OECM Training Briefing Sheets

To be used with the IUCN/BfN training materials on OECMs

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Contents

Purpose and structure of the briefing sheets

This document contains briefing sheets to guide implementation of exercises within the modules of the IUCN/BfN OECM training by trainers, along with all information needed to brief training participants. Some general guidance on how to implement the training remotely is also provided, to complement the more specific guidance on this in the module scripts.

These are merely suggestions and trainers may replace some exercises by others that they consider more appropriate in a given context, provided that the learning objectives as per module are still met.

The briefing sheets are referenced in the module scripts. Per module, they comprise:

Module A
- A1: Hello
- A2: Stop and go discussion

Module B
- B1: Categories of OECMs
- B2: Applying the screening tool

Module C
- C1: What is FPIC?
- C2: Key steps in seeking consent

Module D
- D1: Exploring recognition and support of OECMs

Module E
- E1: WD-OECM reporting

Module F
- F1: SWOT analysis for OECM action planning

Module X
- X1: A-Z exercise
- X2: Pick your own OECM
- X3: Values and opportunities associated with OECMs

OECM training, Module A, Exercise A-1: “Hello!”

Trainer Briefing Sheet

Purpose of exercise

- Explore and activate initial knowledge/understanding of participants about OECMs
- Support participants getting to know each other
- Establish an active workshop culture

Material required:

- Flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable document (one per group)
- Flipchart or slide with participant briefing (see below)
- Bell, whistle or similar

Number of participants:

- 4-7 per group, i.e. 16-28 if there are four groups.
- With more participants, additional questions can be used, or some groups can be replicated.

Time required:

- 25 min including reporting

Steps

1. Decide which research questions to use in the group work and write them onto cards or A4 sheets. Possible example questions (others are also possible):
    a. Why are you here today?
    b. What practical difference would/will OECMs make to your area of work, in your initial opinion?
    c. What are your expectations from today's workshop?
    d. How do you think OECMs differ from PAs?
    e. in your initial opinion, what value can OECMs add to the established range of area-based conservation instruments?
    f. Do you have a concreate idea of a potential OECM in your geographical area of work?
2. Form 3-4 random groups. Avoid colleagues from one organization staying together in one group. You can simply have people around the table count to 3 or 4 and then start again, and then group all No. 1s, No. 2s etc.
3. Explain the rules and steps of the exercise, based on a flipchart:

Hello!

1. Come together in your group

2. Spend 3 minutes devising a strategy for collecting the information from all participants. Note: time for collecting data will be only 3 minutes.

3. Collect answers to your question from the members of all other groups, for 3 minutes.

4. In your groups, process and summarize findings and produce a reporting flipchart/doc/slide, for 3 min.

5. Report findings back to other groups using your reporting aide, within 2 min per group.

4. Start the exercise using a bell or whistle and time the changes between the stages. Give a maximum of 1 min extra per step.
5. After Step 4, let groups briefly report (max 3 minutes per group). Ask clarifying questions and comment on linkages to upcoming content, but avoid lengthy discussions. Be careful with timekeeping. Often it is easiest to leave the reporting aides of the groups where they are and move the entire group around.
6. Declare the exercise finished, ask people to return to their places on the table (leaving reporting aides where they are) and continue. Refer to summaries on the reporting aides during following discussion where appropriate/helpful.

Source and further reading:

- http://thiagi.net/archive/www/game-hello.html

OECM training, Module A, Exercise A-2: “Stop-and-go discussion”

Trainer Briefing Sheet

Purpose of exercise

- Facilitate a discussion among all participants about perceived values and opportunities associated with OECMs
- Activate prior knowledge/understanding
- Catalyze professional dialogue and peer-to-peer learning among participants

Material required:

- 3-4 facilitation boards, flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable documents
- Flipchart or slide with participant briefing (see below)
- Bell, whistle or similar

Number of participants:

- 4-7 per group, i.e. 16-28 if there are four groups.
- With more participants, group size can be increased to a maximum of 12 per group.

Time required:

- 25 min including reporting

Steps

1. Prepare 3-4 facilitation boards, flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable documents by putting a leading question on top of each of them. Possible example questions (others are also possible):
    a. What types of values do OECMs provide?
    b. How do values provided by OECMs differ from those provided by PAs (if at all)?
    c. What conflicts between conservation and non-conservation values can arise in OECMs, and what can be done about these?
    d. How can OECMs be supported to maintain and enhance their values?
2. Form 3-4 random groups, but different from Exercise A-1. Avoid colleagues from one organization staying together in one group. For instance, you can use a deck of playing cards if culturally appropriate, have people draw cards and form groups of clubs, spades, hearts and diamonds.
3. Explain the rules and steps of the exercise, based on a flipchart or slide:

Stop-and go discussion on values/opportunities associated with OECMs

1. Come together in your group at one of the boards (or with one of the questions on slide etc.)

2. Discuss the leading question on your board and note down answers directly on the board, for 10 minutes.

3. At the trainer's signal, move around clockwise to the next board (or pass around slides with support of trainer), where you will stay for 5 minutes. Read and discuss existing answers. Briefly comment using "!" for agreement, "?" if there is something unclear, and "≠" for disagreement. Add additional answers from the perspective of your group.

4. At the trainer's signal, move on and repeat (3) at the next two boards, where you will stay for 3 minutes each (trainer to provide signal).

5. Short summary reporting from the last group on each board plus some feedback (1 min each) and feedback on how process went.

4. Start the exercise using a bell or whistle and time the changes between the stages.

5. After Step 4, let groups very briefly report (max 2 minutes per group). Ask clarifying questions and comment on linkages to upcoming content but avoid lengthy discussions. Be careful with timekeeping. Often it is easiest to leave the reporting aides of the groups where they are and move the entire group around.
6. Declare the exercise finished, ask people to return to their places on the table (leaving reporting aides where they are) and continue. Refer to summaries on the reporting aides during following presentation where appropriate/helpful.

Source and further reading: -

OECM training, Module B, Exercise B-1: “Categories of OECMs”

Trainer Briefing Sheet

Purpose of exercise

- Participants apply OECM definition and criteria to their home situation
- Additional awareness of added value and opportunities associated with OECMs in the specific work context of participants
- Awareness of the diversity of (potential) OECMs
- Laying foundation for subsequent exercises in Module B and (where planned) following modules

Material required:

- Flipcharts with markers or laptop computers with exercise PPT or assigned spaces on a virtual whiteboard
- Flipchart or slide with participant briefing (see below)
- Bell and/or visible timer[1]

Number of participants:

- 7 per group max (no limit to number of groups).
- With more participants from one country, group size can be increased or two groups run in parallel. At groups sizes above seven individuals, active participation becomes more difficult. Larger working groups should therefore be avoided.

Time required:

- 35 min: 5 min introduction to exercise PPT and briefing, 15 min brainstorming in working groups, 15 min discussion including non-systematic reporting, experiential feedback (“How did it go? What went well, what did not go well? Etc.) and clarifying questions.

Steps

1. Distribute a template for the exercise flipchart (below) or the exercise PPT to participants;

[1] In a classroom setting, timers with large visible displays work well to keep participants aware of how much time is left within each exercise. One example are those by Time Timer (https://www.timetimer.com/pages/united-states), but there are many others. Otherwise, the facilitator needs to give a half-way and 5 five-minute warning, to keep working groups on track. Most virtual workspaces/whiteboards also have inbuilt timer functions.

Categories of OECMs

1. Come together in your group

2. Make a list of categories of areas in your country or jurisdiction that might be potential OECMs. This could be structured by governance type (e.g. community forests). You could also arrange this by biome: terrestrial, freshwater, marine, other.

- Government:
- Private:
- Indigenous and community:
- Joint governance arrangements:

3. Nominate a reporting person to briefly summarize your ideas during plenary reporting.

2. Start the exercise using a bell or whistle and put a timer well visible into the seminar room.
3. Once time is up, reconvene the plenary and let groups briefly report. Ensure that reporting does not become too lengthy and repetitive. You could assign one governance type to each group for reporting and ask the other groups to only add additional ideas afterwards. Ask probing questions to make groups think about their initial ideas. In a classroom setting, it is often easiest to leave the reporting aides of the groups where they are and move the entire group around.
4. Ensure results are documented on flipcharts (and then photographed), on the "exercise PPT" or on a virtual whiteboard.

Further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773

OECM training, Module B, Exercise B-2: “Applying the screening tool”

Trainer Briefing Sheet

Purpose of exercise

- Participants practice use of OECM screening tool
- Participants refine their understanding of the criterial of a “potential OECM”
- Laying foundation for exercises in following modules (where planned)

Material required:

- Flipcharts with markers or laptop computers with exercise PPT or assigned spaces on a virtual whiteboard, criteria card (Appendix 1)
- Flipchart or slide with participant briefing (see below)
- Bell and/or visible timer[2]

Number of participants:

- 7 per group max (no limit to number of groups). Same groups as for exercises MB-1 can be used.
- With more participants from one country, group size can be increased or two groups run in parallel. At groups sizes above seven individuals, active participation becomes more difficult. Larger working groups should therefore be avoided.

Time required:

- 90 min: 5 min briefing, 55 min working through the screening tool in working groups, 30 min discussion including non-systematic reporting, experiential feedback (“How did it go? What went well, what did not go well? What did you learn about OECMs during this exercise? Etc.) and clarifying questions.

Steps

1. Distribute a template for the exercise flipchart (below) or the exercise PPT to participants;
2. Start the exercise using a bell or whistle and put a timer well visible into the seminar room. Given the relatively large duration of the exercise, the trainer/facilitator should provide milestones at about the 50% completed (after Test 2) and 75% completed (after Test 3) stage and give a five minutes warning at the end of the exercise.

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[2] In a classroom setting, timers with large visible displays work well to keep participants aware of how much time is left within each exercise. One example are those by TimeTimer (https://www.timetimer.com/pages/united-states), but there are many others. Otherwise, the facilitator needs to give a half-way and 5 five-minute warning, to keep working groups on track. Most virtual workspaces/whiteboards also have inbuilt timer functions.

Categories of OECMs

1. Come together in your group
2. Go through the questions of the screening tool (see criteria card below) and discuss in your working group if the criteria listed therein are met, and why you think so.
3. Document your answers on a flipchart (then to be photographed), on the “exercise PPT” or on a virtual whiteboard
4. Nominate a reporting person to briefly summarize your ideas during plenary reporting (4 min max).

3. Once time is up, reconvene the plenary and let groups briefly report (ca. 5 min per group in a four-group setting; adjust time to number of groups in other settings). Ensure that reporting does not become too lengthy and repetitive. Ask probing questions to ensure criteria of potential OECMs have been used properly and rigorously. In a classroom setting, it is often easiest to leave the reporting aides of the groups where they are and move the entire group around.

4. Ensure results are documented on flipcharts (and then photographed), on the “exercise PPT” or on a virtual whiteboard.

Further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773
- Site-level methodology for identifying ‘other effective area-based conservation measures’ (OECMs) https://www.iucn.org/commissions/world-commission-protected-areas/our-work/oecms

OECM training, Module C, Exercise C-1: “What is FPIC”

Adapted from Edwards et al. (2012)

Trainer Briefing Sheet

Purpose of exercise

- Participants develop a clear understanding of what is Free, Prior, Informed Consent (FPIC)
- Participants are aware of the critical importance of FPIC for OECM designation.

Material required:

- Four or five flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable document (one per group)
- Flipchart sheets with prepared definitions of FPIC (see below)
- Bell, whistle or similar

Number of participants:

- Up to 30
- With more participants, some groups can be replicated

Time required:

- 10 min

Steps

1. Introduce the session by explaining that during this session you would like to find a shared definition and understanding of FPIC that could be used during the course.
2. Paste at least three different definitions around the walls of the room written in large text that can be seen from a distance. Possible definitions with corresponding trainer’s notes from Edwards et al. (2012) are listed below:

Possible definitions of FPIC

FPIC is based on principles of self-determination. It is the collective right of indigenous peoples and local communities to negotiate the terms of externally imposed policies, programs, and projects that directly affect their livelihoods and well-being.
(Trainer's Note: This statement highlights the element of respecting rights in FPIC and differentiates between indigenous peoples and local communities in the context of self-determination – introducing the term for the first time. It promotes discussions around power to negotiate and highlights that this may therefore be an ongoing process.)

FPIC is a form of decision-making that enables a community to say "yes" or "no" to a proposed project or intervention.
(Trainer's Note: This statement highlights consent as one form of decision-making and promotes discussions on how it is different as it highlights the concept of yes or no. However, it throws no light on the FPI elements on the acronym.)

Free, prior, and informed consent (FPIC) is consent that is given freely, by people fully informed of the consequences, prior to any decision being made, and according to their own decision-making processes.
(Trainer's Note: This statement highlights the form of decision, i.e., consent, and the meaning of the qualifying words (FPI). It is specific and provokes discussion on what consent really is – but it does not directly interpret it in the form of a yes/no decision).

FPIC is part of a consultation process that allows people to provide input into how their natural resources are managed.
(Trainer's Note: This statement is extremely general about FPIC in relation to wider consultation and natural resources. It does not capture the essence of what consent is and the shift of power in terms of "yes" or "no" to the communities. Although it cannot be categorized as wrong, those who pick this statement need to be challenged on the difference between consent and consultation. Consent is really a process of 'seeking' consent).

FPIC is when consultation and negotiation are done without forcing people to participate in a project.
(Trainer's Note: Similar to the statement above this one confuses the process with the outcome. Consultation and negotiation are part of the process of seeking consent, but consent itself is the power to say yes or no to a project. Participants need to be challenged on the difference between the process and outcome. Consent is an outcome and cannot be equated to consultation or negotiation. This also highlights only some of the principles of "free," as 'without force' does not necessarily mean without manipulation – which is a common form of project presentations.)

3. Read out loud all the definitions and then ask each participant to stand under the definition they most agree with. If conducting the exercise online, ask participants to place a note with their name next to the definition they most agree with on the virtual whiteboard.
4. After they have taken positions, ask the groups under each definition to briefly explain to other members in the same group why they are standing there and formulate reasons to share with other groups. Use chat functions or ad-hoc group formation to do so in a remote setting.
5. After five minutes, ask each group to share its reasons and give the floor to the other participants to ask clarifying questions.
6. Try to summarize reasons after every presentation. Highlight the key words the participants agree with in the definition by underlining them with a red pen (collective right, yes or no, self-determination, process, negotiation, etc.).
7. After completing the sharing process, bring the group back into plenary and summarize by examining some of the key words underlined in the definitions.
8. If there is time left, reflect on the exercise, asking: A) Based on the discussion, what are the key concepts that are part of FPIC? B) What do you think is the key difference between consent and consultation? And consent and negotiation? C) Why is FPIC critically relevant to OECMs?
9. Summarize the key elements of FPIC. Emphasize that it is important that the participants do not think of FPIC as a general approach. It is not a general approach, it is a different way of making a decision in relation to an external proposal whereby people have the opportunity to say ‘yes’ or ‘no’ and negotiate their own terms. Stress that it is CONSENT that is being sought (which is free, prior, and informed).

Source and further reading:

- Edwards et al.: https://www.recoftc.org/sites/default/files/public/publications/resources/recoftc-0000211-0001-en.pdf

OECM training, Module C, Exercise C-2: “Key steps in seeking consent”

Adapted from Edwards et al. (2012)

Trainer Briefing Sheet

Purpose of exercise

- Participants are aware that there is a need for a structured process to seek and obtain consent for OECMs, including five broad generic steps
- Participants invent concrete ways of seeking consent to OECMs that are relevant to their context

Material required:

- Four-five flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable document (one per group)
- Flipchart sheets with prepared definitions of FPIC (see below)
- Bell, whistle or similar

Number of participants:

- Up to 30 in groups of 4-5 (randomly formed)

Time required:

- 35 min: 5 min briefing, 15 min group discussion, 5 min comparison with other group outputs, 10 min final plenary discussion

Steps

1. Explain to the participants that this exercise is about key steps in seeking consent for OECMs, and that you invite them to jointly explore five key elements (generic steps).
2. Using cards, one by one, paste each key step on the wall in a random pattern, reading out the words. Explain that these steps should not necessarily be carried out in sequence given but are essential. When you read out each element or step, do not explain the steps in detail – just make sure they understand the meaning of the words used.
3. Form groups of four to five people from different contexts or stakeholder perspectives. Simply count to five repeatedly or use a similar group formation procedure.
4. Give each group their own set of ‘steps’ cards, explaining that they are identical to what you have pasted on the wall.
5. Present the format for the discussion: a table with three columns (see below) and tell them to discuss the cards in the order they feel comfortable, picking those they are most familiar with first.

Key steps in seeking consent for OECMs

- Selecting appropriate decision-making institutions
- Developing a process for seeking and obtaining consent in the context of the OECM designation process
- Monitoring and recourse: maintaining consent
- Developing a grievance process
- Verification of consent

Steps	Why is this step important?	What would happen if this step was missed?	Who should take the lead?
Selecting appropriate decision-making institutions			
Developing a process for seeking and obtaining consent in the context of the OECM designation process			
Monitoring and recourse: maintaining consent			
Developing a grievance process			
Verification of consent			

6. After 15 minutes, call the group back together and display the work on flip chart stands or the wall. Ask each group to read the other groups' work, spending 5 min to go through the

other groups' output. Line up the charts across a space so they can easily be compared visually by both the trainers and the participants.

7. Facilitate reflection (10 min) on the exercise by asking:
   - Do all the groups have similar reasons for the importance of the steps? What is different? Do other groups agree?
   - Are the steps linked? How and why? Should they be sequenced in a particular way? Why?
   - Which steps require more emphasis, in what contexts, and why?
   - What are the patterns emerging across the implications of skipping steps?
   - Which steps do you think would be commonly ignored or skipped? Why? How could this be addressed?
   - Who should take the lead in which steps and why?
8. Wrap up by emphasizing that these steps are not set in stone. Seeking consent for OECMs is an organic process, evolving through practice, and each step may need more emphasis and time than another in a given context.

Source and further reading:

- Edwards et al.: https://www.recoftc.org/sites/default/files/public/publications/resources/recoftc-0000211-0001-en.pdf

OECM training, Module D, Exercise D-1: “Exploring recognition and support of OECMs”

Trainer Briefing Sheet

Purpose of exercise

- Participants understand the need for recognition and support of OECMs
- Participants explore possibilities for recognition and support to OECMs in their context

Material required:

- Flipcharts with markers or laptop computers with exercise PPT or assigned spaces on a virtual whiteboard or shareable document (one per group)
- Flipchart or slide with participant briefing (see below)
- Bell, and/or visible timer[3]

Number of participants:

- 7 max per group. Same groups as for exercises MB-1 and MB-2 can be used
- With more participants from one context, group size can be extended

Time required:

- 30 min: 5 min briefing, 20 min group work, 5 min reporting and feedback

Steps

1. Form 3-4 random groups. Avoid colleagues from one organization staying together in one group. You can simply have people around the table count to 3 or 4 and then start again, and then group all No. 1s, No. 2s etc.
2. Explain that the following exercise is aimed at connecting the concepts of OECM recognition and support to the home contexts of participants. They are requested to think about the following 2 questions and note down responses on the exercise PPT, flipchart or virtual whiteboard:

[3] In a classroom setting, timers with large visible displays work well to keep participants aware of how much time is left within each exercise. One example are those by Time Timer (https://www.timetimer.com/pages/united-states), but there are many others. Otherwise, the facilitator needs to give a half-way and 5 five-minute warning, to keep working groups on track. Most virtual workspaces/whiteboards also have inbuilt timer functions.

Recognizing and supporting OECMs

1. Come together in your group

2. Spend approximately 10 minutes each discussing the following questions:
- Under which laws or other legal/policy mechanisms can you recognise OECMs in your country?
- How can you determine the kinds of support this area needs (if any)?

3. Document answers on a flipchart, virtual whiteboard or in the exercise PPT and be ready to briefly summarize in plenary (2 min max)

3. After Step 2, let groups briefly report (max 3 minutes per group). Ask clarifying questions and comment on linkages to main presentation content but avoid lengthy discussions. Be careful with timekeeping. Often it is easiest to leave the reporting aides of the groups where they are and move the entire group around.

4. Declare the exercise finished, ask people to return to their places on the table (leaving reporting aides where they are) and continue. Refer to summaries on the reporting aides during following discussion where appropriate/helpful.

Source and further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773

OECM training, Module E, Exercise E-1: "WD-OECM Reporting"

Trainer Briefing Sheet

Purpose of exercise

- Participants understand the reporting requirements of the World Database of OECMs
- Participants consider how and where the information for effective OECM reporting can be sourced
- Participants broaden their awareness of the diversity and types of OECMs

Material required:

- Flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable document (one per group)
- Blank OECM database source table (see below)
- Bell and/or visible timer[4]

Number of participants:

- 4-7 per group, i.e. 16-28 if there are four groups. Same groups as for exercises MB-1, MB-2 and MD-1 can be used.
- With more participants from one context, group size could be extended.

Time required:

- 30 min including general experiential feedback (no detailed reporting)

Steps

1. Participants re-join case groups. Each group gets a blank WD-OECM Source Table (see below) and the explanations included in the WDPA/WD-OECM user guide V1.6, Appendix 1, pp. 44-61.
2. The task is to fill in the source table for the OECM chosen, and to note any challenges and/or questions that occur in the process. This will alert participants to the data needs involved in

[4] In a classroom setting, timers with large visible displays work well to keep participants aware of how much time is left within each exercise. One example are those by Time Timer (https://www.timetimer.com/pages/united-states), but there are many others. Otherwise, the facilitator needs to give a half-way and 5 five-minute warning, to keep working groups on track. Most virtual workspaces/whiteboards also have inbuilt timer functions.

reporting OECMs and also to the details of deciding which information to enter in each field[5].

3. Participants are also asked to document any observations on the process of filling in the Source Table, on a separate flipchart.
4. After the exercise, participants report on how well the exercise went, which reporting information was easily available and which wasn't, where they perceived ambiguities in the Source Table, and what they think could be done to pro-actively make available the information that will be needed for effective reporting to the World Database of OECMs. This information is documented.

Source and further reading:

- WDPA and WD-OECM Manual: WDPA_WDOECM_Manual_1_6.pdf

[5] Even if most participants will never be tasked with OECM reporting - as is likely - this will help them to better understand the full range of OECMs, particularly in terms of governance, and will make it easier for them to interpret and use WD-OECM data.

Appendix 1. WD-OECM source table template for reporting exercise. Fields that are filled by WCMC (not data provider) are shaded in grey. Fields meeting the minimum reporting requirement have bolt text, those meeting the complete reporting requirement do not. See the WD-OECM-manual, Table 3.1 and Appendix 1, for meaning of field names and further instructions.

Field name	Your entry
WDPAID	
WDPA_PID	
PA_DEF	
NAME	
ORIG_NAME	
DESIG	
DESIG_ENG	
DESIG_TYPE	
~~IUCN_CAT~~	
INT_CRIT	
MARINE	
REP_M__AREA	
GIS_M_AREA	
REP_AREA	
GIS_AREA	
NO_TAKE	
NO_TK_AREA	
STATUS	
STATUS_YR	
GOV_TYPE	
OWN_TYPE	
MANG_AUTH	
MANG_PLAN	
VERIF	
METADATAID	
SUB_LOC	
PARENT_ISO3	
ISO3	
SUPP_INFO	
CONS_OBJ	
REP_AREA	

OECM training, Module F, Exercise F-1: “SWOT analysis for OECM action planning”

Trainer Briefing Sheet

Purpose of exercise

- Participants widen their perspective from the individual OECMs they have been thinking about during most of the exercises of the training to the overall contribution of and enabling conditions for OECMs in their context
- Identification of intervention points for strategic actions to strengthen and promote OECMs
- Foundation and backbone of context-specific action plans to strengthen and promote OECMs in participants’ contexts

Material required:

- Flipcharts with markers or laptop computers with PPT or assigned spaces on a virtual whiteboard or shareable document (one per group), with SWOT table (see ***below***) drawn on it
- Flipchart or slide with participant briefing (see below)
- Bell and/or visible timer[6]

Number of participants:

- 4-7 per group, i.e., 16-28 if there are four groups. Same groups as for exercises B-1, B-2, D-1 and E-1 can be used – important is that group members are from one joint context for which an OECM action plan could be developed.
- With more participants, maximum group size can be increased.

Time required:

- 30 min: 5 min briefing, 20 min group work, 5 min summary reporting.

[6] In a classroom setting, timers with large visible displays work well to keep participants aware of how much time is left within each exercise. One example are those by Time Timer (https://www.timetimer.com/pages/united-states), but there are many others. Otherwise, the facilitator needs to give a half-way and 5 five-minute warning, to keep working groups on track. Most virtual workspaces/whiteboards also have inbuilt timer functions.

Steps

1. Trainer introduces the SWOT analysis as a basis for OECM Action Planning and explains that – similar to all strategic planning processes – sound planning needs to be preceded by situation analysis. This analysis shall be conducted as a SWOT analysis.
2. Trainer explains the exercise based on a flipchart or PPT slide (below)

SWOT Analysis as basis for OECM Action Planning

1. Come together in your group and find a workspace.
2. Use about 15 min to note down both internal factors (strength and weaknesses) and external factors (opportunities and threats) in relation to <u>the contribution of OECMs to existing area-based conservation systems in your context (country/jurisdiction)</u>. Think of legal, economic, political, institutional, capacity-related, cultural etc. factors and use the following table:

Strengths	**Opportunities**
• …	• …
Weaknesses	**Threats**
• …	• …

3. Look at your SWOT analysis and pick one crucially important strength, opportunity, weakness and threat each. Identify actions to leverage or maximize strengths, reduce weaknesses, control threats and make the most of opportunities. Note down your ideas with a different color, right in the SWOT table (5 min).
4. Be prepared to summarize your findings in the plenary.

3. Start the exercise and remind participants when it is time to move from the basic SWOT to the action identification step.
4. After Step 3, let groups briefly report (max 1-2 minutes per group). Ask clarifying questions and comment on linkages to upcoming PPT's content but avoid lengthy discussions. Explain that the identified actions are only meant as examples, and that a more comprehensive process would be needed to identify a full action plan. Be careful with timekeeping. Often it is easiest to leave the reporting aides of the groups where they are and move the entire group around.
5. Declare the exercise finished, ask people to return to their places on the table (leaving reporting aides where they are) and continue. Refer to summaries on the reporting aides during following discussion where appropriate/helpful.

Source and further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773

OECM training, Module X, Exercise X-1: “A-Z Exercise”

Trainer Briefing Sheet

Purpose of exercise

- Explore and activate initial knowledge/understanding of participants about OECMs
- Establish an active workshop culture and a positive energy
- Activate lateral/associative thinking and relax preconceived ideas about OECMs

Material required:

- One A4 sheet or shareable document per participant

Number of participants:

- Up to 50

Time required:

- 15 min including reporting

Steps

1. Explain to participants that this exercise is aimed at activating and exploring their prior ideas/knowledge/opinions on OECMs.
2. Ask participants to put letters A-Z in column on left-hand margin of an A4 sheet or portrait oriented shareable document (if online)
3. Give them 10 min to put down keywords summarizing their current knowledge, understanding, doubts, ideas etc. regarding OECMs for each of the letters. No need to go systematically from A-Z, jumping between letters allowed.
4. Brief non-systematic reporting: How many entries do participants have, individual “best” entries, entries that were not mentioned yet, difficulties, reactions to keywords of others, etc.
5. In response to the reporting, appreciate the contributions of individuals and point out cross-linkages to content that will be covered during the training.
6. To wrap up, tell participants to keep their A-Z lists and to see if they will be able to add additional terms/ideas at the end of the training.

Source and further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773

OECM training, Module X, Exercise X-2: “Pick your own OECM”

Trainer Briefing Sheet

Purpose of exercise

- Participants practice the use of the OECM screening tool and familiarize themselves with it
- Participants develop awareness of the information needs of OECM screening and of the possible ambiguities in applying the OECM criteria

Material required:

- Notebooks or computers for participants
- Flipchart to display guiding questions, markers for facilitator to take general notes
- Bell and/or visible timer

Number of participants:

- Up to 40

Time required:

- 20 min including reporting

Steps

1. Tell participants that this exercise is about practicing use of the OECM screening tool.
2. Participants are asked to come up with one example each of an area that they think might qualify as OECMs.
3. Participants individually apply the OECM criteria from the screening tool as introduced in the previous presentation, for 10 min.
4. After individual work, there is non-systematic reporting (those participants who wish to take the floor only), based on the guiding questions as shown below.

Pick (and analyze) your own possible OECM – leading questions for reporting

1. What was your area, and did you conclude it is an OECM? If not, why not?
2. Which criteria did you find easier to work with, which more difficult? Where did you encounter ambiguities?
3. Which knowledge gaps relevant to the identification of OECMs did you find?.

5. Short final slot on general questions on site level methodology.

Source and further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773

OECM training, Module X, Exercise X-3: “Values and opportunities associated with OECMs”

Trainer Briefing Sheet

Purpose of exercise

- Participants are invited to think about concrete values and opportunities associated with OECMs, in their work context
- Active workshop culture maintained
- All participants can actively contribute their ideas

Material required:

- One large facilitation board (or flipchart if not available) with markers and 50 metaplan cards (10*20 cm, unicolor) or one a collaborative whiteboard

Number of participants:

- Up to 50

Time required:

- 10 min including reporting

Steps

1. Tell participants that this exercise is going to collect their view on which values and opportunities are associated with OECMs, in relation to existing area-based conservation systems. Write this question on top of a facilitation board or flipchart.
2. Hand out facilitation cards and markers to participants or place them onto tables/floor beforehand. Participants have five minutes to note down some ideas (up to three per individual), one idea per card, 3 lines per card max.
3. Collects and group (based on types of values or other relevant thematic categories) cards on brown board, asks for clarification, comments.
4. Facilitation board is left on stage for comparison with following session.

Source and further reading:

- Guidelines for Recognising and Reporting OECMs: https://portals.iucn.org/library/node/48773

Instructions for conducting the training modules remotely

Purpose of this section

This document provides general guidance on conducting the modules of the OECM training as webinars/remote interactive trainings. It complements the module scripts and trainer briefing sheets, which contain more specific information on how individual modules and exercises can be run online.

This document is NOT a general introduction to conducting webinars. We refer to available generic guidance on this, as is available on the web (e.g. http://www.doolecommunications.com/blog/, https://www.hyperisland.com/business-solutions/remote-working-toolbox) and from most webinar platforms. The document is not specific for any webinar platform and does not provide detailed guidance on how to use specific webinar platforms, collaborative whiteboards or cloud-based storage systems. This is because specific platforms and other software will be chosen differently for various trainings, depending on context.

Requirements for conducting the training online

Hardware requirements:

- Modern desktop or laptop computer (at least 4GB or more of RAM);
- Webcam, headset and (if not included in headset) microphone; USB connections are better than Bluetooth for this purpose;
- Stable internet of at least 1 Mbps. Ensure that not only the trainer(s) but also all participants have sufficient internet to run the remote training;
- Reasonably quiet workspace with sufficient light (preferably natural light from front; beware of backlighting effects)

Software requirements:

- Standard office software including PowerPoint
- Standard web browser (e. g. recent versions of Google Chrome, Mozilla Firefox, Apple Safari, Microsoft Edge etc.)
- Webinar app or browser version (e. g. Zoom, Jitsi Meet, Adobe Connect, GoToWebinar, Microsoft Teams, BigBlueButton, etc.) - apps usually work better than browser-based versions;
- Collaborative Whiteboard (e. g. Mural, Miro, Google Jamboard, etc.);
- Cloud-based data storage and editable online documents (e. g. Google Docs/Google Drive).

Skills and competences required:

- At least solid proficiency with using all of the above;
- Experience in online training facilitation;
- If possible, one co-facilitator/producer exclusively dedicated to the technical aspect of running the training, e. g. navigating the application, forming and dissolving groups, technical troubleshooting for participants, etc.
- A basic familiarity of all training participants with the webinar/teleconferencing platform and collaborative whiteboard is necessary. If this cannot be assumed as a given, an introduction to this technology has to be offered before the training.

Preparation and rehearsal time:

- Presenting a training online typically leaves less room for improvisation and requires more detailed preparation. Ensure that all inputs, instructions, worksheets etc. are prepared online well in advance of all modules and upload them if using a format that allows this. Calculate about the same time as for the seminar itself for preparation and rehearsals.

Adaptation of individual modules

With all of the above in place, all modules of the training can be run as online trainings. Detailed instructions on how to do so are included in the Module scripts.

Advice for effective training webinars

- Plan in detail and rehearse thoroughly. Ensure participants also prepare adequately and have the required equipment in place once the webinar starts.
- Ask participants to use headsets to reduce echo and to mute themselves when not speaking.
- If bandwidth allows, insist on participants using their webcam at least when speaking and during introductions.
- Do not reduce introductory exercises. If anything, more time needs to be invested in building personal relationships between workshop participants in remote settings.
- Use the chat function of webinar platform to send briefing sheets etc.
- Use breakout rooms for group works. Pre-set or allocate people directly to rooms during training. The latter works best with a technical co-facilitator.
- Build in relaxing interactive energizers where necessary, such as those available here: https://www.hyperisland.com/business-solutions/remote-working-toolbox/remote-energizers, DIY-Toolkit-Full-Download-A4-Size (berlin-innovators.com).

More in-depth advice is available from the sources listed above.