sensemaking Session



Facilitator Tips

- Rotate between the different 'rooms' to guide the conversation.
- Ask or post the following questions in the chat box to prompt discussions;
  - Given the claim that we've made, what needs to change?
  - What is the change you are proposing?
  - Where will this change take place? (e.g. will this show up in how you might work together as a team, or in your technical work, or operational)
  - What impact will this have on the team's work/offering? How does this bring you closer to your intent?

Day 3: Session 4 – Propositions & Actions (Round 2)

Presentation 4: Sharing Session

- After 45 minutes, ask the group to share their propositions using the collaborative board.
- Encourage participants to reflect and discuss the relevance of the propositions made. Discuss what is well reflected and what is missing.
- Present Round 2 of the exercise. Explain that Round 2 is to further articulate the propositions and start thinking about activities that will help the team move from proposition to action.
- Explain that the activities are team specific with an immediate to medium-term timeline.

Presentation 5: Run Round 2 of the Claim Statement Exercise

- Run Round 2 of the exercise in the same groups using breakout rooms.
- After 30 minutes, bring the team back to present their updated propositions and actions.

Facilitator Tips

- Rotate between the different groups/breakout rooms to guide the conversation
- Ask or post the following question in the chat box to prompt discussions;
  - Do these propositions resonate with the team?
  - Are the propositions and suggested actions something that you would prioritize given available time and resources?
  - What is missing?
  - Now that we know what we know, does this change how we view our role and what we want to achieve?
  - How will this change the way we work?

Day 3: Session 5 – Final Reflections & Next Steps

Now that we know what we know,

How does this change how we view our role, and what we want to achieve? (our identity & intent)?

An in-person Sensemaking Workshop in xxxx

05

NEXT STEPS

SENSEMAKING

Next Steps

You have finished the workshop, and your Facilitator role is nearing its end. Well done!

This is the time when the real work starts for the team. In fact, sensemaking is not a one-off process, rather a methodology that can be used over and over to continuously extract insights and induce learning from projects and portfolios which should be followed up by key actions.

How to document sensemaking workshop inputs and outputs?

Using the sensemaking report template, work with the Sensemaking Focal Point to document the workshop journey, ranging from workshop inputs (such as the Statement of Intent) to the insights generated from the claims, propositions and action plan.

Ideally, the report should be completed within two weeks after the workshop and shared with relevant colleagues in the team (participants and others) for feedback.

How to ensure that the workshop results in improved learning?

Work with the sensemaking team to turn the collaborative board into a knowledge management tool. The board can serve as a point of reference and the team can also continue to build on generated insights and intelligence during upcoming sensemaking sessions.

Evaluation

Don't forget to follow up with the sensemaking team and participants after the workshop. Although it can be scary to hear what people really thought about the workshop, it will help improve your sensemaking offering.

Develop a Follow-up Plan

Work with senior management and the leadership team to design/determine an appropriate and feasible plan to follow up on what the workshop generated. This could look like having all those responsible for an action item sharing their progress every month; a check-in meeting with the sensemaking team every quarter.

ASIA AND THE PACIFIC

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