

BLUE SOLUTIONS







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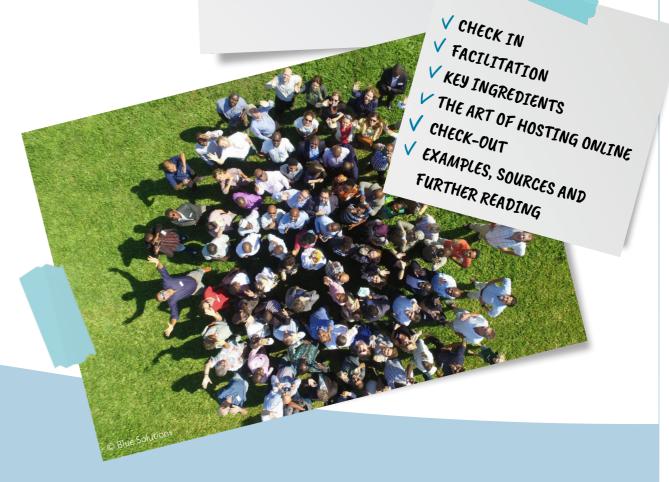


of the Federal Republic of Germany









ENGAGING PRACTITIONERS AND FOSTERING INTERACTIVE DIALOGUES

A FACILITATION TOOLKIT

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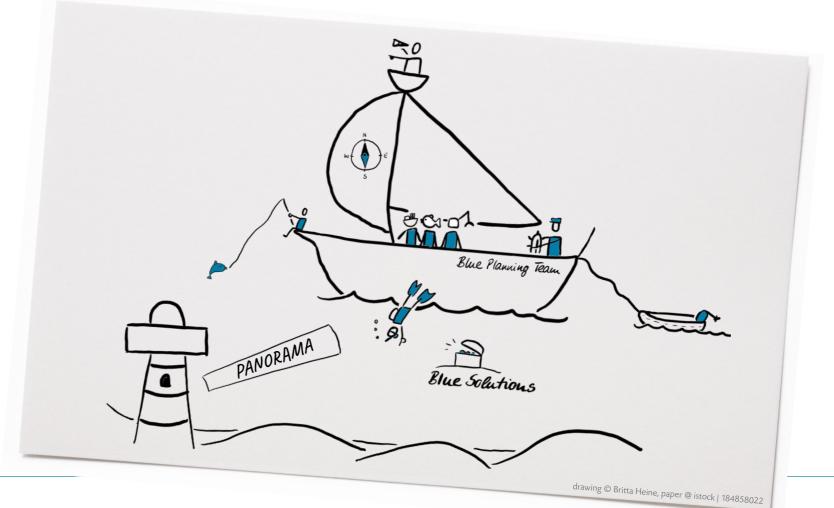
1. BLUE SOLUTIONS, PANORAMA & THE SOLUTIONING APPROACH

PANORAMA is a partnership initiative which documents, collates and promotes examples of inspiring, replicable solutions across a range of conservation and sustainable development topics, enabling cross-sectoral learning and inspiration. PANORAMA allows practitioners to reflect on and share their experiences, increase recognition for successful work, and learn from peers how similar challenges have been addressed around the globe. We believe that practitioners seeking solutions for a specific challenge (solution seekers) benefit from building on existing knowledge. Ultimately, the replication of solutions from the platform is one of the main objectives of the PANORAMA initiative.

Key components of a solution are identified and organised in replicable 'building blocks', alongside the context in which the solutions were implemented. A solution is a specific aspect of work or a process undertaken to solve a particular issue, problem or challenge. The collated solutions are shared on the online platform and through publications and selected communication channels. They are also integrated into capacity development activities and featured at networking events. This methodology for learning and innovation is applicable across topics, sectors and audiences. We have termed this method of documenting, sharing and supporting the replication of successful experiences the 'Solution-ing Approach'.

This toolkit provides guidance for the design and facilitation of PANORAMA tools for matchmaking, exchange and solution uptake. It provides examples from our practice. At the same time, most of the guidance and tools offered herein can be applied to other virtual and on-site workshop formats.

Furthermore, this toolkit lays out copious insights from Blue Solutions practice. The Blue Solutions Initative advocates for healthy oceans for sustainable development. It is implemented by four leading environmental and development institutions: GIZ, GRID-Arendal, IUCN and UNEP. Blue Solutions hosts the marine and coastal thematic community at PANORAMA and fosters global knowledge exchange and capacity development for marine and coastal biodiversity.





What is uptake?

In the context of PANORAMA, uptake of solutions and building blocks is broadly understood to mean actions inspired through the replication, adaptation and transfer of solutions and building blocks. It can take place at different levels, through various formats and by numerous actors. Uptake at the individual level might involve use of the Solution-ing Approach and its formats by solution providers and seekers. At the institutional, organizational or community level, uptake could entail adapting an overall methodology and solutions portfolio to support practitioners and decisionmakers.

What generates uptake?

One step towards the successful replication or adaptation of solutions or building blocks is peer exchange between solution seekers and solution providers; we support this so called 'matchmaking' through on-site or virtual workshop formats. Using the Solution-ing Approach or utilising the solutions portfolio requires the ability to use and adapt existing solutions, the openness to learn from peers and the skills build on current knowledge. Successful uptake also depends highly on the context, partners and goals. Often, time is a key component to a successful story.

The art of facilitation

Once potential candidates are identified for a matchmaking process, another question arises: How can we ensure that relevant discussions are initiated which pave the way for fruitful future collaborations?

This leads us to the importance of meaningful facilitation. Whilst is it important to seek the right partners for the matchmaking process, it is also vital that online and in-person dialogues are facilitated in a way which enables positive experiences, fosters time for reflection and encourages peer exchange. The initial stages of good facilitation empower participants to build trustful relationships, continue the dialogue and organise future in-person meetings. This toolkit, based on multiple approaches and experiences, aims to guide you through the subtle art of facilitation.





2. CHECK-IN

This toolkit should feel like a good workshop or meeting, so we will begin the same way: with a check-in. It offers the opportunity to be transparent about how we are doing and what is on our mind.

How often are you sitting in workshops or meetings and feeling bored, thinking that your contributions are not valued or suspecting that you are wasting your time and effort? Maybe you believe that's just the way it is. We are convinced that things can be different; the art of facilitation can bring meaning and liveliness to (virtual) meeting rooms! We want to challenge common assumptions of workshops. Your facilitation can create better workshops every time, even in a virtual room. This toolkit is not about workshops in which one speech or presentation follows another, nor about panel discussions or events where information flows unidirectionally. This toolkit is about target-oriented, interactive workshops, in which participants encounter one another on equal footing. We believe that only such workshops can bring about change, a positive spirit and action.

To do so requires mindful facilitation. That is the objective of this toolkit: to provide guidance and resources to practitioners on facilitating effective, meaningful and fun (virtual) workshops that enable the uptake of solutions for a healthy planet.

The toolkit builds on our own experiences and draws on the work of "Kommunikationslotsen' Marvin Weisbord and Sandra Jannof, Nancy Klein, Christina Baldwin and Ann Linea and other facilitators (see Sources & further reading). It provides a general introduction to the art of hosting and The Circle Way, which is especially relevant to read if facilitation and co-creation is relatively new to you. If you are an "old hand', hopefully you will also find new inspiration, especially regarding the virtualization of workshops.

A checklist containing the key ingredients necessary for meaningful, effective and fun workshops and meetings (on site and online) is also provided. You may consider using this list during the actual preparation phase for a virtual workshop or meeting, or to note what still needs to be done.

One full chapter focuses on the particularities of hosting online and contains hints on technology, roles of the hosting team and what to consider before, during and at the end of a virtual meeting or workshop.

In addition, the toolkit contains an exemplary script of a virtual matchmaking workshop, a facilitation script template and a selection of further readings for those who wish to dive deeper into the topic.

Now, it's your turn! Before we provide some ideas, take a moment to reflect. When do you enjoy meetings or workshops the most? How do these interactions help you to feel alive and effective?





3. FACILITATION: CIRCLE & THE ART OF HOSTING

The term 'facilitation' refers to the act of helping other people deal with a process, reach an agreement or find solutions without getting personally or directly involved. Facilitation is also a mindset characterised by openness, equanimity, compassion, and curiosity.

THE CIRCLE SETTING

Many individuals and their experiences have helped to expand facilitation methodologies over decades (see Sources & further reading). One significant aspect of facilitation and the art of hosting is the circle setting. This is a powerful collaborative conversational approach to exchange knowledge and personal experience, gain new insights and bring meaningful conversation to the surface.

For thousands of years, people have formed a circle around the fire to share knowledge, experiences, and stories to care for and organize themselves. Christina Baldwin and Ann Linea and David Bohm and Scott Peck are important ambassadors of the circle practice, bringing it to contemporary organisations as a conversational methodology. The circle setting is based on three principles:

- + Rotating leadership
- + Sharing responsibility
- + Relying on wholeness



The circle center is a focal point that provides a neutral space, a sort of common ground where diversity of thought, stories of sorrow, outrage and joy can be said, held and considered by all participants. The more emotional a conversation gets, the more important the circle center becomes. In practice, the center in The Circle Way can be a neutral object or—as in the case of the picture above—objects that participants have brought to illustrate their view on the issue at stake.



Three roles are important for the functioning of the circle. The host prepares the ambiance of the circle like the host of a dinner party. The centre of the circle setting is a focal point that provides neutral space, a middle point between people which, in practice, can be a candle, a bouquet of flowers, or pictures related to the topic. The host sets up the centre, holds the space for conversation and participates in the conversation as it occurs. Usually only one person speaks at a time. This can be managed by using a talking piece or following an agreement.

A **guardian** helps to fulfil the circle's social contracts, timeliness, and focus. He or she mindfully watches the energy and gives signals to pause, as necessary. The guardian holds a pleasant noise-maker (a chime or singing bowl) and has the group's permission to interrupt the process for the purpose of slowing down a high-speed conversation to (re)focus on the intention, or to focus on the agreements. This role could be taken either by the co-trainer or a participant.

Depending on the intention and setting of the circle, a **scribe** may need to take notes to catch the essential thoughts of a conversation or record a decision that has been made. For example, the scribe could document insights gathered in the reflection sessions of a training workshop.

The circle setting can be used in workshops in various ways. For example, each day can begin with a meaningful question on which everyone can share thoughts (checkin), or, to start a workshop with a personal touch, by asking participants to bring an object that symbolises the training content and share its meaning in a circle.

In addition to the circle setting, the following principles are fundamental to the art of facilitation:

- + Focus on the future: Designing an ideal future generates far more positive energy than attempting to solve old problems.
- + **Get the whole system in the room:** It is easier and quicker to find solutions, if all relevant people are involved in the process.
- + Every opinion is important: People have different opinions and perspectives; only considering all of them provides a true holistic view.
- + Change requires flexibility and emotional involvement: Nobody can motivate another person or force them to make a commitment. Motivation and commitment always come from within the individual. However, you can create the circumstances for fostering emotional involvement.





A GENERAL WORKING PRINCIPLE

'Control what you can. Let go what you can't.'
Sandra Jannof and Marvin Weisbord

As noted in the section above, facilitation is a mindset. A mindset is something that cannot be learned through instruction or reading, but rather develops through experience. Following the principle, 'Control what you can. Let go what you can't.' can help create the space for meaningful conversations and effective workshops that are fun and energizing, both on site and online.¹



Control what you can:

Your own behaviour: A high level of self-awareness is key to effective facilitation. Being aware of your own emotions enables you to apply your own feelings to the process or the dynamic of the group. It also involves creating a safe space where people can show their whole personality and unleash their full potential.

Planning: The planning phase can leverage the success of your facilitation. It focuses on clearly defining the objective and creating the necessary conditions, such as participant selection, appropriate and encouraging method choice, and the development of a pleasant atmosphere. Even if the best possible conditions are created during the planning stage, the process or discussion may run differently than originally planned. In this instance, facilitation skills are required to steer away from the prepared agenda and work with what is happening in the group.

Let go of what you can't:

Motivation and commitment: Motivation or commitment cannot be forced but must come from within the individual. However, unfavourable circumstances such as minute controlling, rigid guidelines or feeling unheard can work against natural motivation.

Results: In a complex world characterized by ambiguity and uncertainty, disappointment is pre-programmed if one assumes that goals and outcomes are always achieved according to plan. Sometimes (in fact very often!) it makes more sense to abandon control and remain calm when things develop differently than one thought or would like.



1 The whole section is adapted from: Scholz, Holger & Roswitha Vesper (2017) & Marvin Weisbord & Sandra Jannof (2007).



TIPS FOR FACILITATORS:

Always assume the best The actions of individuals, intention groups and entire organizations are motivated by good intentions. Curiosity (instead of annoyance) helps us to find the good intention in others. It also helps us to handle errors with respect.

Choose words carefully

The language we use conveys what we think and reveals how we create our reality. It therefore makes a difference which words you select. Be a role model for straight-talking, lively and positive language.

Do less to achieve more and share responsibility

If you want participants to assume responsibility, do less than you are used to. If you hold back, others will take over naturally.

Respect independence and freedom

Always remember to promote self-organization, transparent communication and voluntary actions. Enable participants to discover their skills!

Nurture relationships

Always be open to in-depth meetings and relationships, especially in difficult phases. Practice speaking about essential matters with your partners, and do not only facilitate change in their minds but also in their hearts. Every change first involves a self-transformation.

Explore the system

Explore and analyze the system together with partners and participants and carry out a joint examination. All of those involved become researchers of their own systems.

Do less telling and encourage listening

The quality of our work depends on the mental preparation done beforehand; it is informed by the way we treat each other. Enable environments that allow people to think for themselves with rigor, imagination, courage and grace.

Remember: 60 minutes face-toface equals 90 minutes in virtual formats

When planning digital presentations and exercises, remember that things might not go as smoothly as in person. Adjust your schedule to account for technical failures, bandwidth issues or extra time for participants to get used to virtual settings.

Leverage silence

Silence is a valuable contribution to achieving goals. Silence can help to amplify your inner voice, and refocus on what is or was important. Saying nothing is often the right approach. When things appear to be getting too much, silence is often more helpful than a heated discussion.

Stick to the 7-minute rule

Remember to keep presentations interactive and as short as possible. In a virtual setting, participant attention typically lasts for 7 minutes - so, integrate a short interactive segment, enabling new stimulation and interaction.





4. KEY INGREDIENTS FOR MEANINGFUL, EFFECTIVE AND FUN WORKSHOPS ON SITE AND ONLINE

WORKSHOP PREPARATION CHECKLIST

The following checklist can help you to design and prepare a meaningful, effective and fun Solution-ing and/or uptake workshop:

WORKSHOP TITLE		NOTES
OBJECTIVE & PURPOSE	The purpose and objective of the workshop is clear. Ask yourself: Why do we need this workshop? What do we want to achieve? Either involve participants in the formulation of the objective or communicate purpose and objective in the invitation.	
WORKSHOP FORMAT	The format of the workshop is clear and communicated to participants. Once you know the purpose of the workshop, ask yourself: What format or method would be suitable to achieve the objective?	
VENUE, DATE AND TIME	The venue provides an open and inviting atmosphere. Ask yourself: What requirements do you have regarding the venue or setting? When will the workshop take place? Is the timing suitable? Are all participants able to arrive on time?	
PARTICIPANTS	The people who are really necessary for the workshop are present. All participants want to participate. No one is being sent to the workshop. Ask yourself: Who should participate to achieve the objective? Applying the following formula² to identify participants helps to get the 'whole system' involved. Involve participants that ARE IN and have: • Authority to act on their own • Resources of time, money, access, and influence • Expertise – social, economic, technical – on the topic • Information required by others • Need, as they will be affected by the outcome.	

2 Source: Weisbord, M. & S. Janoff (2007)



Agenda	An agenda provides orientation. It is shared with all participants in advance. The agenda includes meeting preparation guidelines.	
Invitation	The invitation encourages involvement. It contains the purpose and objective of the workshop, as well as an agenda.	
Facilitation	Facilitation roles are distributed. Who facilitates the workshop? Who supports the facilitation? Who is providing technological support?	
Material & technology	Material and technology needs are clear and prepared. What materials do you need? Who takes care of providing material? What technology and virtual tools do you need? Do all have access and know how to handle these tools? If you are planning to introduce a new technology, ensure that knowledge about this tool is shared in advance with the participants. This can be done by sharing manuals, online trainings or Question & Answers sessions for clarification.	
Facilitation script	A facilitation script helps you and the facilitation team design the overall process and each step of the workshop. It is more specific than the agenda and should contain information on timing, methods, material, digital tools and responsibilities (see Annex 1 and 2).	
Commitments and working principles	All participants formulate and commit to rules that support learning and collaboration. Ask yourself: What commitments would enhance learning and collaboration? Find examples here: Helpful workshop guidelines	
Check-in & check-out	The workshop starts with a check-in: All participants share how they are and what is on their mind. The meeting ends with a check-out: All participants reflect on the workshop, including how it went and wishes for the next time. Ask yourself: What would be an inspiring question? What question could help participants to open up? What question could strengthen a sense of community? Find examples here: Questions for all seasons	



'Parking lot'	The parking lot serves as a place to store anything that you want to return to or need to move to another moment in time. It can include questions, ambiguities, objections, concerns, wishes and ideas. These will occur in every workshop. Some can be tackled within the workshop timeframe; others must be tackled after the workshop. It helps to have a dedicated parking lot to collect these tensions	
Documentation	Someone documents the main points and shares the protocol after the workshop. Ask yourself: What needs to be documented (in what form) and who is responsible for that?	
Next steps	At the end of the workshop, next steps are formulated and documented. Responsibilities and commitments are clear. Change processes require a cause, a vision and next steps. Thus, at the end of the workshop, create concrete and tangible next steps. Formulate them as a desirable condition, e.g. the new solution is curated and available on the PANORAMA platform.	





HELPFUL WORKSHOP GUIDELINES (PRACTICES OF SUCCESS):



Share responsibility for the quality of the meeting.

Facilitators and participants alike impact how the meeting unfolds.



We put our mobile phones on silent mode and do not use them during the sessions.





Words should be consciously chosen, and responsibility taken for what is said. Acknowledge other viewpoints and refrain from making hasty presumptions.



Contribute and be willing to learn for the wellbeing of the group.

The focus is on group d evelopment and the issue at stake rather than individual interests.

All participants are equal.

Everybody gets a chance to speak. No one is interrupted. COMPREHENSION QUESTIONS

ARE ENCOURAGED.

Listen attentively and compassionately.

Acknowledging a speaker's good intention and valuable perspective helps to access collective wisdom.



Questions for focusing collective attention on your situation:³

- → What question, if answered, could make the biggest difference to the future of your specific situation?
- → What's important to you about the issue and why do you care?
- → What draws you/us to this inquiry?
- → What's our intention here? What's the deeper purpose (the big 'why') that is really worthy of our best effort?
- → What opportunities can you see?
- → What do we know so far/still need to learn about the situation?
- ightarrow What are the dilemmas/opportunities?
- → What assumptions do we need to test or challenge here? What would someone who had a very different set of beliefs than we do say about the issue?

Questions for connecting ideas and finding deeper insight:

- → What's taking shape? What are you hearing underneath the variety of opinions being expressed?
- → What's in the centre of the table?
- → What's emerging here for you? What new connections are you making?
- → What had real meaning for you from what you've heard? What surprised you? What challenged you? What's missing from this picture so far? What is it we're not seeing? What do we need more clarity about?
- → What's been your/our major learning, insight, or discovery so far?
- → What's the next level of thinking we need to do?
- → If there was one thing that hasn't yet been said in order to reach a deeper level of understanding/ clarity, what would that be?

Questions for creating forward movement:

- → What would it take to create change on this issue?
- → What could happen that would enable you/us to feel fully engaged and energized about the situation?
- → What's possible here and who cares? (Rather than, 'What's wrong here and who's responsible?')
- → What needs our immediate attention going forward?
- → If our success was completely guaranteed, what bold steps might we choose?
- → How can we support each other in taking the next steps? What unique contribution can we each make?
- → What challenges might come our way and how might we meet them?
- → What conversation, if begun today, could ripple out in a way that creates new possibilities for the future?
- → What seed might we plant together today that could make the most difference going forward?

You can find more inspiration and questions online. Here are some weblinks for possible check-in and check-out questions:

- → Check-in Generator
- → Icebreaker
- → Question Archive



5. THE ART OF HOSTING ONLINE

'Probably the most important thing we've learned in over 15 years of online hosting is that it's not about the technology. It's about the engagement, the interaction, the conversation – in other words, participant experience. And to a great extent, the more technology can recede into the background, the better your participant's experience will be in the digital realm.' Amy Lenzo and FireHawk Hulin (2017)

In the following section, we will provide hints on how to facilitate meaningful, effective and fun virtual workshops. We will talk about technology and important roles, and guide you through the phases of preparation, design (beginning, middle and end) and follow-up of a virtual workshop.⁴

TECHNOLOGY

The main objective regarding the use of technology is to make things run smoothly:

- → Find a quiet and pleasant space where you will be undisturbed and/or use a headset to ensure that no background noises disturb the conversation. Check the audio settings beforehand.
- → Turn your video on whenever possible and be camera ready. Face the camera directly, which is visually appealing and gives participants the feeling of being seen. Also, ensure good quality lighting and choose an attractive real or virtual background.
- → Check your internet connection. Use a stable WLAN connection or an Ethernet cable.
- → Prevent distractions and avoid multi-tasking. Close any windows on your laptop that you are not actively using, deactivate notifications, turn off your phone, and don't check your e-mails.
- → Sign into the virtual room early to make sure things are working by the time you want to start.

- → If your meeting is part of a longer collaboration process, consider using a collaboration platform (e.g. MS Teams, Slack or Podio).
- → Despite all the technical possibilities, never forget to create room for good cooperation that is the main objective. The process should be fun and energising! (Yes, that's possible online!)





Below are a list of exemplary tools that we like to use.

TOOL	KEY FEATURES
Cardsmith	Tool for visual collaboration using post-it notes and creating system mapping
Conceptboard	Virtual whiteboard toolkit
Doodle	Free online meeting scheduling tool
Evernote	An organisational tool that brings all your ideas together in one single place
Mentimeter	Tool offering interactive presentations, polls and other data and opinions collection from participants using smart devices; gain insights on participants with trends and data export
MS Teams	MS Office video conferencing and collaboration tool
Miro	Online collaborative whiteboard platform to gather ideas, presentations and more
Mural	Digital workspace for visual collaboration where you can organize digital sticky notes in lists, flowcharts, diagrams, frameworks, methods and drawings
Prezi	Dynamic alternative to PowerPoint
Monday	Software that manages and promotes collaboration through visualization tools
Qiqo chat	Interactive and participative online event tool which provides a social wrapper around Zoom meetings; participants choose which breakout, panel, or workshop they wish to attend in real time
Slack	A real-time messaging platform that gathers all communication in one place
Sli.do	Live Q&A and polling for meetings and events
SurveyMonkey	A survey tool to ask, collect and analyse data

ROLES OF THE HOSTING TEAM

Meeting host: In charge of preparation (together with the hosting team and/or participants) and facilitation of the workshop, purpose and goal, agenda, and invitation. Large groups might require an additional meeting host to share the workload. It can also be more interesting for participants to listen to different voices and engage with different personalities.

Tech host: Responsible for technical support before and during the workshop. Also monitors the chat for technical issues and problems, questions, and contributions during the workshop, so that the flow of the meeting will not be interrupted. Sometimes it can be helpful for the tech host to support the meeting host with facilitation, e.g. facilitating group work in separated breakout rooms.

Guardian: It can be useful to assign someone to take care of the wellbeing of the group. This could be someone from the hosting team or a participant; it can also be a rotating role. Possible tasks include watching the time, monitoring the length of contributions, providing reminders about breaks, sensing the general mood or summarizing issues, if necessary.

Scribe: Documents results and agreements.

In a smaller group you can distribute the roles and responsibilities among less people. Experiment and do what feels coherent to you!



PREPARATION & DESIGN

Room: Online, the host and participants create the virtual room together. Good preparation includes stable technology, and a pleasant physical atmosphere for all (fresh air, a tidy workplace, something to drink and snacks).

Participants: After asking for permission, provide a list of participants. Create online name tags by having participants change their screen display name to include relevant details such as name, pronouns, location, etc., if the application you use allows.

Planning: Keeping the design simple contributes to a smooth experience. Assume everything will take longer online, as everyone is working harder to read body language, find the mute/unmute buttons, and more. Plan about 25% less content in comparison to on-site events, allowing more time for each topic.

Bear in mind that working online takes a different toll on the body than in-person processes, so build in breaks and body movement every hour or ninety minutes. You can even invite people to go offline during the session to journal on their own, create art, or go for a walk with a question in mind.

Invitation: Combine the invitation to the workshop with a request for participants to allocate extra time for the meeting, to become comfortable with the (possibly new)

technology and fully engage in the virtual context. Provide guidance on the use of the technology or tools and invite participants for a virtual cup of tea or coffee 15 –30 minutes ahead of the workshop to clarify technical issues. This is also a good chance to warm up informally.

Virtual circle: It is possible to create a circle experience online with some extra attention to detail. However, the need for a good design process doesn't change. A smaller group of twelve to fourteen participants can better mirror the intimacy of an in-person circle experience. Prepare a virtual circle (see example below) to help participants know when it would be their time to speak. To break the ice, a facilitator could invite a participant to speak first and then continue the round by following the circle. You may consider what to place in the centre, maybe a nice photograph or something that is of relevance for the group. If you don't go around in the circle, agree on how participants indicate their wish to speak (e.g. show of hands or chat). To create the practice of using a talking piece online, ask people to verbally acknowledge when they are finished by saying 'I've finished', 'talking peace to the centre', or similar.

Be ready: Before the actual meeting starts, ensure that roles and tasks within the hosting team are distributed, do a technology test, review your presentations and double-check that you are set up and ready to go.

GRAPH 2: VIRTUAL CIRCLE

Example of the Blue Solutions virtual circle



We were kindly provided with the portrait photos from the BLUE SOLUTIONS team



Host yourself: Hosting online can be strenuous due to several reasons. One reason is that our brain is not made for the kind of visual input that we receive. Make sure to not only host your participants well, but also treat yourself kindly. Keep track of your own energy resources. Find a quiet and pleasant space where you will be undisturbed, perhaps in a cosy chair. Prepare some coffee, tea, chocolate or fruit and take a few minutes to centre yourself before the workshop starts. Do what you need to do to feel comfortable and present. Virtual facilitation is particularly demanding and our attention tends to wander. Learn to become aware of what is going on in your mind and always return your attention to the participants and events happening in the virtual room.

AT THE BEGINNING OF THE WORKSHOP

Opening: Begin calmly by providing time and space for participants to arrive. Perhaps have background music playing through a Bluetooth speaker to help create the feeling of a warm, hospitable space. Having the video function on at the beginning enables people to notice and greet one another, encouraging connectedness.

During the opening:

- Invite people to cultivate a calm, focused personal space by shutting down unnecessary computer programmes or windows. This can also help reduce the load on their internet bandwidth. Provide clear orientation at the beginning and name the purpose and objective of the workshop.
- ☐ Clarify specific roles, such as meeting host, tech host, guardian, and scribe.
- ☐ Depending on the knowledge and experience of the participants, review relevant aspects of the technology (video, mute, hand sign, chat, views). Invite graciousness and patience as technology doesn't always work smoothly or as planned.
- ☐ Propose the agenda and agree on the meeting flow and timing.
- ☐ Establish workshop guidelines (practices of success).
- ☐ Introduce the virtual circle.

Interaction and engagement bring people to presence. Early engagement of participants is important. In a virtual setting, it is difficult to focus on a speech longer than 7 minutes. Therefore, take no more than 15 minutes on the welcome and introduction (preferably less) and elicit attendee participation or response as soon as possible.

Check-in: You may start with a question, a few moments of silence or sharing a meaningful object. You could visualize the question in the chat, so that all participants can see it (this can be especially helpful in large groups). Sometimes, if the group is too large or large group sharing doesn't match your purpose, individuals might be invited into small group dialogue instead. A quick check-in in a more intimate setting can be very effective.



DURING THE WORKSHOP

Be present and attentive, and make sure that everyone feels included. Be aware of the agenda and the actual process. Short summaries regarding the process and an outlook on the objective of the next session provide guidance to participants. Ask for feedback if you are uncertain.

In general, everything should be made more explicit in a virtual setting. For example, you'll need to ask explicitly for approval with a show of hands. Also bear in mind that language is everything when you're online. Not only the words you use, but your voice can also evoke other senses and experiences. What can you convey with your voice thorough tenor, rhythm, tone and pace? Think about it, and practice. What do you want to convey? Clarity? Openness? Invitation? Ease? Comfort? Welcome? Acceptance? Appreciation? Feel the words as you say them, and notice what changes in your voice. When you're online, you may find that sometimes you need just that little bit 'more' to project effectively – you might need to exaggerate slightly, repeat yourself once or twice or make things explicit that you might not otherwise. There's a fine line here - you don't want to dull the senses with repetition or be too obvious either.

For **collective harvesting** you can use MS Teams, Google Docs, Google Slides, Conceptboard, and more. Those who can't access the harvesting document can paste in the chat as a back-up option. In fact, many interactive workshop methods can be transferred to virtual workshops with just a little bit of technological preparation. Check the table below and the **Sources and further reading** section for several ideas.

To keep the energy level high, integrate periodic energizers. Energizers can serve as a room for reflection, trigger new impulses and stimulate the mind.

TRANSFERRING IN	TERACTIVE WORKSHOP METHODS	TO VIRTUAL WORKSHOPS AND MEETINGS
METHOD	OBJECTIVE	DESCRIPTION
Personal object	Activating participants	Ask participants in advance of the workshop to bring an object that represents the topic of the workshop, their personality, or something else. In the circle or in threes, everyone can show and explain their object
Secret buddy	Building trust between participants	The facilitator assigns secret buddies for everyone and informs participants individually in advance of the meeting or in a private chat. The secret buddy supports the assigned participants throughout the meeting as much as possible. At the end of the meeting everyone can guess who supported whom
Marketplace	Exchanging information	Use a virtual whiteboard to present participant ideas (photos, questions, ideas, etc.)
Work in pairs or triads	Reflecting and exchanging ideas, questions and thoughts among participants	You can use virtual breakout rooms and assign two or more people to each room for reflection for a discrete time (e.g. five or ten minutes)
Dialogue corners	Collecting ideas	Instead of pin boards in the corner of a room, one can provide several virtual whiteboards or documents that people can work on simultaneously
Parking lot	Collecting unsolved issues	Use an online whiteboard or document to collect issues that need to be reconsidered at a later point in time



AT THE END OF THE WORKSHOP

Remember the importance of a good ending. Point to the documentation, agreements and next steps, such as when and how participants can receive this information. End with a good **check-out** question, for example, 'Is there anything else that you want to say before we depart?' or 'Reflecting on our virtual collaboration today, what did you appreciate most?' (For further ideas, see the Questions for all seasons subsection). Depending on the situation, you might leave the virtual room open to encourage informal conversations after the meeting ends.

6. CHECK-OUT

We have written this toolkit to provide you with an introduction to the art of online hosting. We hope that after reading this document, you will be able to facilitate more meaningful, effective and fun workshops. At the same time, we know from experience that the principles of the art of online hosting seem simple, yet it is very difficult to explain what wise facilitation and meaningful dialogue feels like. Therefore, we encourage you to try out new things and practice, practice, practice. This is the only way to truly learn about the power of skilful facilitation and stimulating dialogue. So, it is your turn again:

What do you take home? After reading the toolkit, what resonates with you? What things do you want to apply in practice? What resources are you tapping into, to host yourself and others online?

In the following section, we gathered successful and inspiring examples from the past to showcase how uptake processes and knowledge exchange can be facilitated. These stories from practice demonstrate how there is not one way to generate uptake but, to a greater degree, it is a dynamic journey which can be taken on various pathways.





7. EXAMPLES FROM PRACTICE

VIRTUAL WRITE SHOP FOR MARINE SPATIAL PLANNING SOLUTIONS

THE CASE: The Blue Solutions Initiative is engaged in many marine spatial processes. To foster **peer-to-peer** learning, we needed to find examples on how marine spatial planning (MSP) is conducted and what the **key** elements of a successful process are.

THE PROCESS: Three online seminars for marine spatial planning practitioners were held by the Blue Solutions Initiative. These meetings provided background information on PANORAMA and instruction on the Solution-ing Approach. Putting the solutions to paper was done individually, guided by the Blue Solutions team. Peer feedback and group discussion helped to improve the understanding of each new solution.

The details on how the different sessions were structured can be found in **Annex 1**.

THE OUTCOME: In the end, five MSP-focused solutions were submitted to the PANORAMA platform shortly after the online seminar. We can use these as examples in our training courses and inspire learning from other MSP processes.

BLUE SOLUTIONS REGIONAL FORUM ON SOLUTIONS FOR OCEANS, COASTS AND HUMAN WELLBEING IN AFRICA

THE CASE: In 2016, the 4-day 'Regional Forum on Solutions for Oceans, Coasts and Human Wellbeing in Africa', held from 31 May to 3 June on Zanzibar, gathered more than 100 participants from 24 African countries to share successful examples of sustainable management and conservation of marine and coastal ecosystems. The forum, conducted in both English and French, was organized by the Blue Solutions Initiative and co-hosted by the Abidjan Convention, the Nairobi Convention, the Western Indian Ocean Marine Science Association (WIOMSA) and the Sustainable Ocean Initiative (SOI) of the Secretariat of the Convention on Biological Diversity (CBD).

THE PROCESS: In a large and open conference room with breath taking views of the Indian Ocean, delegates from African governments, civil society, the business sector and academia spent three days sharing and learning about a wealth of inspiring activities happening in the marine and costal realm all over the African continent.

Posters were presented for a diverse set of 28 'blue solutions' from 12 countries – successful approaches or processes implemented to achieve healthy and productive marine and coastal ecosystems. The Forum offered a very good mix between inputs and practical work.

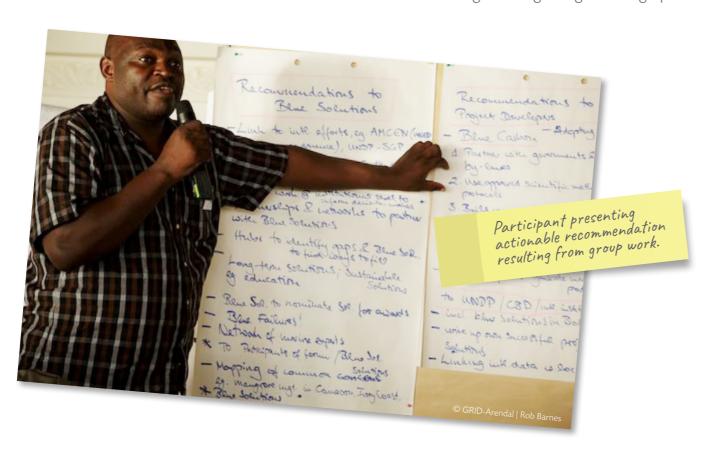




Actionable recommendations were presented in order to accelerate action towards the sustainable management and conservation of marine and coastal biodiversity in Africa and beyond. Examples included clustering solutions to facilitate the matching between solution providers and potential solution seekers, identifying blue solutions ambassadors, and encouraging funders to prioritise support of the upscaling and replication of proven solutions.

THE OUTCOME: The forum stood out for its high-quality interventions, inspiring discussions, interactive exercises and opportunities for networking. A wealth of innovative ideas to facilitate the sharing and the making of blue solutions at all scales was put forward by participants.

The forum inspired partners in the Ivory Coast and Madagascar to further their conservation goals, utilising the new knowledge and networks arising from solutions presented by fellow participants. Read about their experiences in knowledge sharing and generating uptake here:



Learning exchanges on local fisheries management

Building on the experiences made during the regional forum, the ocean conservation organisation Blue Ventures invited new partners from Zanzibar, Mozambique, Mayotte, Kenya and India to Madagascar to participate in a learning exchange three months later. During the 10-day programme, participants learned about periodic fisheries closures for fast growing invertebrate species. They saw for themselves how the use of short-term closures and locally managed marine areas (LMMAs) produced results, and could use these experiences to spark similar closures and LMMA movements back in their home countries.

The exchange and successes observed in Madagascar inspired the marine association marinecultures.org to start supporting octopus management back in Zanzibar. The project drew from the learnings of Blue Ventures and, partnering with Mwambao, an organization they met during the Regional Blue Solutions Forum, they set out to work with local fisherfolk in a new way of sustainable octopus management.



Towards the creation of the first Marine Protected Area (MPA) in Ivory Coast

The blue solution 'Conservation of marine turtles and improved human well-being' from Ivory Coast was one of the 28 projects presented in Zanzibar. At the forum, José Gómez Peñate, marine turtle conservation project manager at the NGO 'Conservation of Marine Species' (CEM) had the unique opportunity to discover some thirty blue solutions implemented in Africa and to meet the people behind them. 'During the various discussions and presentations, I realized that there can be other forms of protected areas than a national park and that there was a real will to create MPAs.' – a step towards for achieving his ambitious project of creating the first MPA in Ivory Coast.

The numerous exchanges and contacts that José Gómez Peñate was able to make at the Blue Solutions Forum proved to be key in bringing his blue solution to the next phase. His solution was noticed by a representative from the United Nations Environment Programme (UNEP). José also met with representatives from the Ivorian Office of Parks and Reserves, a valuable partner at the national level.

The forum also yielded results in putting José in contact with the NGO Rainforest Trust, with whom he was able to negotiate an agreement to finance this activity. Some of the financial barriers that used to oppose the project were thus overcome.

This outcome from the Blue Solutions Forum in Africa shows the forum's contribution to increased cooperation between actors of sustainable management and conservation of the marine and coastal biodiversity in Africa, fostering new alliances and inspiring action.





SOUTH AFRICA TO UGANDA: ABALOBI

THE CASE: In 2018, Blue Solutions and the Responsible Fisheries Business Chain Project (RFBCP) organized an exchange workshop to introduce ICT for fisheries solutions in the Nile perch fishery at Lake Victoria. The technology in focus was ABALOBI, an app suite for small-scale fishers' business management. Designed by Serge Raemakers and Andrew Cahood for the Cape Region of South Africa, ABALOBI enables reliable catch data collection, sound monitoring, transparency and traceability for small-scale fisheries-related data, and empowers small-scale fishers to take an active part in fisheries governance, management and marketplace.

THE PROCESS: The two-day exchange workshop on the shores of Lake Victoria was kicked off by various field visits around Kampala and Jinja, where Nile perch is loaded off and prepared for further processing. Fishermen, processors, traders and fish traders were introduced to ABALOBI whilst app developers learned how the local fishery and Nile perch value chain operates.

In total, 40 participants representing fishermen, boat owners, traders, processors, fisheries scientists and managers were introduced to the benefits of the app and took part in a productive, interactive session which enabled critical discussions and positive feedback.

THE OUTCOME: It was decided that the participants will feed the results of the workshop back to their fisher associations or institutions. Participants showed **high** willingness to proceed with pilots of ABALOBI and were convinced of the usefulness and advantages of the app suite to local stakeholders.

The momentum created during the workshops allowed solutions to be elevated to international recognition. It gathered important stakeholders who organized follow up events to work together on scaling up solutions.





UPSCALING PANORAMA'S SOLUTION-ING APPROACH

THE CASE: Conservationist and solution provider Mirjam de Koning used the building block approach to introduce a management unit and co-management structures, including multiple groups of stakeholders, in the Hin Nam No National Protected Area in Laos. The aim was to increase human capacities, management skills, information flows, monitoring processes and law enforcement, resulting in overall improved management of the protected area.

THE PROCESS: The implementation of an effective comanagement system in the protected area was enabled by six building blocks. Working with locally based organizations, utilising the knowledge of local people and generating participatory developments were key factors in the success of the solution. The involvement of local organization Agriculture and Forestry Consultants (AFC) enabled an upscaling process that was centred around ownership and shared governance.

THE OUTCOME: Through increased local skills and added local knowledge, the total effectiveness score of the protected area increased by 13 % in two years.

According to the solution provider, the Solution-ing Approach was a significant factor enabling the upscaling of the model. Using the building blocks reasoning, the solution was upscaled for communities to participate in protected area management developed by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) between 2013 – 2016. The local organization AFC supported three civil society organizations in implementing the model elsewhere, including through co-management training modules, national-level awareness raising, exchange visits, local capacity building and policy advocacy.

Governance Assessment on village level





8. SOURCES & FURTHER READING

Baldwin, Christina & Ann Linnea (2010): The Circle Way: A Leader in Every Chair.

Bohm, David (2004): On Dialogue

Brown, Juanita & David Isaacs (2005): The World Café: Shaping Our Futures Through Conversations That Matter.

Buckenmayer, Jan, Andrea Rawanschad & Holger Scholz (2020): Lotsenpaper Online Hosting.

Fenton, Amanda (2020): Tips: Designing Online Circles. (Blog post)

Lenzo, Amy & FireHawk Hulin (2017): Hosting in the Digital Realm. (unpublished workshop material)

Lenzo, Amy (2020): We Dialogue Website.

Peck, Scott M. (2010). The Different Drum: Community Making and Peace.

Scharmer, C. Otto (2016): Theory U. Leading from the Future as it Emerges. 2nd Edition.

Schein, Edgar H. (2016): Humble Inquiry: The Gentle Art of Asking.

Scholz, Holger & Roswitha Vesper (2017): Learning Map No. 11 Facilitation.

Vogt, Eric E., Juanita Brown & David Isaacs (2003): The Art of Powerful Questions: Catalyzing Insight, Innovation, and Action.

Weisbord, Marvin & Sandra Janoff (2007): Don't just Do Something, Stand There! Ten Principles for Leading Meetings That Matter.

Weisbord, Marvin & Sandra Janoff (2010): Future Search: Getting the Whole System in the Room for Vision, Commitment, and Action. Further Online Resources:

- → Check-in Generator
- → Icebreaker
- → Tscheck
- → Online Meeting Resources Toolkit for Facilitators
- → Question Archive
- → 3 Keys to Creating Connection at Virtual Events by Splash
- ightarrow The Circle Way website full of resources



ANNEX 1: EXEMPLARY SCRIPT: WRITE SHOP – SOLUTION SOURCING FOR INTEGRATED MARINE SPATIAL PLANNING

Objective	Activating the MSP community within the marine and coastal portal and getting participants to commit to develop new/own solutions for the specific topic (MSP) at PANORAMA
Result	+ Participants have basic knowledge about the PANORAMA partnership initiative
	+ Participants are familiar with the Solution-ing Approach and the platform functionalities
	+ 5 new solutions ready to submit to PANORAMA Marine and Coastal TC focusing on MSP
Participants	Bali Participants, define others (see list)
Place	Virtual, MS TEAMS call
Date and Time	1st: 28.09.2020, 3 – 4:30 pm CET // 2nd: 12.10.2020, 3:00 – 5:00 pm CET // 3rd: 29.10.2020, 3 -4:30 pm
Facilitation	KM, ER, TS, MC // one person facilitation plus one person support (time, tech, presentations, chat questions)

Exemplary schedule on the next page.



Session 1 (90 min) – Introducing the Solution-ing Approach

TIME	SEQUENCE	CONTENT/METHODS	DURA-	WHO	MATERIAL /NOTES!
			TION		
– 15 min	Open the room	greet people, make sure tech works, data re: recording		KM	
3:00	Check-In	Housekeeping: Data protection: we are going to record this session, please give a thumbs up in the chat if you are ok or speak up now. Mic and Video: Mute yourself while not speaking, put the video if your connection allows, at least when you speak, use hand sign, use the chat for question (we are going to try answering them all in the event, if not we come back to the question)		KM	
		 Official welcome and introduction to the workshop (why are we here, what to expect) Presentation of facilitators team: Katrin: moderation, guide through the session Mario: chat-master, answering questions, bringing in relevant one into the discussion. Thilanka: presentation input, technical support 	5	JKB KM	
		 + Presentation Participants / activate them + Please put in the chat: Name / Location / One sentence on 'Why am I here' / The answer to 'Have you been involved in practical MSP processes' – type yes or no 	15	TS	+ Post in the chat (chatmaster):
3:25	Input PANORAMA	+ Introduction to PANORAMA initiative and Blue Solutions as host of TC Marine & Coastal + Start with the philosophy (why, what works, what do we believe in (learn from practice, share knowledge), then who,Ending with platform (hand over to KM)	10	KM	Prezi
		 + Visiting the platform – how does it work? (visiting the website, showing features) + Start site – explore-TC-marine and coastal – filter + Second way: TC- search with key words 	10	KM	+ Interaction with people, let questions been asked
	Break	 Exercise to refresh Guide: take a piece of paper (notebook or similar) a marker and draw the picture 	5	KM	+ Eye-exercise (paper, marker, draw thenpractice and keep it)
3:50	Solution-ing Approach	+ Solution-ing Approach VIDEO	5	KM	Link: https://vimeo.com/186316317



Session 1

TIME	SEQUENCE	CONTENT/METHODS	DURA-	WHO	MATERIAL /NOTES!
			TION		
3:55		+ Understand what a solution is: Criteria and main ingredients: / Focus on Impact (what has changed by implementing your case?) / then BB (distil success factors) / examples from the platform (MSP Solutions!) live	15	KM (Intro/ppt) JKB examples KM Q&A	 + Make sure Questions are addressed + Examples: Belize: start a process, gather data, etc. Australia: set of clever zoning for a huge area
4:10	Closure	 Feedback round via mentimeter Questions: What do you take home from this session? Choose from the scale how much you agree with the statement I understand what a Solution is. The seminar was very helpful to structure my case. I want to write my case as a solution. I am participating in the second session. Do you have identified a solution from your work? Yes, and I will write it up. Yes, but not sure how to move on. Not sure, if my case complies with the solution criteria Nope, no idea. What was missing in this session? 	10	KM	mentimeter links to post in chat https://www.menti.com/ ibhzt3f2eq Feedback I https://www.menti.com/ jcp6edgi3y Feedback II
		 + Outlook /Next Steps: + Mention again criteria for solutions, and where to find them / make sure that participants have solutions to develop! + What to expect next session? After this session of information, the next one is to write down the solution. + Next Session to write up the solutions is on October 12, 3–4:30 pm + We will send the invite with meeting-link to this group. + Mention BPiP training course as another of the core Blue Solutions activities. + Goodbye words and we leave you with the video: Video 'MSP in a Nutshell' 	10	JKB	+ Next session: October 12, 3–4:30 pm
4:30	End				



Session 2 (120 min) – Start writing down your MSP solution!

TIME	SEQUENCE	CONTENT/METHODS	DURATION	WHO	MATERIAL / NOTES!
– 15 min	Open the room	greet people, make sure tech works		KM	Background music!
3:00	Check-In	Official welcome and introduction to workshop (what to expect) + Presentation of organizers team + Handover to facilitator + Check-In with all participants	5	JKB	
		 + Have people speak, video on! We are going to follow the participants list (see icon next to chat symbol) Please say your + Name, 	15	KM	Note about confirmed participation: 17 confirmed, 2 maybe
		+ Location, + one word that comes to your mind thinking about MSP + and: do you bring a solution idea today? (yes or no!)			Send Solutions template via email to SP (Erick)
	Introduction	Recap last session (depending on how many new persons are in the room adapt content)	5	TS	presentation slide, short form of what was sent
3:30	Making knowledge available	Introduction to the group work + Objective of this exercise: Each SP has a clear understanding of what his/ her solution is, how to structure it and what the next steps are. + We want to facilitate the start of the writing process, organize and orientate with the help of Blue Solutions Team and peers. + Roles + SP (shares the solution idea and writes what would go into the database), + participants (help the SP to structure in a way an external person understand well what is important to this specific solution, sounding board), + facilitators (orientate in terms of criteria and Solution-ing Approach, help structure, time keeping of this session and assuring getting to the objective) Grouping: put persons in the groups, announce the 5 links to get into the group calls. + Template (explain with example, not MSP!) + Title + Challenge + Impact + Building Blocks (optional) + Questions?	15	KM	Group chart / Erick shares and fills in Prepare groups calls (5 links) / Thilanka Intro explanation slide



Session 2

TIME	SEQUENCE	CONTENT/METHODS	DURATION	WHO	MATERIAL /NOTES!
3:45	Solution writing – 1st step	 + Write key elements of the solution down + We provide the template (send by email to the ones who said in the beginning they have a solution to share. 	10 –15	KM	Music in the background,
		+ This work is individually, SP write down the idea for Solution in the given format in bullet points, individually 10-15', if ready go to the group assigned to you!			Have the group chart visible / share screen in main call
4:00	Group work	Presentation 1st Solution of each group.	20	All	Each group
		SP presents solution to the group (mention briefly the context, then the template) (5') Discussion about Solution (questions, hints, sounding) (15')			
4:20		Presentation 2nd Solution of each group. SP presents solution to the group (mention briefly the context, then the template) (5') Discussion about Solution (questions, hints, sounding) (15')	20	All	
4:40		Introduction to registration at PANORAMA website Everyone creates an own account – Questions?	10	TS	
4:50	Closure	Homework: Try to fit from ppt (above) in the online template.	3	ER	Prepare link to send
		Consultation hour: 20 Oct, 3-4 pm (CET)			
		Outlook: next session setting (celebration!), 29 October 2020, 3:00- 4:30 pm (CET)	7	JKB	
		Goodbye			
5:00	End		•		



ANNEX 2: FACILITATION SCRIPT TEMPLATE

Workshop title	
Purpose & objectives	
Participants	
Location	
Time	
Organizers	
Hosting Team	



DAY1						
TIME	MIN	SESSION & OBJECTIVE	DETAIL	wно	TECH & METHOD	TEXT FOR CHAT & CO
8.45		Tech-check + Save time & hassle later on + Create personal, informal atmosphere by connecting early	Fs available in meeting call for tech-check + Informal chatting, ask about weather or Covid situation	+	+ Start video-call in GENERAL channel + Test & obtain feed- back from others on sound, light, presenting	+ Have you tried out the new MS Teams features (together view etc.)?
9:00			+	+	+	+
			+	+	+	+
10.30	30	Coffee break				
11.00			+	+	+	+
			+	+	+	+
12.30	90	Lunchbreak				
14.00			+	+	+	+
			+	+	+	+
15.30	30	Coffee break				
16.00			+	+	+	+
			+	+	+	+
17:30		End of the day	+	+	+	+

