FACILITATING CROSS-SECTOR ENGAGEMENTS

A Toolkit for Engaging Cross-sector Experts to Inform Integrated Action Planning

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A.   What are Cross-sector Engagements and Why Do Them?

Cross-sector engagements offer opportunities to directly solicit input from diverse experts and perspectives through active dialogue. These engagements can range from large group, multi-day workshops to one-on-one consultations. They are intended to take place as part of, and even throughout, one's planning process of choice.

Our focus in this toolkit is on tactics for **facilitating dialogue amongst participants from different sectoral perspectives – with a particular emphasis on the health, development, and environment sectors**[1] through our work on the Bridge Collaborative. We highlight resources that are particularly useful for cross-sector engagements, while also including elements that are part of general steps for effective meeting facilitation.

This toolkit focuses particularly on tactics for a **workshop** or similar group convening format for inviting input from diverse stakeholders into your project topic, though many of the principles can be applied to other formats. Furthermore, we focus particularly on in-person engagements, and recognize that many of the approaches and suggestions can be adapted for virtual formats.

Why engage people from other sectors?

- You are dealing with a complex, systemic problem that can only be fully viewed from diverse representation across the system.
- Your team seeks to understand how a problem and/or solution affects or is affected by factors and stakeholders from other sectors.
- Your team has one or more problems, questions, or topics to pose to a group for input (ideally set within a specific geography).
- Your team is at a project stage where you are open and able to act on insights generated from diverse perspectives.

What is a cross-sector engagement?

> **A cross-sector engagement provides a structured process to understand and explore relationships and/or solutions within a complex system, as opposed to answering a narrow, sector-focused technical question.**

For example, a cross-sector framing question could be: how might we work with health, development, and environmental actors to reduce transmission of zoonotic diseases in Madagascar?

The value of a cross-sector engagement is in having a structured process for eliciting and integrating knowledge across participants to develop a deeper, more actionable understanding of how to drive progress on the focal question.

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[1] For this document, we use the term sector to refer to the broad set of actors involved in major domains of advancement and practice for health, development and environment. We understand there are other uses of this term, including to differentiate between private entities (corporations) and public entities (governments). We define these sectors broadly, such that the *development sector* encompasses all actors (e.g. multilateral development banks, foundations, bilateral development agencies, non-profits, private development firms, etc.) working on any aspect of human development (e.g. education, gender equity, agriculture, housing, security, economic development, infrastructure, sanitation, etc.). The *health sector* encompasses all actors (e.g. research institutes and universities; insurance, pharmaceutical and other companies; public health workers and organizations; funders; etc.) working on any aspect of health. The *environment sector* encompasses all actors (e.g. non-profit organizations, research institutes and universities, funders, law firms, regulators, natural resource management firms, etc.) working on any aspect of the environment (conservation, pollution, sustainability, etc.) (Source: Bridge Collaborative Practitioner's Guide).

Cross-sector engagements can be integrated into an organization's regular planning process, or pursued as a new effort where appropriate, to undertake the following:

- Convene participants from different backgrounds or fields of expertise (i.e. across health, development, and/or environment).
- Actively engage participants around a social and/or environmental problem or goal.
- Form a holistic understanding of the roles and relationships across fields of expertise, so as to inform future research or implementation actions.
- Combine these diverse perspectives in real time, communicating knowledge and ideas across different ways of knowing and from diverse angles.

CASE EXAMPLE: Human Health & Strategic Land Retirement in the San Joaquin Valley

At The Nature Conservancy (TNC), there are many conservation practitioners who recognize important relationships between the biodiversity outcomes they are working towards and human wellbeing outcomes. However, because the conservation, human health, and development communities are conventionally siloed, understanding and acting on the science behind these connections can feel like uncharted territory. Who do you call? Where do you find the right data?

Rodd Kelsey, Lead Scientist for TNC's California Chapter, courageously raised his hand to ask these questions. To combat groundwater depletion, the State of California passed the Sustainable Groundwater Management Act (SGMA) in 2014, which requires groundwater-dependent regions to restrict the amount of water they extract to match the amount being recharged. As a result, agricultural land retirement is on the rise in the San Joaquin Valley.

A team from TNC's California chapter is working to inform a strategic approach to this land retirement and restoration so that it can help bring back key habitat for threatened species. Rodd knew there were linkages in the region between agricultural activity and health problems related to air pollution and water contamination, and he wanted to better understand exactly how and where retiring agricultural land and restoring it to natural habitats for endangered species could lead to the greatest human health benefits. "It is common knowledge that there is a link between agricultural activity and health problems, but I've done very little research on it," he admitted. The Bridge Collaborative partnered with this team to find and engage outside experts on the health effects of air pollution and water contamination who could help answer these questions. In this case we engaged academics who had published on these topics, as well as representatives from local government and civil society institutions that focused on these issues.

Results:

The half-day workshop clarified the strongest linkages between agricultural activity and health, which enabled the team to narrow in on further research following the workshop. "I was really struck by how easily the people in the room commanded the information," said Abby Hart, the agricultural project director for TNC's California chapter. "There were a lot of points that were apparently very well understood in their respective fields, yet these points were not at all clear to me beforehand from my conservation experience. It would have taken me a very long time to get all this information on my own."

The team is now in the process of writing a policy paper in collaboration with the participants, who have continued to add tremendous value in guiding collective understanding of the health aspects of this work.

Furthermore, this experience influenced the way the team approaches other projects. "It's already made me think about the human health aspect of other projects we're involved in, and it's also going to prove valuable for fundraising. These data present us with the opportunity to reach out to a new group of donors more interested in human health, and we're already doing that," said Rodd.

See the Appendix for an outline of how this engagement was structured and facilitated.

Abigail Hart and Rodd Kelsey. Photo: Christine Jacobs

B. How to Plan and Prepare for your Cross-Sector Workshop:
Setting up the inputs and invitees to make for a productive workshop

This section covers the following steps: (1) identifying team roles, (2) setting objectives, (3) who to invite, (4) where to host, (5) when to host, (6) what to prepare, and (7) what to share with participants in advance.

i) Identifying team roles

There are many different types of tasks that are required to plan and execute a good workshop - project management, logistics, technical research, meeting design and facilitation. Guided by the capacity available to you, it is important upfront to establish clear roles and responsibilities across all necessary tasks.

A skilled facilitator is key to a workshop's success (and enjoyment). While you can hire a professional external facilitator, you can also draw on one or more people on your team who feel comfortable facilitating, and are willing and interested to learn and apply the tactics outlined in this document. Ideally, the lead facilitator will have at least one other person to support them with designing the agenda, and facilitating and keeping time on the day of – just be clear who is the 'lead' and has final decision-making power on the agenda.

ii) Setting objectives

An early step in most planning processes is to define a project's objectives and/or target **outcomes**, which the cross-sector engagements we describe here should be directly informed by and contribute to. Based on your project objectives and target outcomes, as well as any known intermediate outcomes of your **intervention** (if you already have one identified), you will want to first determine:

    (i)   what cross-sector action or information you need, and

    (ii)   how you anticipate that engaging relevant actors and experts may help address those needs.

Note, you may need to do more work defining the most relevant sectors before defining your objectives; see Section B.II for guidance on that process.

Your workshop objectives will determine your agenda, who to invite, and how long to convene. Depending on the stage of your project, objectives may include one or more of the following:

UNDERSTAND THE WHOLE SYSTEM related to drivers and outcomes that affect and are affected by your topic:

- Develop a **holistic understanding of a topic's surrounding context or system**, and the relationship between all potentially relevant cross-sector factors, helping all stakeholders involved understand how their actions affect their own interests and those of others in a system.

- Create a vision of the desired future across sectors, and **identify the key levers** for achieving this future.

- Identify how your team's intervention can best contribute to a multi-sector theory of change and develop or refine a **robust theory of change for your intervention** by including diverse types of expertise.

- Identify possible or observed negative **unintended consequences** of your intervention and steps to mitigate them, or **identify possible synergistic benefits** and think about how to maximize them.

UNDERSTAND SPECIFIC CONNECTIONS within the larger system related to cross-sector outcomes and your topic:

- Understand specific causal relationships that connect your topic at hand to outcomes in other sectors to **inform where an intervention might enhance cross-sector impact**.
- Identify which cross-sector relationships may be important but which have weak **evidence**, so as to **inform a research or monitoring program**.

GENERATE SOLUTIONS based on understanding of cross-sector relationships and priorities within your system:

- **Learn from other sectors** about which solutions have been tried, with what results, and under what conditions to inform your approach.
- Generate new ideas for **solutions that achieve multiple outcomes and minimize potential harms** across sectors.

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iii)   Who to invite

Getting the "right" people in the room is a key ingredient in setting up a workshop for success. This relates to having adequate representation across relevant knowledge areas and perspectives, as well as the ability of the participants to work together constructively to overcome barriers (e.g. language, terminology, competing interests) and to integrate their knowledge.

Types of Expertise

Identifying the right set of participants begins with inviting individuals who possess expertise and experience in one or more of the topics you have identified as being relevant to your meeting objectives. If you are unsure of the types of expertise you might need to accomplish the objectives of your workshop or larger planning process, we recommend using the Sector Adjacency Assessment as a starting point. Once you've completed this exercise, you will have clarified one or more high priority cross-sector connections that can directly inform who to invite. As you invite people, you can ask for their recommendations of which additional people, or perspectives, would be valuable to include.

Stakeholder Types

After clarifying which types of expertise are needed, it can be valuable to consider the various perspectives represented across different types of institutions, while also considering an individual's range of personal and professional experiences (which may span multiple geographies or institutional types). Your workshop objectives will inform the types of stakeholders who will be most appropriate to include. For any of the below workshop objectives types, we recommend including a diversity of perspectives across institutional types (e.g. academia, civil society, government, private sector), as well as representation from your target community and other geographies as relevant. Overleaf is a general suggestion for considerations of how the composition of stakeholders may vary depending on your workshop's objective (though who is needed will vary by topic):

Objective Type	Stakeholder Considerations
Understand the Whole System	The more diverse types of expertise and institutions represented, the more holistic a view you will have of your focal system. We recommend including participants from known relevant topic areas, as well as some participants from topic areas that are more exploratory, which may surface unexpected connections and insights.
Clarify Specific Connection	Narrowing your topic focus from the whole system to a subset of priority relationships also means a narrower slice of stakeholders who will be able to speak knowledgeably about a specific topic. We recommend primarily including experts (across institution types and including the focal community) whose specialty is directly related to the connection you seek to understand.
Generate Solutions	Similar to the 'Understand the Whole System' objective – a greater diversity of perspectives generally yields more creative and holistic solutions. For this type of objective, you may even want to include participants who do not have a deep relationship to or knowledge of your system, as "unusual suspects" can often provide unique new perspectives. Additionally, it is especially important to co-create solutions with stakeholders and end users whose buy-in will be critical for success.

EXAMPLE: Ugandan Oil Boom's Cross-sector Impacts

Oil exploration and development has newly begun in the Albertine region of western Uganda, and the mass migration of people seeking (mostly temporary) jobs in this region, with little infrastructure and fragile forest habitat, has potentially profound implications across education, food security, gender equity, forest and wildlife conservation, livelihoods, conflict, and beyond. The Wildlife Conservation (WCS) Society and the United States Agency for International Development/Uganda set out to initiate an integrated approach to respond to these anticipated changes. They did so by convening a workshop that would both identify the most relevant cross-sector priorities and generate buy-in for future collaboration across government ministries.

With support from the Bridge Collaborative, they hosted a two-and-a-half day workshop in Uganda's Albertine region, with over 50 participants that consisted of primarily local and national government representatives from multiple ministries, as well as representatives from the oil industry and select civil society organizations in the health, development and environment communities.

This workshop served as a first step in exploring the issue, and more information on the outcomes can be found here. With ensuing follow-up, the workshop has resulted in a new initiative being chaired by Uganda's Prime Minister.
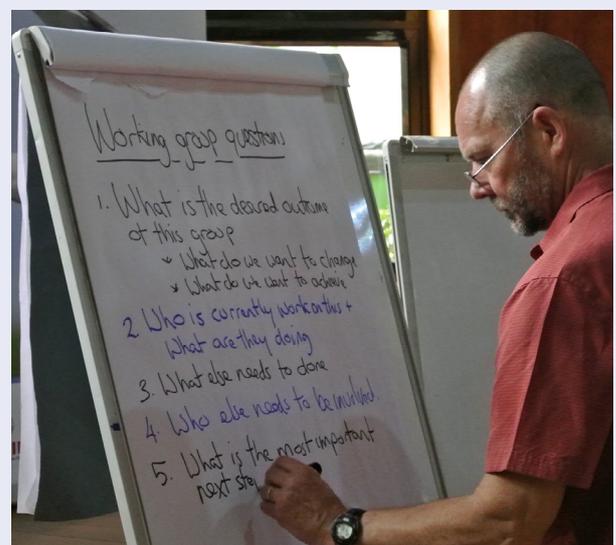
WCS's David Wilkie writing questions for breakout groups
Photo Credit: Christine Jacobs

iv) Where to host

Resources, travel time, and other feasibility considerations are key to informing decisions about where to host a cross-sector workshop. This includes whether the workshop will be held in-person or virtually.

When possible, it's desirable to host your workshop in the field or region in which your project is focused. Including a site visit with participants and additional stakeholders can provide an incredibly rich opportunity for generating cross-sector insights and connections. Such visits allow participants to see the whole interconnected reality of a place, and they provide an opportunity to uncover important aspects about the social, economic, cultural, and ecological dynamics that might not otherwise be apparent. An added benefit of a site visit is the opportunity for participants to connect with one another in a less formal and more inquisitive way, which can also generate powerful insights about the system and how they all relate to it.

We recognize that it may not be feasible to convene in your focal region. If that is the case, we recommend incorporating elements of the focal geography or community, for example: showing a video or slideshow of the site, pre-recording and showing interviews with community members, inviting participants to share first-hand stories of their experiences in the field, or other creative ways to build connections to and understanding of the focal system. These elements can be integrated into in-person or virtual formats.

Box 1. Participant inclusion tips

Integrate virtual participants – In-person interaction can be uniquely valuable for enabling cross-pollination of knowledge and ideas, and it allows space for spontaneous interactions to occur. However, If important contributors cannot attend an in-person session, don't miss the opportunity to solicit their input virtually. Consider:

- Mixing virtual with in-person participation can work for a smaller workshop, and for a limited portion of the workshop (likely up to 3 hours, or spread across multiple short sessions).

- Ensure that you are able to share any materials with virtual participants in advance or in real time if they are developed during the meeting. Because virtual participants cannot readily interpret social cues, you will want to be mindful to balance their contribution with those of others in the room. One mechanism for this is to break into smaller groups, when appropriate (e.g. 3-4 people).

- Recording and playing a short video of virtual participants' responses to several targeted questions.

- Link in virtual participants for only a specific portion of the agenda, with structured questions or prompts.

- For a larger workshop, or one that involves considerable hands-on interaction (such as putting sticky notes up on a wall), virtual participation is especially challenging. Consider soliciting input from these people both before and after the workshop, or even during the workshop if there is an appropriate time (e.g. at night during a multi-day meeting), so that their inputs are added to the group dialogue, and virtual participants have a chance to review and react to others' contributions.

Leverage conference attendance – conferences and other organized gatherings may

provide valuable opportunities to gain access to a greater number of people within a particular field. You may have the opportunity to host an invite-only side-session, or you may host an open session during the conference. The latter works well for soliciting a broad array of input on focused questions that can be easily grasped and responded to by this audience without pre-reading.

v) When to host

Timeline

If you are at a project stage where you are open and able to act on insights generated from diverse cross-sector perspectives, we recommend scheduling a workshop for sooner than you might typically feel comfortable with. The insights obtained through the workshop are likely to shift the direction of the project, so we encourage you to challenge yourself to move as quickly as is practical.

Duration

The desired duration will depend on many factors, including your workshop's objectives, location, budget, and availability and interest of participants. Additionally, different cultures, sectors and communities will have different constraints or preferences that will inform what duration is appropriate or feasible. In general, the larger or more complex the objective and/or 2

- For a narrowly focused objective, such as better understanding the relationship between your project topic and a specific cross-sector outcome (e.g. agricultural activity and respiratory health), and/or a small participant pool, a half- to one-day session may be sufficient.

- For multiple and/or complex objectives, such as identifying negative unintended consequences of an intervention and generating new solutions to mitigate them, two or more days may be required. Additionally, having one or more evenings to socialize and/or relax in between sessions can help bring new ideas and insights the following day, and further builds trust and relationships among participants. As field visits are recommended when feasible, be sure to include time for this in addition to the workshop time.

vi) What to prepare

Do some research, but move quickly

In advance of the workshop, it is important to conduct some general background research on the cross-sector topics of interest. This research helps refine the focus of the workshop, and allows you to share key background information with participants in advance, enabling a more efficient use of meeting time.

At the same time, the purpose of the workshop is to learn from new experts, who will likely be able to speak readily to the latest research in their field and point you towards relevant sources. Therefore, attempting to do too much research on your own in advance could actually slow down your overall progress. Tailor your level of effort on background research to the needs and context of the workshop and refrain from doing more advanced research than is required to curate a productive conversation, recognizing that important insights will result from these conversations.

Visualize your understanding

Visual diagrams like **situation analyses** and **results chains** can be very constructive mechanisms for communicating your understanding of complex systems, and generating feedback. Depending on the stage of your project, a situation analysis, results chain, or other type of diagram may be most appropriate. From here on, we will refer to this kind of visualization as a **conceptual model**.

Develop a draft of your conceptual model in advance of the workshop to refine with your participants. In most cases, this version will represent your current understanding of the system, and therefore provide a means to integrate new sector dimensions that are not yet addressed but important to your project.

- Tip: There are several tools to help you create these conceptual model, such as Lucidchart, Kumu, Microsoft Visio, draw.io, or Miradi

What to share with participants in advance

Assigning pre-reading and 'homework' can help make time spent together even more effective. If you feel your attendees would be willing and able to do some preparation in advance, consider:

- Sharing background materials so that participants are familiar with the social, environmental, and political context of the project, and general information about key organizations.

- Asking questions through a survey (e.g. soliciting opinions regarding the priorities of certain issues, helpful resources from their sector, or any other questions that can be more efficiently addressed in advance).

When culturally appropriate, assigning 'homework' can jump-start thinking – such as having each participant develop a draft response to the main question(s) you will be working through during the session, or sharing a draft of your conceptual model and requesting preliminary feedback on the top 3 most important additions or modifications.

Even if pre-work is assigned, anticipate that some attendees won't be able to complete it in advance, and be prepared to accommodate their participation.

C.   How to Host a Cross-sector Workshop
Setting up the inputs and invitees to make for a productive workshop

This section covers the following steps: (1) Breaking the ice & getting acquainted, (2) Creating a common understanding, (3) Exploring cross-sector connections, (4) From ideas to action, and (5) Learning from experience.

There are many resources on general facilitation best-practices (see Box 2 below). This toolkit serves to complement those resources by focusing on aspects that are especially unique or important for convening a cross-sector audience and converging on actionable insights.

Box 2: Recommended facilitation reads:

- [Gather: the Art and Science of Effective Convening](), Monitor Institute

- [The Art of Gathering,]() Priya Parker

- [The Surprising Power of Liberating Structures]()(book and website), Henri Lipmanowicz, Keith McCandless

- [Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers,]() Dave Gray et al.

i) Breaking the ice & getting acquainted

It's always helpful to get people warmed up and in the right mindset to engage with one another. This is especially the case when convening people from diverse backgrounds, who often will not know one another.

At the beginning of workshops hosted by the Bridge Collaborative team, we introduce 'ice breakers' that are especially suited to cross-sector groups. In addition to introducing participants to one another, a key goal is to facilitate learning and sharing about the focal system and how participants' expertise relates to it. Below in Box 3 are select exercises that we have found work well in cross-sector contexts, with instructions for how to implement.

Box 3: Recommended Ice Breakers:

Visionary Introductions:

Good for - Quick introductions, setting an optimistic tone, and learning about your participants' priority issues

Materials needed - Half-sheet of paper or half legal-sized sticky note for each person, markers, surface for taping or sticking paper to (butcher paper, or a blank wall will do)

Group Size - 40 or less

Time - around 15 minutes

Instructions

1) Give each person a half-sheet of paper plus painters' tape or a half legal-sized sticky note, and one or more markers.

2) Ask everyone to write their _one-sentence_ answer to the question: "In 20 years, what do you want to be true for [focal place or system]?" (bonus, ask them to also draw their vision). Give them 3-5 minutes of quiet time to answer individually.

3) Invite each person to introduce themselves in 30 seconds by stating their name, organization, and answer to the prompt (i.e. vision for the future). Stick everyone's answers to the wall or board, grouping those that are similar together. It can be valuable to keep this up for the duration of the workshop to serve as a reminder.

Magic Box:

Good for - Fostering creativity and playfulness (around a serious topic), and beginning to uncover people's priorities

Materials needed - A box or bag, and a clever or random object that serves as a prize (see below)

Group Size - Groups of any size (if more than 15 people, consider putting people into pairs or small teams)

Time - around 15 minutes

Instructions

In advance

1) You will be asking participants to guess what is in a box (or bag) that magically contains the solution to a big problem you're trying to solve. Fill in the following prompt with your big goal: "There is something in this magic box that achieves [*your goal (e.g. access to education for all women and girls in Malawi*]. What's in the box?"

2) Acquire something that you will reveal to participants once they've given their "guess." This can be silly and nonsensical (like a rock or a box of jelly beans) or symbolic (like a plant or a book).

At the workshop

1) Pose the prompt you developed in step 1 above to your group.

2) Ask each person to share his/her name, organization, and answer to the question.

3) You determine a "winner" (can be who has the "best" answer, or answer that's closest to what is actually in the box).

Landscape Diagram:

Good for - Setting a common understanding of the elements of a physical (e.g. a specific geographic or ecological context) or conceptual (e.g. a supply chain or a community) landscape and each participant's role within it. This exercise includes a process that generates insights about both the study context and participants' focal areas, and it results in a visual artifact that can be left hanging for the duration of the workshop

Materials needed - Large surface for writing and drawing, such as butcher block paper taped to the wall, or a whiteboard and colored markers.

Group Size - Groups with representatives of up to 15 different institutions or departments.

Time - 20-45 minutes (depending on group size - suggest max 3 min per person, with 2 min for Q&A).

Instructions

In advance

1) As part of the setup for the workshop, create a basic visual diagram of your focal system upon which the participants will build and embellish - don't worry about making it a work of art or highly accurate.

At the workshop

1) Ask a representative from each institution (or each department if you have multiple participants from larger institutions), to describe his/her role within this landscape or system.

2) Have either the participant, or a designated recorder, visually represent their role on the map.

Mapping Our Priorities:

Good for - Understanding the common and different objectives of participants in the room.

Materials needed - Large surface for writing and drawing, such as butcher block paper taped to the wall (or two flipchart papers taped side-by-side), a whiteboard, and at least two different colored markers.

Group Size - up to 20 people

Time - 10 - 15 minutes

Instructions

1) Ask each participant to identify two to three priorities they aim to address through their work - priorities may be an impact area (e.g. protecting forests or reducing malnutrition), or a functional area (e.g. technology innovation, effective communications) to achieve a variety of types of impact.

2) Write the first person's name in one color, and write and circle each priority area (creating a "node"), with a line connecting to the person's name.

3) Write each successive person's name, connect to an existing node when a priority is repeated, and create a new node when new priorities are introduced.

EXAMPLE: Visionary Introductions - Indonesian Mangroves, Food Security and Gender

The Bridge Collaborative and The Nature Conservancy's Indonesia program partnered to host a workshop to explore how mangrove conservation may affect food security and nutrition in the Berau region of East Kalimantan. In this region, meetings tend to be formal in tone, and centered around a handful of expert presenters. For our workshop, we wanted to invite a high degree of participation from attendees, in order to learn from them and enable them to learn from one another.

To set the tone for this workshop, we drew a cartoonish landscape of the Berau coastline, and asked each person to identify one thing they wanted to see in Berau 10 years in the future. We asked them to draw this vision, and capture it in a single sentence. Then, each participant introduced themselves by way of their vision for Berau. Visions ranged from sea turtle preservation, to jobs for women, to star soccer teams. This exercise not only helped the participants get to know one another, but also served as a north star for our two days together. More information on this workshop can be found in this article.
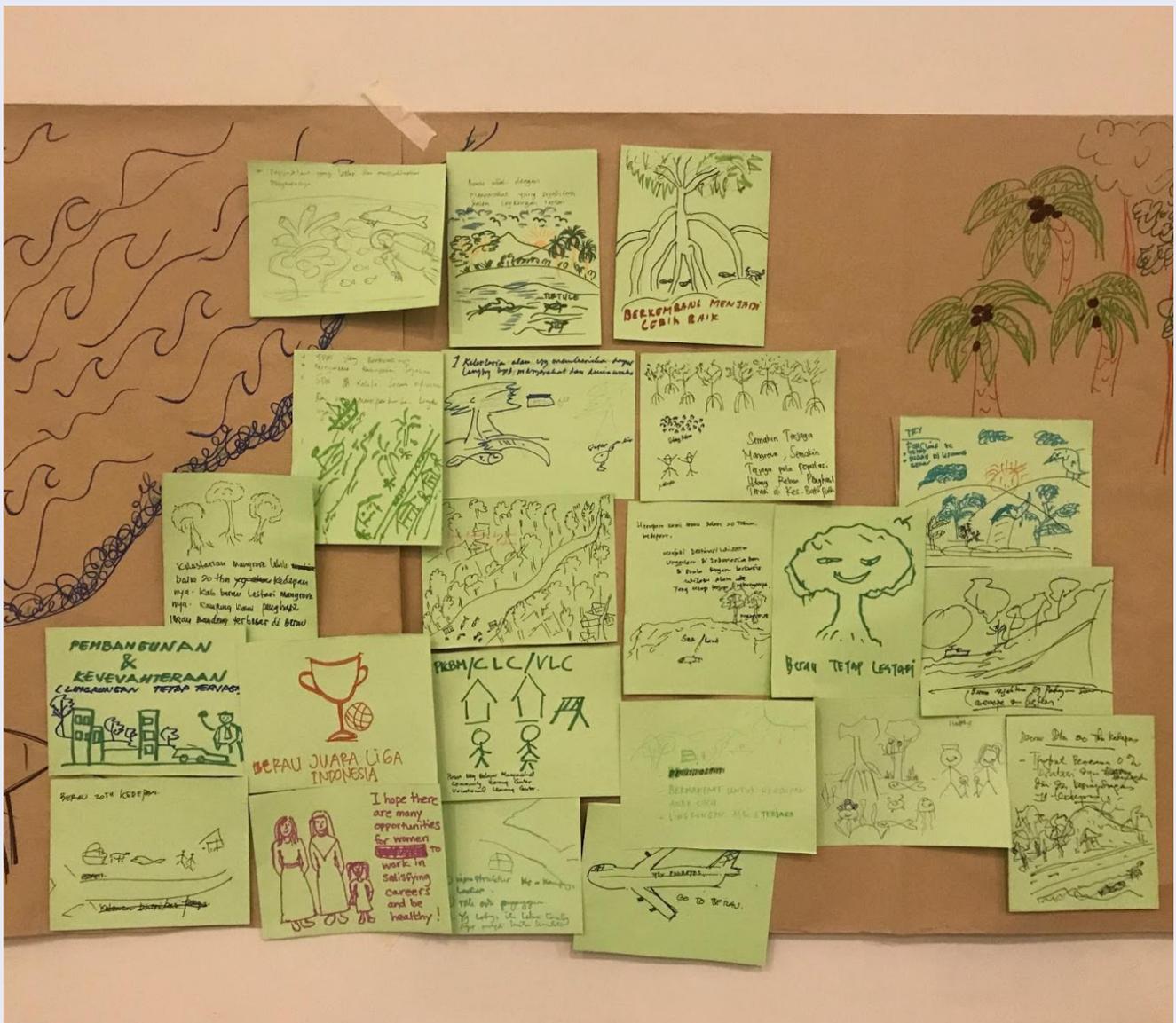
Participants' Collective Vision for Berau. Photo Credit: Christine Jacobs

ii) Creating a common understanding

Before digging deeply into your project topic with participants, it is important to first develop a shared agreement about how participants will interact with each other to achieve the workshop's objectives.

Creating Norms

Setting meeting participation norms, or "rules of engagement", is a general good practice for workshops. This can be especially valuable in a cross-sector group, where people may not know one another, and may not be instinctively inclined to participate as freely as you intend. A simple tactic for developing shared rules of engagement is to spend a few minutes at the beginning of the workshop to crowdsource norms from the group. It is helpful to write them in a place where they can be visible throughout the entire workshop and referred back to as needed.

To get the suggestions flowing, you may ask "what will make this meeting constructive?" or "which rules of engagement will ensure that we have a productive meeting?" You may want to lead by example to share a first rule that you feel is particularly important (e.g. "Be present," or "Share air-time"). It is also important to review the final list to ensure it encourages respect, active participation, and non-judgement.

Aligning Objectives

Participants from different institutions, sectors, and/or fields of expertise will generally have different reasons for their interest in your topic. Some might see your mission as directly aligned with their own, while others may be curious to find out whether or not there is alignment. In setting up the day, be sure to not only clearly articulate the objectives of the workshop very clearly (i.e. on a flipchart on the wall), but to also create space to hear about why the topic is of interest to your participants, and what they hope to achieve during your time together.

Whether as part of introductions, an ice breaker (such as the 'Mapping our Priorities' exercise), or its own slot in the agenda, invite participants to respond to some form of the question "What interests you about this topic?" or "How does this topic align with your work?" and "What would make this meeting a success for you?"

Establishing a Common Language

It is often the case that people from diverse sectors, organization types, and geographies use different terminology, which can create confusion and inhibit clear communication during a workshop. Establishing common terms and definitions around key concepts at the beginning help to avoid misunderstandings. Each topic and context will have its own unique set of terms that will need to be defined by the group. While it may not be possible to surface all potentially problematic terminology in advance, we recommend creating the space to do so at the outset by:

- Flagging any terms that you commonly use that may fall into either of the below categories, reviewing their definitions and keeping them written somewhere visible for the duration of the meeting:
  - **Technical terms** or acronyms that are specific to your field or sector. Even if they seem obvious to you, they likely are not to others.

- **Common generic terms** that may in fact have different definitions in different sectors – consider terms that relate to social or environmental conditions or characteristics, time scales, and intended or unintended effects (e.g. "impact," "outcome," "result," "intervention," "sustainability," "quality," "short-term," "long-term," etc.).
- Encouraging participants to be vocal if they hear a term they are unsure about and to add it to the definitions list started at the outset.

Note: you may also have participants with different levels of comfort in the meeting's primary language, which may require an interpreter, or simply additional time and space for people to be able to articulate themselves fully.

EXAMPLE: Refugee Response & Sustainable Resource Management

The Center for Global Development (CGD) and The Nature Conservancy (TNC) participated in a planning meeting to discuss ways to better integrate sustainable natural resource management practices into humanitarian responses for refugees. During initial meetings, CGD staff referred to the time horizon of realizing environmental benefits as "long term," whereas TNC staff countered that actually benefits could be achieved in the "short term." After some back and forth, they discovered that CGD's meaning of "short term" was weeks or months, whereas TNC's meaning was a few years. Going forward, the group decided to use actual time estimates and refrain from "short" or "long" term phrasing.

Framing the Context

It is important to ensure that all participants are equipped with basic background knowledge about the topic, geography, and project at hand. Consider these approaches depending on your participants:

- In case only a few participants are familiar with the workshop context, consider asking one or more participants or team members to provide a brief formal overview presentation at the beginning (in addition to any background materials provided beforehand).
- If most participants are generally familiar with the context, allowing for everyone to build together a common understanding of the context can provide a fruitful starting point. Consider forming small breakout groups to answer questions such as:
  - How would you summarize the recent trends and current state of [topic]?
  - What are the biggest challenges surrounding [topic]?
  - What are the greatest opportunities for action?
  - What would the best possible future look like?

Below are templates with more detailed questions and instructions:
- This 'Defining Challenges & Opportunities' worksheet, which is good for groups that will be defining challenges and/or opportunities for potential solutions.
- These Context-Setting Questions, (using aquaculture as an example) is good for groups that will be exploring specific cross-sector connections in depth.

iii) Exploring cross-sector connections

Once you have set the groundwork for the workshop, the group will be ready to dig into the heart of your engagement's purpose – to explore cross-sector relationships and interdependencies within your system that relate to advancing synergistic opportunities, mitigating negative unintended consequences, or navigating seeming paradoxes that need to be better framed.

This section contains exercises centered around the use of conceptual models to establish a common understanding of the relationships within the focal system and to facilitate intentional discovery related to the new expertise present at the workshop.

Introducing the Conceptual Model Structure

The type of conceptual model used should match the planning stage your team is working on and the insights you seek to generate. For teams seeking to gain a general understanding of their system, a situation analysis or similar tool may be appropriate (see here [page 29] for further details). For team's ready to analyze possible interventions or **hypotheses**, a results chains or similar tool may be appropriate (see here [page 11] for further details).

When introducing your conceptual model:

- DO: introduce the type, purpose, and basic principles or rules of the conceptual model being used, and ensure everyone has a common understanding of what symbols and terms mean.
- DON'T: belabor the nuances of these rules – what is most important is that everyone understands what symbols and terms mean and that they are able to communicate effectively with one another during the workshop.

Practicing the Conceptual Model

When a group is unfamiliar with this type of conceptual model, start with a warm-up exercise to develop a very simple example of the model around an easy-to-grasp, unrelated topic or problem.

For example: use "oversleeping" as a problem to develop a situation analysis around, or "access

to caffeine" as a personal "intervention" to develop a results chain. Having participants work together or share individual diagrams with each other can expose any misunderstandings in how to apply the model and serve as an additional 'ice breaker'.
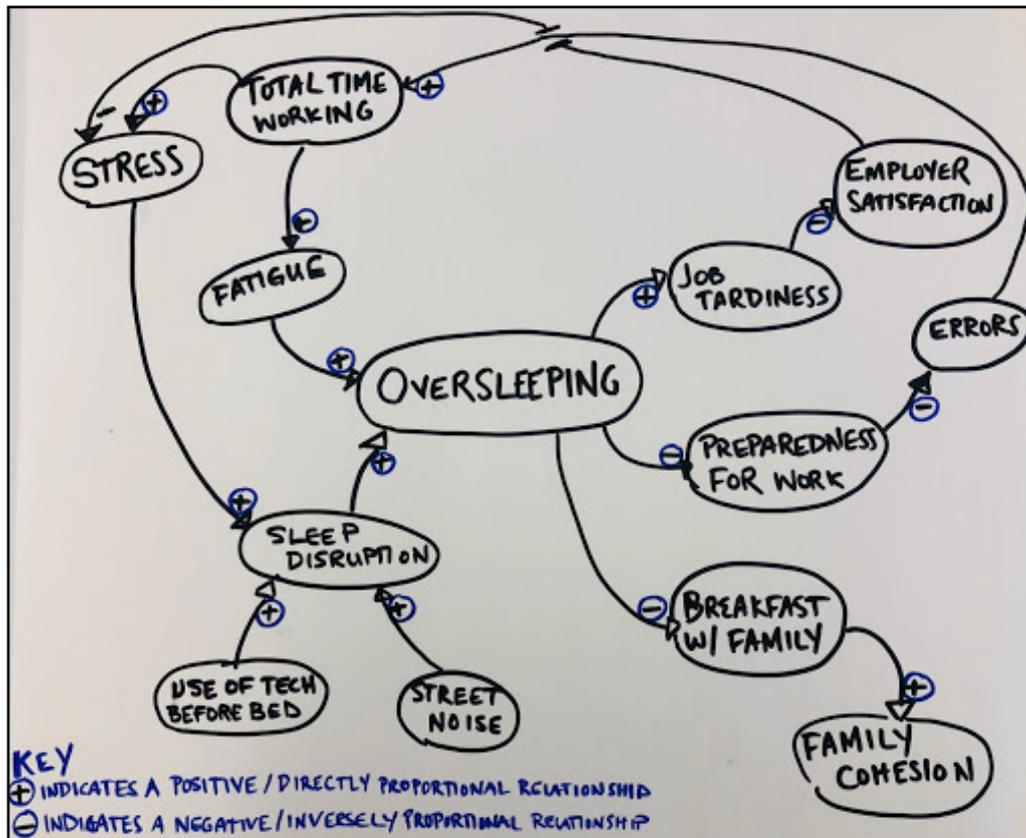
Example warm-up exercise developing a situation analysis on oversleeping

Building a Collective Model

This is the heart of your workshop, where you start to really draw out relevant expertise from your participants. There are many ways to facilitate this process, including several recommended options below. Key tenets of this process are **exploration and iteration** – invite participants to think broadly and creatively and to not worry about getting it perfect the first time.

For any of the options below, we recommend splitting into groups of no more than eight participants total, and starting by giving everyone 5-10 minutes of silent time to write their own answers and/or sketch their own model.

Build an entire conceptual model from scratch: Even if participants were asked to draft their own conceptual model in advance of the workshop (which is recommended), it can be useful to start from a blank slate with your group so as not to bias their input:

- Pick or request a volunteer to describe his/her diagram first and draw it on a large whiteboard or paper so it is visible to the entire group.
- Next, either section by section or person by person, solicit additions or changes to this starting outline.

Build onto a draft model: Starting with a draft model can be a good idea to speed up the process, or if you are describing an intervention or a larger system that participants are not very familiar with.

- Work through the model branch by branch, or section by section, soliciting input on any links of the chain that are missing.
- It may be helpful to explicitly call out specific dimensions (e.g. gender, nutrition, education) to ensure that relevant issues are integrated into the diagram.

Build different sections in parallel: Your model will inevitably have multiple branches, clusters, or sections. Instead of having each group cover the same territory in parallel, you can assign different sections of the model to different groups:

- Pick or request a volunteer to describe his/her model first and draw it on a large whiteboard or paper.
- Next, either element by element or person by person, solicit additions to this starting outline.
- Make sure to add in connections between different "branches" of the chain that were developed by the different groups.

EXAMPLE: Human Health & Strategic Land Retirement in the San Joaquin Valley (continued from Section A.II)

In the TNC California case illustrated earlier, we divided the conceptual model into two sub-sections: (i) air pollution and (ii) groundwater pollution. We then split participants into those groups based on their field of expertise. In the breakout groups, we made revisions to the sub-section, and identified the strength of each relationship or causal pathway. We then each shared our section with the rest of the group for input.

For each option above, below are examples of questions that can be applied to specific elements or factors within the model that might help unlock new perspectives:

- Why does this occur / exist? (Continue to ask 'why?' to uncover root causes in a situation analysis, or expose assumptions in a results chain.)
- How might this affect the local community?
- How might men and women be affected differently?
- What else might this node affect, or be affected by?
- Are there any potential negative consequences of this? Who would be harmed?
- Are there any potential positive consequences of this? (especially good question for seemingly negative outcomes) Who would benefit?

For a more detailed list of questions – please refer to this Cross-Cutting Considerations questionnaire.

Shaking Up Your Thinking With Wildcards

Depending on the diversity of expertise represented, and how naturally equipped your participants are at thinking in whole systems, the group may need help going beyond the obvious connections within the system. Using "wildcards" that have prompts that are both silly and serious, as well as germane and tangential, can force participants to consider new relationships.

Instructions

In advance

- Customize your card deck in advance. This spreadsheet provides a list of sample cards that you may pull from and add to. Be sure to include some cards that represent topics that span from clearly relevant to clearly irrelevant, to keep people on their toes.

- Print or write out your card deck, such that you end up with small stackable cards with a topic written on one or both sides.

At the workshop

- You can choose whether to distribute the cards amongst the group during the initial process of developing a collective conceptual model or after the group has already created a first draft.

- Next, individually or as a group, classify the cards into piles of: (i) definitely irrelevant, (ii) possibly relevant, and (iii) definitely relevant (and discard any cards that are already addressed in the conceptual model).

  - If done individually, set clear time limits for each person, and go in a circle and invite each person to share their cards and how they classified them. Invite others to ask questions or to challenge these classifications, to ensure there is relative agreement.

  - For all of the 'possibly' or 'definitely relevant' connections, add them to your draft model.

  - *BONUS option* that could be incorporated above: for all cards in the 'possibly' or 'definitely relevant' categories, classify as a driver, outcome, both, or other role within your context.

EXAMPLE: Impacts of Clean Cooking on Nutrition, Respiratory Health, and Deforestation

The Bridge Collaborative and the Clean Cooking Alliance partnered to understand the relationship between clean cooking and outcomes for nutrition, health, and deforestation. We held a workshop to kickoff this project and used a results chain as a tool for facilitating, and building upon, a collective understanding of the cause and effect relationships within this system.

In small groups during the meeting, we collaboratively developed a draft results chain using the techniques described previously. Midway, we distributed a deck of 'wildcards' amongst participants, with the above instructions – the cards were an intentional mix from very relevant (air quality) to very silly (shark attacks). Some of the most interesting conversations arose from topics in the middle of that spectrum – for example "plastic pollution" prompted a thoughtful discussion about the packaging associated with 'cleaner' fuels, and potential associated unintended consequences.
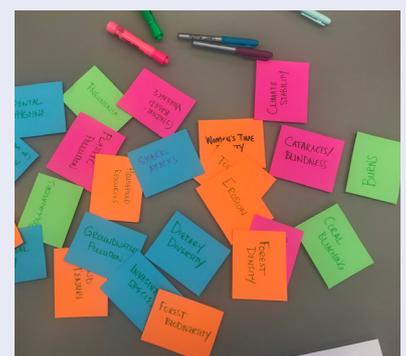
A subset of flashcards used in the Clean Cooking workshop. Photo Credit: Christine Jacobs

Investigating Your Assumptions

To further refine your model, investigate assumptions that may be underpinning it, using questions such as:

- Under what conditions does this relationship hold true? Under what conditions would this relationship no longer be true?
- Are there external factors that play into this relationship?
- Is there more than one major assumption behind this relationship? If so, does it make sense to alter the model to break this relationship down into its component parts?

TIP: assumptions can be related to physical aspects of the system or socio-political aspects of the system (e.g. you can assume something like: wildfire smoke will release particulates that downwind communities are exposed to; or you can assume something like: governance in this region is strong, and enforcement of a ban on hunting will be carried out).

EXAMPLE: Sanitation for and by Nature

The Bridge Collaborative helped design part of a workshop that was convened through a Science for Nature and People Partnership (SNAPP) working group meant to brainstorm how to more fully integrate people and nature co-benefits into nature-based sanitation infrastructure planning. A results chain was created to describe all the potential benefits (and negative outcomes) that a nature-based infrastructure project might provide, and the group split into teams to articulate the assumptions associated with each relationship shown in the results chain diagram. It was through this exercise that the group articulated specific considerations that must be made during the infrastructure planning phase in order for certain co-benefits to accrue.

For example, the diagram shows that installing a nature-based sanitation solution can reinforce local traditions by providing an environment where natural products can be harvested. However, that benefit will only exist if: 1) access is granted to the nature-based infrastructure site, 2) if plants used in the nature-based infrastructure solution are traditional plants of importance to the local community, and 3) if the site is maintained at a level where it is safe and sanitary for people to harvest and use those plants. These seem like simple assumptions, but they are important to verbalize and plan for if you are claiming that a nature-based infrastructure project will truly provide for this type of benefit.

Evaluating Strength of Evidence

Ensuring your model is evidence-based is critical, and evaluating where strong versus weak evidence exists can also inform your decisions. For a quick (but imperfect) exercise, you may invite participants to indicate strong and weak evidence by using different numbered stickers or other indicators. For a more robust approach, see our Evidence Evaluation guidance for a rubric and process to follow.

Identifying Trade-Offs

When striving for benefits across multiple domains, there are often practical tradeoffs which should be proactively explored as inputs to programmatic decision-making. Invite your participants to identify potential tradeoffs through questions such as the following, with suggested notes on how to create a simple coding scheme:

- Which outcomes *must* occur together? (Mark all that must occur together with the same color or symbol)
- Which outcomes *could* occur together? (Mark these with similar colors (e.g. red and orange) or symbols)
- Which outcomes *cannot* occur together? (Mark these with opposite colors (e.g. red versus blue) or symbols)

Identifying Priority Characteristics

- Outcomes may manifest themselves in different communities or time-scales, and these differences may also serve as valuable inputs for prioritization and decision-making. Consider also classifying these outcomes with:
- The communities or stakeholder groups most directly affected
- General time-frame for expected outcome to occur
- Relative cost or value (e.g. high, medium, or low)

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iv) From ideas to action

Taking a more expansive view of the system will likely bring up more linkages to consider than you can feasibly address in the scope of your project, which may feel overwhelming. After developing a broader perspective, it is important to focus in on identifying concrete priorities and actions to act on the new insights obtained.

Setting Priorities

From a broad view of the system, invite participants to weigh in on which linkages are the highest priority to pursue further, which could mean conducting further research, or taking steps to incorporate into your intervention. If you haven't already, establish a common definition of what the overarching priorities are for this project.

- What makes something "important" in this context?
- If you have identified trade-offs that affect communities or stakeholders differently or occur on significantly different time-scales, identify whether certain groups are higher priorities than others, or how to best consider speed of impact in the prioritization.

Below are some approaches for narrowing in on the highest priority connections:

- Simple voting: Give everyone in your group 3-5 sticky dots, and invite them to vote by placing their dots on the connections they believe are most important for your project to further pursue – whether the next steps are conducting additional research, developing interventions, or other actions. You will end up with a ranking of the group's priorities from greatest to least dots.
  TIP: you may choose to allow participants to put more than one (or even all) of their dots on a single connection if they feel it is particularly important.
- Plot on a graph: Decide on two axes that represent the factors that equate to something being a priority for your project, such as 'strength of connection and 'importance of outcome,' and define what this means in your project context. As a group, plot each connection on the graph, with the highly linked and high need quadrant (upper right) showing the top priorities.

Looking Forward & Generating Solutions

The workshop is not an end in itself, but rather it will generate insights and relationships that inform your journey towards the next steps in cross-sector action planning to achieve bigger change, faster. Once the workshop is over, a new chapter of work is now beginning; which next steps you take depends on what your specific project goals are.

Before the end of the workshop, be sure to include time to discuss next steps, so participants see how their time and insights will shape this work going forward. Example types of next steps include:

- Design or refine an intervention to use the insights from this engagement as fodder for exploring creative new solutions. Design Thinking methods can serve as a valuable framework (e.g. IDEO.org's Design Kit provides great resources).
- Establish a research or monitoring program to more fully understand aspects of the system that have been identified as having weak evidence and which are deemed important to better understand.
- Create new partnerships (formal or informal) based on any organizational synergies identified through the workshop, and when appropriate, explore submitting a joint funding proposal.
- Write a joint publication describing the workshop findings and outlining further opportunities for similar types of cross-sector exploration.
- Summarize and share workshop outputs by distributing the learnings to other parties who could benefit from this knowledge.

Regardless of the next steps identified, be sure to identify what is the immediate action that should be taken, who is responsible for carrying it forward, and by when. When a group will continue working together, it is also helpful to agree on a process for tracking action items and reporting back on progress.

Identifying Opportunities

If you have invited external participants who are not formally part of your project, they may now be interested in staying involved or connected. As you prioritize further research questions or types of interventions to explore, consider asking your attendees:

- Who else should we be talking to? (And might you provide an introduction?)
- Do you know of any existing resources (papers, data sources, etc.) that might help us move forward?
- Would you be interested in providing input on future work products that come out of this team?

v) Learning from experience

Beyond the project-level learnings that this engagement has generated, you inevitably will have learned something new from having carried out this experience.

Capturing Learnings for your Colleagues

Have you learned anything from this experience that might benefit other colleagues in your department or organization? If so, consider hosting a 'brown bag' lunch or webinar to share any lessons from this process that others might apply in their work.

Sharing with Bridge

We would love to hear your feedback and stories! What worked well, what didn't? What creative twists did you add? Reach out to us at info@bridgecollaborative.org to share your experience applying tools from this toolkit.

Human Health & Strategic Land Retirement in the San Joaquin Valley, California, USA: A Workshop with The Nature Conservancy's California Program

To provide a concrete example of this guidance in action, below is an outline of the process we followed for the workshop hosted for the project example first described on page 3. The **workshop objectives** in this case were to (i) better understand the causal pathways between agricultural activity and health impacts, (ii) identify which links were the strongest based on available evidence, and (iii) determine where retiring and restoring agricultural lands could most contribute to alleviating negative health impacts alongside benefitting biodiversity.

Who we invited

We sought to engage individuals with expertise in respiratory health, air pollution, and groundwater pollution in the San Joaquin Valley (California, USA). We used a combination of rapid desk research to identify authors of papers on these subjects, as well as organizations working on these issues in the field, such as the U.S. Environmental Protection Agency and environmental justice organizations. We primarily reached out to authors and field practitioners 'cold' (meaning without an introduction) and confirmed six participants with a range of expertise from the University of California, Davis; University of California, Merced; and California State University, Bakersfield.

We found that most people responded very positively to our invitation, and they were pleased to be invited to lend their expertise to an organization outside of their usual collaborators.

Where

This workshop was hosted alongside a conference at Stanford University, which was within driving distance for most of our invitees. However, another great location would have been either UC Davis, where many of our invitees were based, or the San Joaquin Valley, if time and resources allowed.

When

The Nature Conservancy California program's Strategic Land Retirement and Restoration project was already underway and focused exclusively on biodiversity outcomes, yet they had identified an interest in potentially expanding the scope to address human health concerns through future fundraising efforts. The workshop was held three weeks after the idea was proposed, and the workshop itself was four hours long.

What we prepared: We did a scan of literature related to the known health impacts associated with air and water pollution, agriculture's relative pollution contribution, and where pollution is greatest in the region. We articulated this understanding in a situation analysis diagram using Kumu, showing the cause and effect relationships between agricultural activity and environmental outcomes.

Materials shared

In this case, we did not share materials in advance, because all participants were familiar with the geographic context, the focal project was simple to explain, and the situation analysis diagram may not have been an intuitive diagram to digest prior to our time together. We shared a high-level agenda, participant list, and questions to consider for discussion:

- What are the scale and severity of the human health impacts?
- What is the strength of the evidence?
- How big of a role does agriculture play in these health impacts, versus other sources?
- Does the retirement and restoration of agricultural land have the potential to significantly ameliorate these health impacts?
- How does land retirement fit in with other interventions that already exist or are being considered?

Workshop Agenda

See this document for the actual agenda distributed to participants.

i. Setting the Context: We introduced the original project context, what we were interested in learning about, and how the information gathered at this meeting could inform TNC's strategy in the region to benefit human health and biodiversity together. (In this case, we did not use an ice-breaker, because participants arrived at different times due to traffic.)

ii. Understanding Cross-Sector Connections: We structured the majority of our discussions around the situation analysis diagram, and broke participants into small groups to focus on sections of the diagram most relevant to their expertise. We asked them to answer: "Is there anything misrepresented or missing here?" And indeed, the participants made many changes to the situation analysis diagram that drove greater accuracy and specificity about the context in the region. For example, participants distinguished between types of particulate air pollution ($PM_{2.5}$ versus PM_{10}), and they further clarified the relationship between habitat fragmentation, rodent populations, and incidence of Valley Fever.

iii. Honing in on Priorities: As a full group, we asked participants to help us prioritize the types of activities (and resulting sources of pollution) that were most critical to health outcomes, by evaluating the relative contribution from agriculture, estimated number of people impacted, strength of relationship (degree to which a given activity will affect a given impact), and strength of evidence (has this been well-documented in this region?).

iv. Cost: We planned, researched, recruited for, and hosted a workshop with:
A total timeline of **three weeks**
A total staff capacity of **1.25 FTEs**
Less than **$1,000 US** (for food, local travel costs, and printing)