



ASIA AND THE PACIFIC

Regional
Innovation Centre



PREPARING TO RUN A SENSEMAKING WORKSHOP

what is it, why do it, how to prepare for it?

About this Guide

What is it?

This Preparation Guide is created by UNDP Asia-Pacific Regional Innovation Centre to help teams decide if they should run a Sensemaking workshop, and how to prepare for it.

Who can use it?

The team considering to run this multi-day workshop (which includes the senior management leading the process). It contains handy checklists, definitions, event formats and templates that you can use to run your own Sensemaking sessions!

Complimentary resources

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

- *[UNDP Sensemaking Workshop Facilitator Guide](#)*, which breaks down how to run a session in more detail (designed to be used by the Facilitator + session focal team should you choose to go forward with running the workshop).

Acknowledgements

UNDP Portfolio Sensemaking and Acceleration Protocol was developed by Chôra Foundation (previously known as Axilo) for UNDP Asia-Pacific Regional Innovation Centre in 2019.



Contact Us

If you have any question about this guide or process, please email: brh.ric@undp.org

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01

SENSEMAKING EXPLAINED



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 of 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.

Why Sensemaking? (Some of the main reasons)



Increase impact by accelerating the effects of your current portfolio and optimizing what you have already invested on the ground. This entails identifying opportunities to efficiently and effectively utilize assets across current projects e.g. sharing of successful methodologies/ processes, donor resources, human resources, capabilities, partnerships, social networks.



Transition to working using portfolio approaches by identifying ways to design projects to be more cross-cutting and intersectional.



Reflect on how your team's portfolio fits with the organization's broader intent. This will help inform thinking about what you might want to keep, drop, add for your next strategic planning or project development cycle or as part of a mid-term review.



Identify (technically, operationally, interpersonally) what your team is doing well, where your organization holds comparative advantage, where you need to improve, new capabilities you might need to invest in, and potential future opportunities.



Host a collective strategic conversation in the team that goes beyond senior management and team leaders, by bringing a broader group of colleagues together. This also encourages collective ownership of work.



Shift from a compliance and reporting-heavy organization to a user-centric, learning organization.



Invest in the capability development of staff specifically in the areas of facilitation, active listening, abstraction, identifying patterns, articulating and presenting strategic arguments.



Support the onboarding of new senior management, giving them a thorough introduction to the team culture and portfolio of activities.

Combining Sensemaking with Futures thinking

Your Sensemaking workshop can also be complemented with additional 'Futures Informed' session(s). We would recommend this if, for instance, you wish to:

- 'Stress test' how your current portfolio handles a futures analysis of emerging external trends or risks – in its current design considerations and/or its flexibility to be able to adapt and respond to such shifts
- Seek support in identifying potential opportunity spaces (technical/programmatic, partnership, business or funding models, etc.)
- Explore ways to generally design in more proactiveness vs. reactiveness into your team/office's ways of working (technically, operationally)

A combined Sensemaking and Futures thinking workshop process can be of particular support to the project development process. For this we recommend starting early in the process:

- Undertaking Futures Analysis to inform the industry/country assessment, development of the Theory of Change, as well as identification of risk
- Undertaking Sensemaking for prioritization and decision making for the next project development, and reflection of lessons learned from the past project development cycle

What is involved in a Sensemaking Workshop?



Pre-workshop

Articulate your Identity

What role does your team see itself playing in the industry/country?

State your Intent

What transformative effects are you seeking to create there?

Set Learning Objectives

Why are you doing this workshop at this time?

What do you want to learn about your current portfolio? Use the above to select a subset of 10-12 projects from the team portfolio to learn from.

Handy Templates:

[Statement of Intent template](#)

[Project presentation template](#)



During Workshop

Listen to Project Presentations

The 10-12 projects are individually presented following a common template unpacking (a) What is the issue, and why is your organization doing something about it (b) How is our project addressing the issue and (c) What makes up the project. We also reflect on this project as part of wider team portfolio. One presenter per project.

Map Thematic Windows

The Windows represent different strategic topics for which the team is listening to map patterns and insights from the presentations (e.g., Whose needs and what needs are the projects addressing, What type of impact are the projects having and where in the system is the impact taking place). There are usually 4-5 Windows. There is one Mapper per Window.

Make Sense - Abstraction & Synthesis

Extrapolating the patterns and insights noted to the wider team portfolio. Identifying new interconnections between current projects and determining what can be done to bring us closer to our intent.

Invite Participants

Participants are from the team who have an interest in, or a role to play in the team's portfolio. Senior management's role is to offer guidance and strategic oversight.



Post-Workshop

Finalize the Intelligence Report

A small team processes workshop outputs, identifies key insights, and develops the final report with proposed action plans of next steps.

Build Momentum and Support within the Office

Ensure the work is shared and discussed with broader set of colleagues to get their buy-in and build the momentum needed to accomplish the action plan.

Testimonials

Sensemaking enables offices to curve our programme offer and project cycle management around strategic pivot that we need to better understand in fast changing and complex operating environment.

Practicing lateral thinking opens a gate of meaning in our work and if regularly practiced has the potential to mature it into a constant and distinct trait of character that can make us simply better development professional. This could be most strategically seen in the rise of integrated work across the office's overall portfolio.

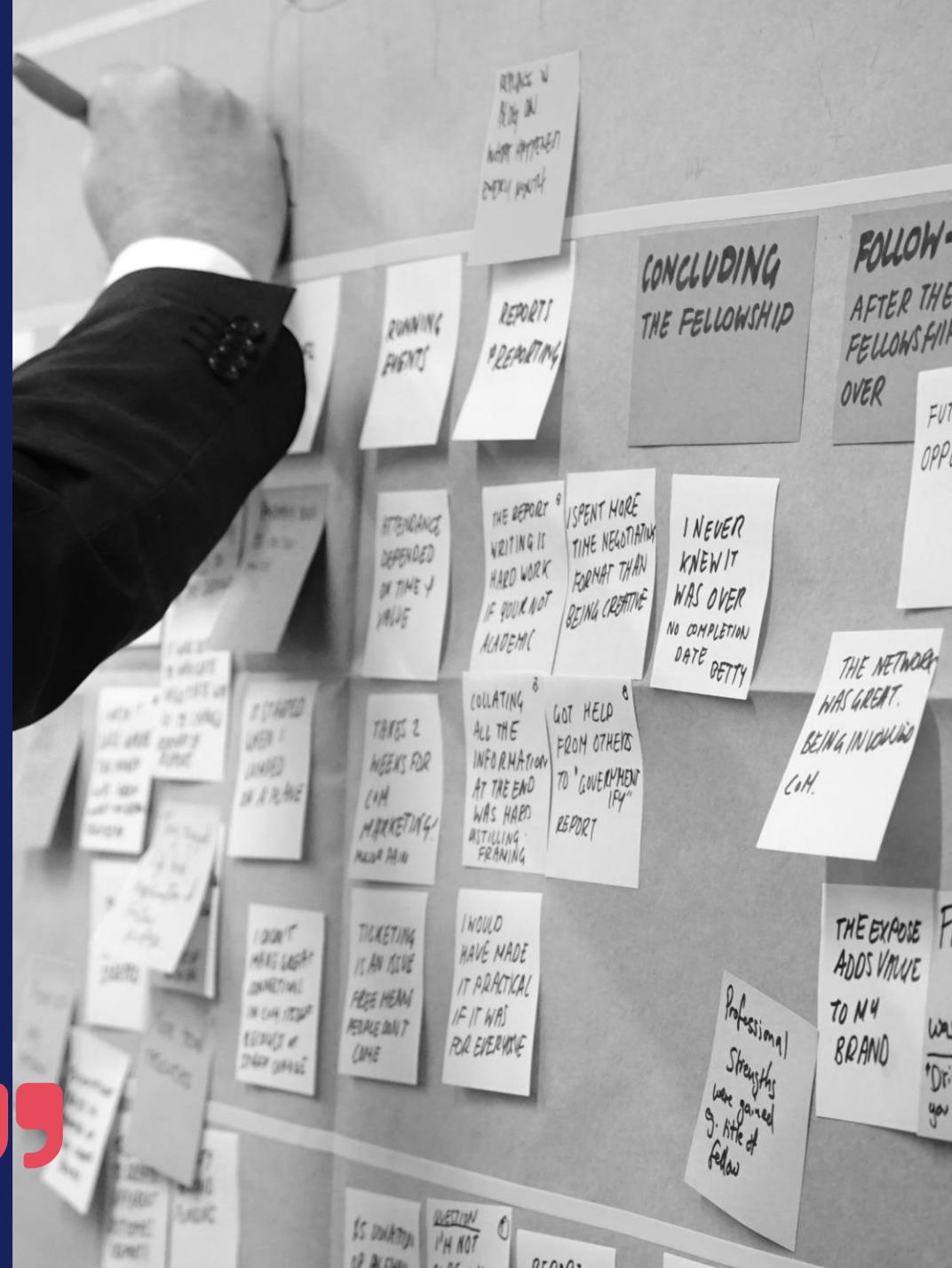
- Enrico Gaveglia, RR UNDP Maldives

Sensemaking is a key, it opens up to broader horizons for UNDP development in country and globally. It goes above projects and helps us see the sense/essence of our work. As I could see from my own experience, sensemaking brings positive change, generating a new dynamic within the office team and creating greater cohesion for a common purpose.

- Christophe Bahuet, Deputy Regional Director for Asia and the Pacific

The sensemaking process provided an important platform to collectively reflect on UNDP's portfolio through the lens of key development challenges, emerging trends and risks. Through this approach we were able to build a common vision to identify and prioritize opportunities and approaches to strengthen UNDP's work and value-added in India.

- Nadia Rasheed, DRR UNDP India



02

WORKSHOP PREPARATION & TIMELINE



Deciding your workshop format: In-person, digital or hybrid

Ultimately, the format of the session is your choice. Formats can be driven by available space, healthcare guidelines, internet connectivity, comfort with technology tools, and location of participants.

Benefits

Potential Downsides

In-person workshop



- Social experience that allows for relationship building
- Stronger engagement (e.g. fewer digital distractions)
- Access to non-verbal cues like expressions and body language

- Manual post-workshop documentation (unless you still decide to use an online collaborative board to capture different elements)
- Deeper knowledge sharing siloed to only those who can participate in person

Digital workshop



- Using an online collaborative board (e.g. [Miro](#), [Mural](#)) to directly capture all workshop notes, cutting out manual documentation

- Much harder to stay energized, listen intently and keep focused virtually vs in person

Hybrid Workshop*



- For those meeting in person, there is the social and relationship benefit of in-person
- Due to even one online-participant needing to be included, there is the use of online board e.g. Miro, Mural which cuts down on manual documentation

- Much greater planning and coordination on the facilitator's part regarding the design and flow of the session (e.g. how to run the various activities, breakouts with a mixed in-person/virtual group)

*Examples of hybrid event formats: Some participants in room(s), facilitator is virtual; participants are split between virtual and physical

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 or Innovation teams.

Mapper Role x 4-5 windows



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.

Project Presenter Role x 10-12 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.

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 based on these insights 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.

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.

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	<p>Design Workshop:</p> <ul style="list-style-type: none"> Industry/Country context Finalize the various inputs for the workshop (team identity and intent, windows and projects) Identify participants, and their role (project presenter, window mapper, listener), logistics 	<ul style="list-style-type: none"> 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) 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 	<p>Workshop follow up:</p> <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Workshop Facilitator Senior Management Sensemaking Focal Point 	<ul style="list-style-type: none"> Workshop Facilitator Head of Office Focal Point Portfolio Mappers 	<ul style="list-style-type: none"> Workshop Facilitator(s) Larger group of 20-25 participants including senior management 	<ul style="list-style-type: none"> Workshop Facilitator(s) Smaller group of 8-10 attendees from Day 1 that stay on for Day 2 and 3 	<ul style="list-style-type: none"> Portfolio Team

Sensemaking Workshop Design & Timeline

KEY MILESTONES

approx. 6 weeks
in advance



Planning Call
Senior Management
Focal Point(s)

4-6 weeks
in advance



Planning Call
Focal Point(s)
Facilitator

approx. 3 weeks
in advance



Planning Call
Senior Management
Focal Point(s)

1 week in
advance



Planning Call
Mappers
Focal Team
Facilitator



**Sensemaking
Workshop -
Portfolio
Sensemaking**
(1 day)



**Sensemaking
Workshop -
Intelligence
Generation**
(2 days)



**Senior Management
to circulate
Intelligence Report
within the wider office**

PRE-WORKSHOP (4-6 WEEKS IN ADVANCE)

WORKSHOP

POST-WORKSHOP

- ▶ Review this Preparation Guide and decide if this is the right process based on your objectives for the workshop.

If yes:

- ▶ Also decide if you want to include additional foresight session(s)
- ▶ Choose the workshop format
- ▶ Start to discuss who will be the workshop facilitator
- ▶ Set up weekly check-in calls for focal team + facilitator + Senior Management

- ▶ Begin work on workshop design, Statement of Intent template, foresight preparation (if applicable)

- ▶ Choose the Window & 10-12 projects
- ▶ Decide If you want to do any internal and/or external consultations to inform Statement of Intent and start preparations

- ▶ Decide your participant list
- ▶ Finalize workshop design and structure
- ▶ Share project presentation templates with presenters to complete

- ▶ Run practice session with mappers
- ▶ Share instructions with presenters
- ▶ Finalize Statement of Intent, Workshop Agenda and Workshop Set-up
- ▶ Receive all completed project presentation templates

Portfolio Team to prepare:
Draft Intelligence Report &
Action Plan

KEY ACTIVITIES

Pre-workshop Checklist: 4-6 Weeks out

To design an effective Sensemaking workshop we need to know:

WHO will be doing the Sensemaking (industry/country context and information),

WHAT they are making sense of (portfolio/projects), and

WHY they are making sense (organization's intent, what development effects and impact the organization is seeking to accelerate).

Throughout the preparation phase we will be requesting the following from you.

The Checklist



REVIEWING INDUSTRY/COUNTRY INFORMATION

After the initial planning call, we recommend the team to start the following work and share/review the following documents with the workshop facilitator:

- Articulate your workshop objectives. *See next slides for guidance.*
- Start discussions on the Statement of Intent. *See the Templates section for guidance.*
- If you want to inform your Statement of Intent through some short consultations with internal and external colleagues, be sure to plan for this (choosing participants, scheduling your consultations, etc.).
- Share size and distribution of office portfolio (the current thematic areas, number of projects, funding).
- Based on objectives and intent, start to curate the list of 10-12 projects to be presented during the workshop (including thematic focus area and budget). *See next slides for guidance.*
- The list of 4-5 'Windows': strategic topics that a team is listening for. *See next slides for guidance.*

- Identify relevant strategy documents to share with the workshop Facilitator.
- Share current project development focus areas with workshop Facilitator.
- What does someone from outside the country need to know? For examples;
 - basic facts
 - key challenges
 - current affairs
 - recent publications or media report
 - cultural information

- Other items to consider/decide on:
 - Have you decided on the format of your workshop and begun preparing the logistics?
 - Set up a shared folder for the workshop where the planning team can share documents, project presenters can upload their completed templates.

- Completed Statement of Intent:** Your Statement of Intent is the backbone of this whole process because you will continue to return to it throughout the exercise. Make sure it is as complete as possible, and that it truly reflects the realities of what you wish to achieve. *See more on the following slides.*

Setting Your Strategy

Instructions

Set the objective of the Sensemaking workshop

Critical for senior management to lead a discussion with the appointed focal point(s) and other relevant colleagues to articulate:

- **Why is the team doing this portfolio Sensemaking exercise?**
- **Why now?**
- **How can Sensemaking contribute to advancing the team's impact?**

The aim is to set out a concrete objective for the Sensemaking Workshop that will you will continue to return to.

Example: *Stress test our new project and generate learning from the abstraction from projects about synergies and levers of change that could be used more strategically in the next project cycle.*



Sensemaking Workshop in UNDP Timor-Leste February 2020

Selecting Your Portfolio Projects

Instructions

After the initial planning call, the team must select a list of **10-12 projects** to be presented during the workshop. We recommend 10-12 projects so that we have enough mass to be able to comfortably identify patterns and confidently extrapolate the insights and patterns beyond this subset of projects to the broader team portfolio.

Project Selection Principles:

Select a diverse range of projects from your overall portfolio that are representative of your team's work. A potential criteria for selection can be:

1 SCALE

- one big
- one small
- one typical

2 TYPE

- one environmental
- one social
- one economic
- one governance
- other

3 CHALLENGE

- one hard
- one easy
- one different

4 RELATIONSHIPS

- one with political relevance
- one that resonates with our partners
- one that is generating a lot of internal excitement



Sensemaking Workshop in UNDP Timor-Leste February 2020

Determine Your Windows

Instructions

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 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 office. The key guiding question through this process is:
What do you need to learn about your portfolio?

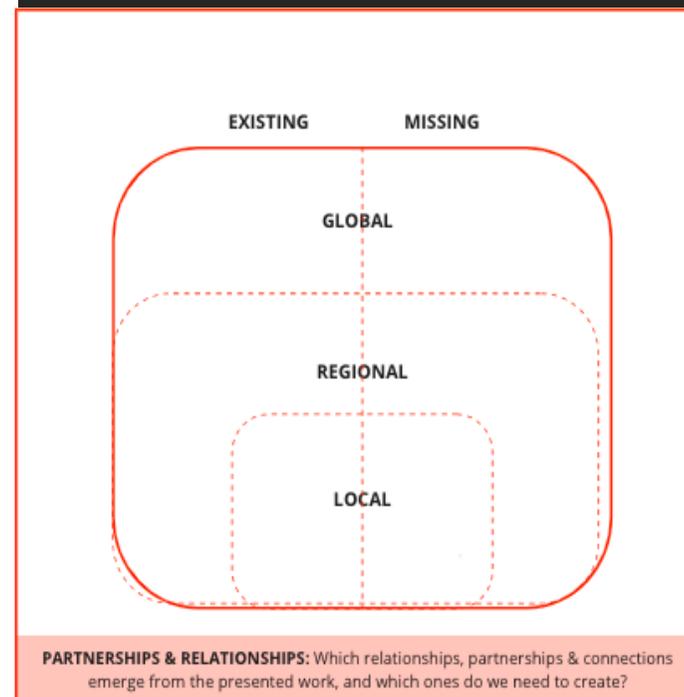
Examples of other Windows that could be used include:

- **Levers of change:** What instruments are used to drive change?
- **Gender:** How is gender integrated in our work?
- **Pandemic impact:** What challenges and opportunities were unlocked?
- **Ways of working:** How do we work as an office?
- **Emerging opportunities:** What are our 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 mappers will be required to listen for insights of patterns related to their respective Windows only.
- It will be important to organize a preparation meeting with the Window Mappers in advance.

Window Mapping Templates



Note: Once the Windows have been selected, the facilitator should update/develop new visual window frames as needed (like the example here) for the mappers to use.

Pre-proposed designs for some windows can be found in [Sensemaking supplementary materials available on UNDP website](#). These are just suggestions. You can design your own.

Pre-workshop Checklist: 2-3 Weeks Out



The Checklist

- Confirm your list of participants and their roles with the facilitator and send out calendar invites blocking their time for the Workshop (remembering some only join for Day 1, while others will for the entire time).
- Schedule a practice run with Mappers in advance of the workshop to introduce them to the windows and mapping process. Ideally this happens a few days in advance of the workshop.
- Ensure all preparation work (e.g. Any consultations, Futures analysis, etc.) is moving accordingly to schedule.
- Start drafting opening remarks for Head of Office.
- Ensure Statement of Intent is being worked on.
- Ensure that you have adequate supplies and logistics for the format of the workshop.

- Key questions to answer:
 - Have you planned your room set-up (if in-person)?
 - Do you have the online tools necessary (i.e., Zoom, Miro)?
 - Do you need additional facilitation support? Remember to give people a lot of notice!
 - Book the right kind of conference room that will allow for the set-up.
 - Confirm who will present each project, and ensure they have the project presentation template. Ask them to complete and upload to a shared drive in 1 weeks' time.
 - Are you familiar with Covid-19 contingency plans or restrictions on your office, and if necessary do you have a backup plan for a virtual gathering?

Pre-workshop Checklist: 1 Week Out



The Checklist

- Ensure all the project presentation templates have been received and uploaded to a shared drive, so you have time to review them in case clarifications/revisions are needed.
- Ensure the Statement of Intent is finalized this week.
- Send instructions to help clarify expectations of Project Presenters.
- Have the preparatory session for Mappers to introduce them to the windows being mapped, to assign windows in advance, and do a practice- run.
- Ensure the virtual workspace (e.g., Miro) is correctly designed and set up for the session.
- Ensure the Facilitator's presentation slides for the workshop are updated and ready to go.

Supplies you will need for an in-person workshop



Multi-colored Sticky Notes 3 inch x 3 inch
x 12 packs (5 pads per pack)



Multi-colored Sticky Notes 1.5 inch x 2 inch
x 5 packs (4 pads per pack)



Black Markers
x 40



Masking Tape
x 5 rolls



Flipchart Paper
x 6



Flipchart Stand
x 6



Moveable Whiteboard (only if available)
x 1

03

DURING THE WORKSHOP*

* Please use the companion Facilitator Guide which provides detailed guidance on how to run the session.



Workshop Day 1: Portfolio Sensemaking

Participants


Presenters
 10-12


Listeners
 8


Mappers
 4-6 (1 per window)


Facilitator
 1


Timekeeper
 1

Materials Required


PowerPoint Presentation

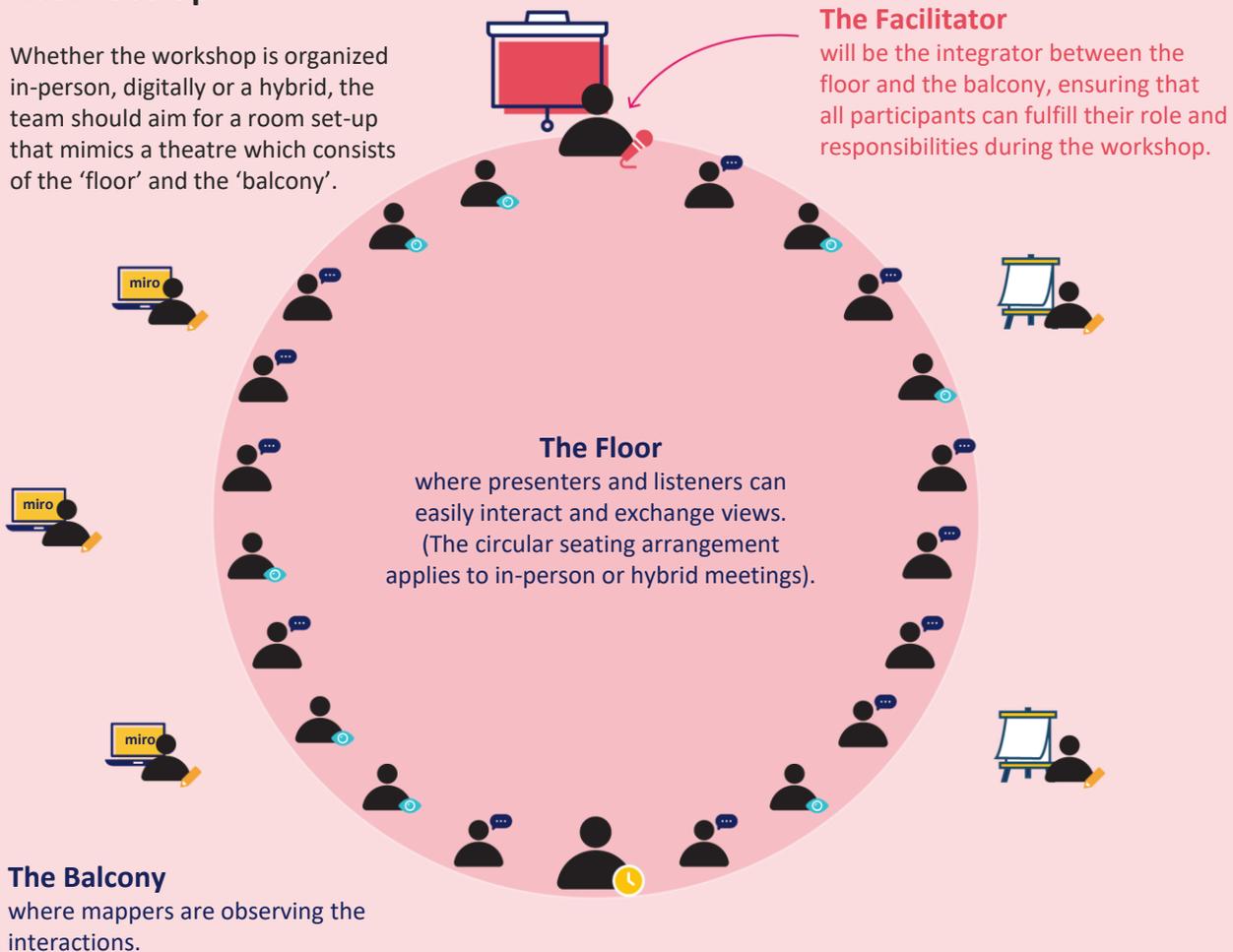

Facilitation Platform


Digital Workspace


In-person Workspace

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'.



Workshop Day 2 & 3: Portfolio Intelligence Generation

Participants



Listeners
8



Mappers
4-6 (1 per window)



Facilitator
1

Materials Required



Powerpoint Presentation



Facilitation Platform



Digital Breakout Rooms



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.

Window 1



Window 2



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.



Window 3



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

Window 5



Window 4



04

POST WORKSHOP ACTIONS



After the Workshop

Post-workshop Outputs

Workshop Book

The Workshop Book documents that were produced by each team at each step of the workshop (through a combination of photos and text). The primary objective of this report is to remind people of the flow of conversation that took place to arrive at the action plan (and to guide them, should they choose to run the process again). It is best for physical events.

Intelligence Report

The Intelligence Report is a summary, containing:

- The Statement of Intent,
- The Claims, Propositions, and Action Plans that were synthesized during Days 2 and 3 of the workshop.

This report (either a Word document or a slide deck) can be more easily disseminated across the office and used for follow-up on the proposed action plan with colleagues.

Online Workbook

We recommend that teams use an online collaborative board and convert their sticky notes and flipcharts into this document as an office knowledge asset that is easily accessible by anyone in the team at any time. It can replace the Workshop Book.

What to create and when:

- Physical Event: Workshop Book, Intelligence Report and online board
- Virtual and Hybrid Event: Intelligence Report and online board

Post-workshop Engagement

To create office-wide momentum to discuss the findings and move forwards, follow this process:

1. Discuss the first draft of the Intelligence Report with Sensemaking team from Day 2 to Day 3, as a follow-up to the workshop. This will ensure buy-in to the action plans that are subsequently created.
2. Share the final Workshop Book/Online Workbook and Intelligence Report with the workshop participants and wider colleagues within 10 days of the Sensemaking session. This is to socialize what took place, and get greater office buy-in and support for the proposed action plan.
3. Ensure that Senior Management are brought into this process and have sight of the final products. Ask them to share the final products to ensure maximum engagement!

05

HANDY TEMPLATES



Statement of Intent Template & Presentation Guidelines

Template

Use the Statement of Intent Template to present and structure relevant information about the team's intent.

Presentation

Building on the industry/country context, the Head of Office starts the workshop by presenting the office's Statement of Intent—a key frame of reference for the Sensemaking process.

The presentation could use the following narrative structure:

1. Start with the **role that the organization wants to play** in relation to the industry/country's development
(Our identity: WHO we are, our role)
2. Follow with the **transformative development effects** that the organization wants to contribute to in the industry/country
(WHAT do you want to transform/have an effect on, and what broader impact in the team will this have?)
3. The distinct and enabling team resources and capabilities
(Our STRENGTHS that support us to do the work we want to do, and where)

Ideally the Statement of Intent has already been shared with participants in advance, but regardless, following the presentation, participants will have the opportunity to ask questions and discuss the Statement.

Note: For the intent to resonate with the workshop participants, the purpose of the Sensemaking session needs to be clearly communicated and understood prior to the session.

Statement of Intent

The intent of the UNDP Country Office is a key frame of reference for the Sensemaking workshop. This statement of intent helps us to better articulate and understand what development effects is the country seeking to accelerate, what role the UNDP understands itself as playing, and how its distinct capabilities and resources are aligned to this intent.

What role does UNDP want to play in _____? - OUR
IDENTITY

What are the top 3 (transformative) effects we want our CO
work to have/support...? -WHAT WE WANT TO ACHIEVE, AND THE
BROADER IMPACT

The distinct CO capabilities and resources we have and can leverage (to induce these effects) are:
- OUR STRENGTHS

Example only - editable version with detailed instructions can be found in [Sensemaking supplementary materials available on UNDP website](#). These are just suggestions. You can design your own.

Example of a Statement of Intent

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.

Project Template and Presentation Instructions

Template

Use the Project Template to represent and structure relevant information about your project for the workshop.

Presentation

During the workshop, all presenters will have 5 minutes to share their project with the group. The presentation should use the following narrative structure:

1. Start with WHY (problem space)

What problem is this project trying to solve, and WHY is that even a problem? Why is the organization doing this project?

2. Follow with HOW (desired outcome)

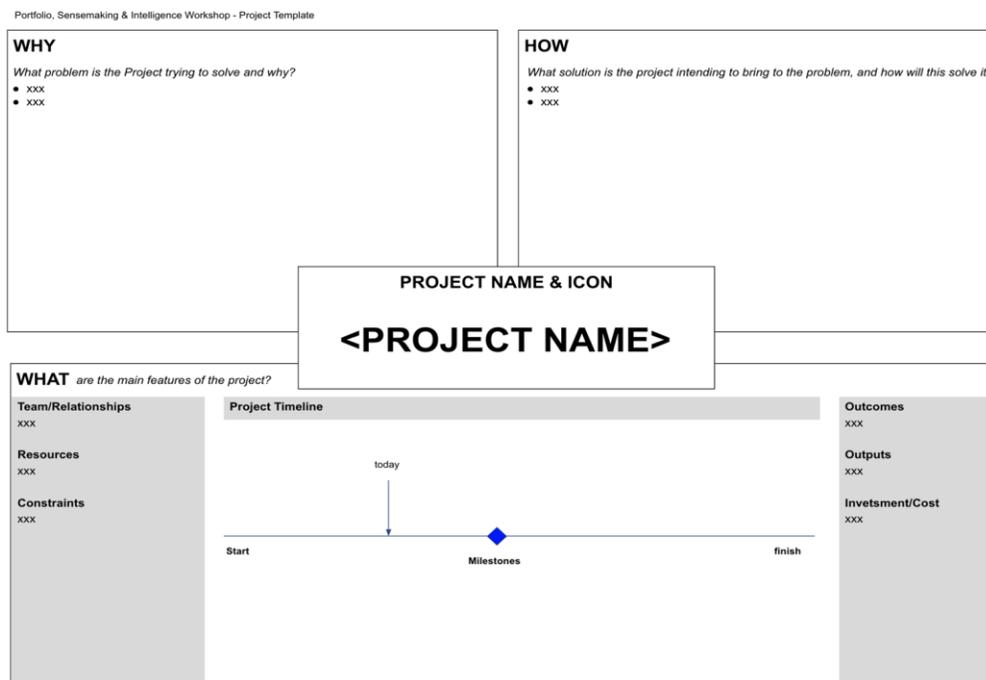
What solution is the project intending to bring to the problem? Why this solution over other options? What is the intended outcome?

3. Finish with WHAT (what are the main features, and what have we learned)

Who are we working in partnership with?
What resources (non-financial and financial) does the project use?
What are our learnings, and constraints? How have we been affected (good and bad)?
How have we adapted our work to respond to disruptions/shocks (pandemic, natural disasters)?

Following the presentation, listeners and mappers will have 5 minutes to ask follow-up questions about things they want to learn more about or what they did not hear in the presentation.

Note: Depending on the type of patterns/insights the team is looking to identify, additional questions can be added to the template by the facilitator before sharing with presenters.



Example only - editable version with detailed instructions can be found in [Sensemaking supplementary materials available on UNDP website](#). These are just suggestions. You can design your own.

Example of a Completed Project Template

Portfolio Sensemaking Workshop - Project Template

<p>WHY 2 min</p> <p><i>What problem is the Project trying to solve and why?</i></p> <ul style="list-style-type: none"> The need to promote legal empowerment and ensure justice to all, in particular vulnerable groups is an utmost national priority especially when X is experiencing rapid changes as a new middle-income-country. Support the implementation of improvement of legal system and judicial reform strategy <p><i>Further prompts to consider: Why is UNDP doing this project versus someone else?</i></p> <ul style="list-style-type: none"> UNDP has engaged in support for legal and judicial reform in X for nearly two decades Rule of Law and access to justice are two priorities of UNDP in the CPD and OSP 	<p>HOW 2 min</p> <p><i>What solution is the project bringing to the problem, and how will this solve it?</i></p> <ul style="list-style-type: none"> Increased public awareness, understanding and how to invoke rights. Increased access to legal advice, assistance and representation in civil and criminal matters. Improved enabling legislative and regulatory framework for legal empowerment and access to justice. Enhanced integrity and transparency in the justice sector. <p><i>Further prompts to consider: What other solutions were considered? Why this solution over the others?</i></p> <ul style="list-style-type: none"> Promoting digitalization of justice services, starting with legal system, legal dissemination Promoting gender sensitiveness in providing legal services Institutional capacity building for sustainable impact 	
<p>PROJECT NAME & ICON</p> <p>2017-2022</p>		
<p>WHAT <i>are the main features of the Project?</i></p> <p>Partners/Relationships Government agencies, esp. Ministry of Justice, Supreme Court, Central Committee for Internal Affairs</p> <p>Resources X Fund; long term partnership with Ministry of Justice; good cooperation with UNXXX, local communities</p> <p>Constraints</p> <ul style="list-style-type: none"> Changing of government priorities leads to changing of planned activities; Delayed implementation because of Covid; Publication of study reports; Limited involvement of CSOs <p>Gender</p> <ul style="list-style-type: none"> Improving legal framework for ensuring equal access to justice Analysis on gender-differentiate needs on legal services and identify appropriate interventions 	<p style="text-align: center;">MILESTONES</p> <ul style="list-style-type: none"> 2018: X 2019: X 2020: X <p>UNDP's Role in project: <i>Leading role in cooperation with UNXXX</i></p> <p>Total Budget (USD) \$XXX</p>	<p style="text-align: right;">2 min</p> <p>Outcomes</p> <ul style="list-style-type: none"> To strengthen the rule of law through a more reliable, trusted and better accessed justice system To increase access to justice for vulnerable groups and in particular for women, children, ethnic minorities, and poor people <p>Learnings</p> <ul style="list-style-type: none"> Sustainability of activities is crucial Pre-test and pilot training using modern adult-centered learning methodologies are crucial to persuade persistent partners <p>Pandemic impacts/response/new opportunities</p> <ul style="list-style-type: none"> Flexible and adaptive working methodologies tailor some of the activities to address imminent issues that undermine justice and deepen inequalities in the context of the Pandemic

Glossary

Sensemaking - an activity, a process that extracts insights, induces learning and creates meaning from experience.

Protocol - a system of foundational concepts, and an architecture of principles that allows us to derive rules, terms of reference and 'how-to' instructions.

Portfolio - a learning and sensemaking system that can be leveraged to accelerate effects and induce system transformations.

Intelligence - the formalized and generative outcome of sensemaking with which acceleration is induced.

Foresight - "systematic, participatory, future-intelligence gathering and medium-to-long-term vision-building process aimed at enabling present-day decisions and mobilizing joint action"

Hybrid events - Events that combine a physical and virtual presence, for instance with some of the audience participating virtually while others share a physical space

Technical/Programmatic activities - Work that fits within a broader theme e.g. all your work on the topic of healthcare

Frequently Asked Questions

Why might you want to run a Sensemaking workshop?

Consider it if you are looking to have a structured conversation with your team on how you can learn and create meaning from your current work, and identify ways to drive greater coherence, impact and relevance to the needs of your stakeholders. The process is meant to provide a dynamic and active way of shaping (and managing) a portfolio of projects, programmes and/or a set of policy interventions such that they are continually coherent with the changes on the outside of the organization. Insights generated can also support in pipeline development and resource mobilization efforts.

How long does a Sensemaking workshop take to do?

The Sensemaking workshop itself takes about 3 days (ideally consecutively; requiring approximately 4.5 hours each day). However, there is also pre-workshop preparation, and post-workshop follow-up time that needs to be considered. Given this is a strategic process, prior participants would say the preparatory work is spread over 4-6 weeks in advance of the session (taking on average 3-4 days in total on the part of the focal team). The post-workshop follow-up is ongoing and subjective to the senior management and focal team's plan on driving the new action plan into place.

Who's required?

As a strategic process, senior management engagement and support throughout the process is critical for its success. That said, we recommend a mix of technical/programmatic and operational colleagues (from various levels) as participants for the workshop, and in terms of numbers, we recommend no more than 20-25 total participants on Day 1 and 8-10 participants staying on for Days 2 and 3. Sensemaking is like theatre where every participant has a particular lead role they are assigned to play (the guides have more details on this).

Is this a strictly internal exercise or one where people outside the organization can also participate?

In our experience, most offices prefer doing this deep reflection as an internal exercise first. Here external participants can be engaged in the form of consultations (to inform the Statement of Intent) or provide opening panel on Day 1 (offering a provocation and a different perspective on issues). Once the team has a shared understanding, this process can then be repeated and run with external stakeholders.

Frequently Asked Questions (continued)

What has this process led to for teams that have done it before?

Teams have used the process in a variety of ways—identifying where they want to invest in the next project development cycle; identifying pipeline opportunities to pursue; generating content to inform their integrated work plans and corporate monitoring & evaluation submissions; or on changing the way that they work as a team/an office to collaborate or cut across silos.

Can I pair this with any foresight activities?

Yes, absolutely! In fact, we recommend this if you are undertaking Sensemaking in advance of long-term strategy setting, or after a significant event where the landscape is changing very fast.

Are there any reading materials or blogs about this?

Plenty! You may find blogs written by both UNDP Innovation teams and Country Offices on the medium pages of UNDP [Asia-Pacific Regional Innovation Centre](#) and the [Global UNDP Innovation](#) pages.



ASIA AND THE PACIFIC

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