Integrated Biodiversity Management, South Caucasus

Team event
"How to be a good advisor?"

Susanne Arlinghaus and Roland Hackenberg

Report

02/2016

german cooperation
DEUTSCHE ZUSAMMENARBEIT

Implemented by
giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Table of Contents

Annexes

1. List of participants
2. Programme of the training
3. Evaluation forms (Summary annexed, original version with GIZ IBiS)
4. Photo-documentation (sent by dropbox link)

1 Introduction and background

The natural resources in the countries of the Caucasus are not being managed in a sustainable way. The causes can be found in the economic, political, socio-normative and institutional framework conditions. The objective of the GIZ programme in the region South Caucasus is to integrate and implement the concept of a sustainable management of biodiversity at local, national and regional level as a means of the protection of resources in state, economy and society.

SMBP has ended on November 30th, 2015. The following programme “Integrated Biodiversity Management in South Caucasus, IBiS“ has been approved by BMZ to run from 01.12.2015 to 30.11.2018. In this programme the major activities of SMBP are being continued, and also new directions are being taken, as e.g. „Mainstreaming of Biodiversity” or a stronger focus on activities in selected pilot areas of the three countries Armenia, Azerbaijan and Georgia.

The stronger conceptual focus of IBiS on mainstreaming of activities and results at national and especially local level demands an enlarged understanding of tasks of the national and international staff. In addition to technical advice, the facilitation of knowledge and capabilities, competencies at individual, organization and systemic level for short and long term advisory are required.

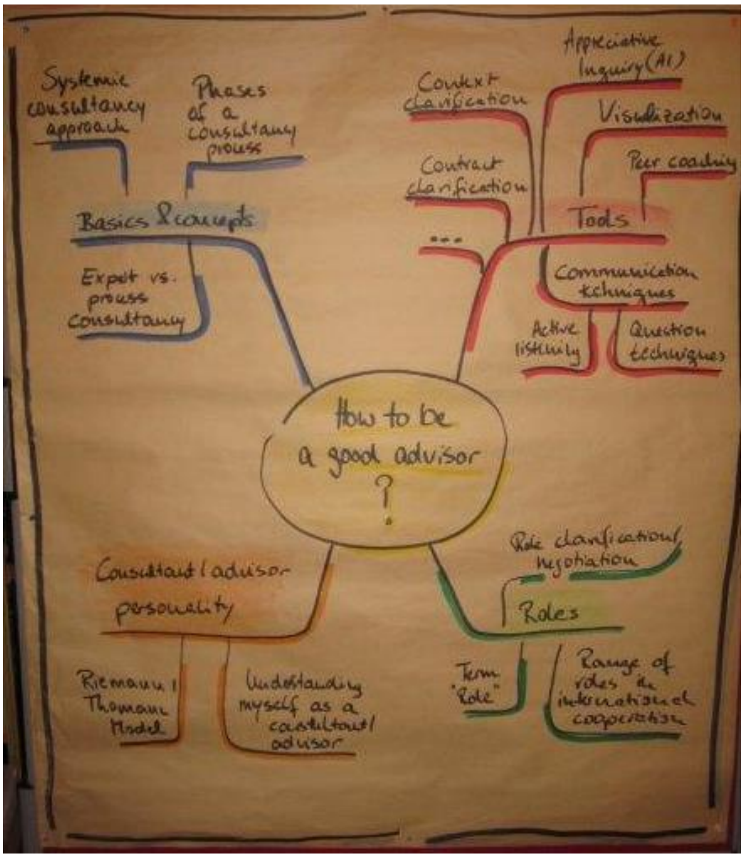
Therefore, a team event was planned in order to facilitate knowledge and capabilities which allow the staff of the IBiS programme to define their role as advisors more clearly and improve their competencies in the field of advisory.

2 Objectives of the event

The objectives of the training were as follows:

Participants have clarified their roles and improved their competencies as advisors by:

- deepening the concept of capacity development and the role of process consultancy and partner orientation in their programme
- differentiating between technical advice and advice towards change processes
- getting to better understand the different roles as advisors in international cooperation
- critically reviewing their role as advisors and the expectations of their partners towards them
- practically applying newly acquired tools and approaches during the workshop, closely supervised by the trainers
- learning to continuously review and improve advisory approaches towards a more sustainable capacity development approach



On the basis of these objectives and the possible topics given in the mind map, the participants developed their learning goals for the week, the motto being: you can only learn what you want to know. The learning goals comprised a lot of basic aspects such as “What is the scope of our work, where are limits to advisory?” or “How to systematically structure the advisory process?.” Another strong focus of the participants was looking at challenging situations in advisory: “How to deal with unstable commitment of partners?” or “…partners without decision making power?” and “How to deal with low ownership?” or “Creating a need of GIZ support”. Other learning questions were addressing the tool box in general as well as the roles and the advisor’s personality. Topics which were a little outside the previously determined contents were “Negotiation skills” and “Conflict resolution (mediation)”.

These learning goals gave the participants and the trainer/facilitators good orientation on the focus of the event. Similar to an advisory context, where expert and process advisory are playing a role, the responsibility of achieving these learning goals is in the hands of both sides, the trainers/ facilitators and the participants. The trainer cannot learn on behalf of the participants and the participants do not only learn from the trainer but also from each other and develop their own thoughts based on the questions and experiments presented.

3 Core aspects of the team event

In the following chapters the core elements of the event are briefly described, illustrated and put into context. Additionally, core topics in advisory are deepened in “info boxes”.

3.1 Advisory on stage – theatre pieces of typical advisory situations

In order to get an overview of the situation regarding the topic of advisory in the region in a light way the participants were asked to split up in groups and develop as well as stage a brief theatre play representing the main characteristics of their respective reality as GIZ advisors.

The groups displayed very diverse situations:
The **first Georgian group** started with a municipal representative hectically calling some shepherds and farmers, because she had forgotten all about the GIZ meeting. Upon their arrival both the farmer and the shepherd swore they would never burn their fields, that’s all done by “the others”, but honestly speaking they also claimed burning “helps” people: it is good because then the green is fresh, no insects would be there…, but of course, they would not do it. The GIZ advisor was happy to have that kind of result out of – as he claimed – this “Multi-Stakeholder-Dialogue”. While he and the representative of the municipality and the Ministry representative were staying for the supra and toasted to that wonderful result, the shepherd and the farmer returned to their work and started burning anyway.

What could be seen there? While GIZ speaks of the Multi-Stakeholder-Dialogue and it seems a very long term, serious event, it is only a hectically organized get together. Content wise the actors do not feel tied to their words, they are only involved for this time. Talking about the issue they start a blame game rather than looking at which strategies can help to actually replace the burning.

The **Armenian group** based their play on the known joke on advisory: An advisor flies into a rural remote area and finds a shepherd to talk to. The conversation is initiated by the GIZ, with no demand from the shepherd side: the offer is to analyze the number of sheep and when successful the payment would be one sheep. After the long technical analysis the advisor comes up with the number. The result is commented on by the shepherd: now I know who you are, you are an advisor! You come from far away when nobody asked you to come, you tell me what I know already, and you even do a mistake: this is my dog not a sheep!

What could be seen? Experts with no field experience will have difficulties of actually getting a feel for the situation and find out what the real needs of the people are. The communication will not be easier when relying on a translator and having no own experience of the cultural habits and no-gos!

The **second Georgian group** enacted a piece looking at the cooperation of the different actors in the international cooperation: in order to construct a power line KfW and GIZ are invited, even though KfW immediately leaves the scene again having more important business to attend to, a national consultant is looked for to implement, and actually just an "experienced friend" is proposed to do the job. The whole thing is documented finely by the PR lady to put it into a success story.

What could be seen? It is essential that partners communicate their need timely and clearly. Also it is important to have well-agreed and planned interventions (to avoid fire brigade activities).

The **Azeri group** took a typical scene looking at an example of cooperation with the Ministry:

After having waited for a long time for the meeting, the Minster still does not have much attention for the group, has not read the proposal sent previously and just puts a few impatient questions sending them away again with a list of things to work on before accepting the proposal. When coming back with their work, the same thing happens again which delays work for an undetermined time.

What could be seen? The Ministry displays having more power in the relationship, maybe not even needing nor accepting the GIZ for any real important activity, showing this by rude communication, refraining to share information etc.

The group reflected on what they have seen afterwards.

First they looked at **similarities** between the plays and the countries.

- Concerning our roles there were examples of expert AND process advisory.
- A joint vision on program/issues was missing.
- Long term vision and political will were missing. In all plays there was no time and no interest by the partner.
- There were different approaches between partners and GIZ and a different understanding of the same topic.
- The stage might not be prepared to do advisory as the Azeri case demonstrated: there is no mandate, problem definition, joint expectation, no idea how to interact.
- Sometimes GIZ might be in a mediator role as a consultant, but there is no mandate.
- Awareness and ownership of problems are missing with partners.

- The developed topics, tools, ideas are not really understood or even not relevant for the partner.
- There are coordination problems between different stakeholders.
- Another common aspect was the question: Who are we talking to? Who is the commissioner?

The second question was looking at the **resources** that were visible in the role plays:

1. GIZ Resources:
   - Knowledge of local situation
   - Ability to work in multi-stakeholder situations
   - Capacity as experts
   - Understanding what the partner wants, "adaptability" to partner needs
   - Good reputation
2. Resources and strengths of partners:
   - Each partner has own interests and own capacity => We can understand what they want and find common ground.
   - Success of the GIZ programme equals and depends on successful partners
   - The partners are quick in mobilizing people
   - They have the decision-making power.

The Lessons Learnt and aspects to deal with during the training of the role plays were:

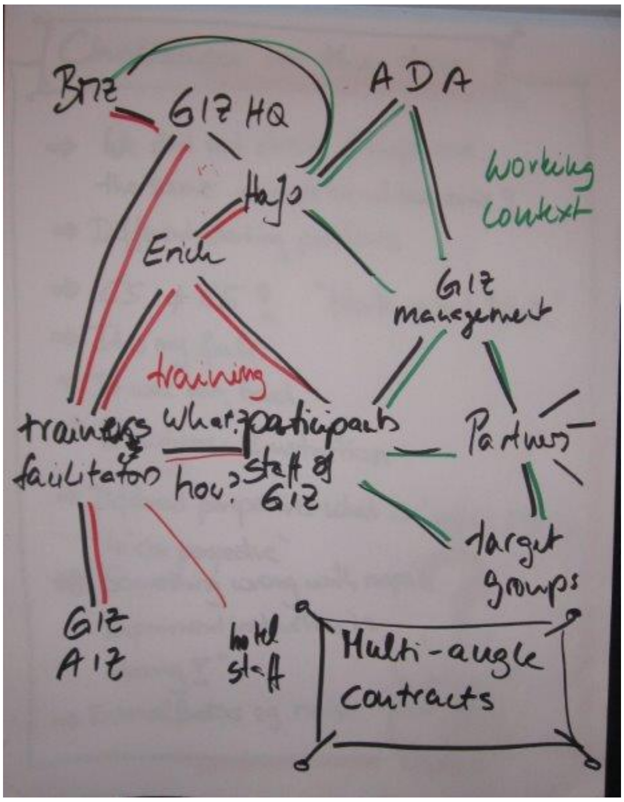
- Advisors should be solving a problem, also advisors must bring something new and render service.
- Our role is not always clear: How can we clarify our role and get a mandate?
- As GIZ we have to take into account that the partner's "memory" is not there.
- There are different views on the problem. How can we integrate very different visions/objectives?
- There is sometimes reluctance of the partner for changes. How to create awareness, ownership and understand the context better?
- Communication is not easy: How to say "no" without offending the partner?
- Time pressure of partners --> they need support NOW. The momentum and the correct moment are important so that "need" matches "offer".
- There are different cultures and realities vs. one uniform GIZ approach.
- Consider local knowledge --> GIZ should bring together knowledge.

With these theatre pieces the main questions for the training were already revealed and then further defined in the next step, the contract clarification.

3.2 Contract clarification – multi-angle contract

The **contract clarification** of the training was based on a model used in the advisory context: the triangle contract or – as often in the context of international cooperation – a multi-angle contract.

The group collected all actors which are involved in determining what would happen within the week of the team event. A lot of different actors with different perspectives were gathered. It was clearly visible: to determine what should happen in this week is not only necessary to come to an agreement between the participants and the trainer, there are also other groups involved, e.g. the GIZ headquarters, even the BMZ and the partners.



The same is true for the contract clarification between a GIZ advisor and a partner organization in the usual working context: also here the GIZ HQ, the BMZ, the target groups, Ministries and other national and local institutions etc. have to be involved.

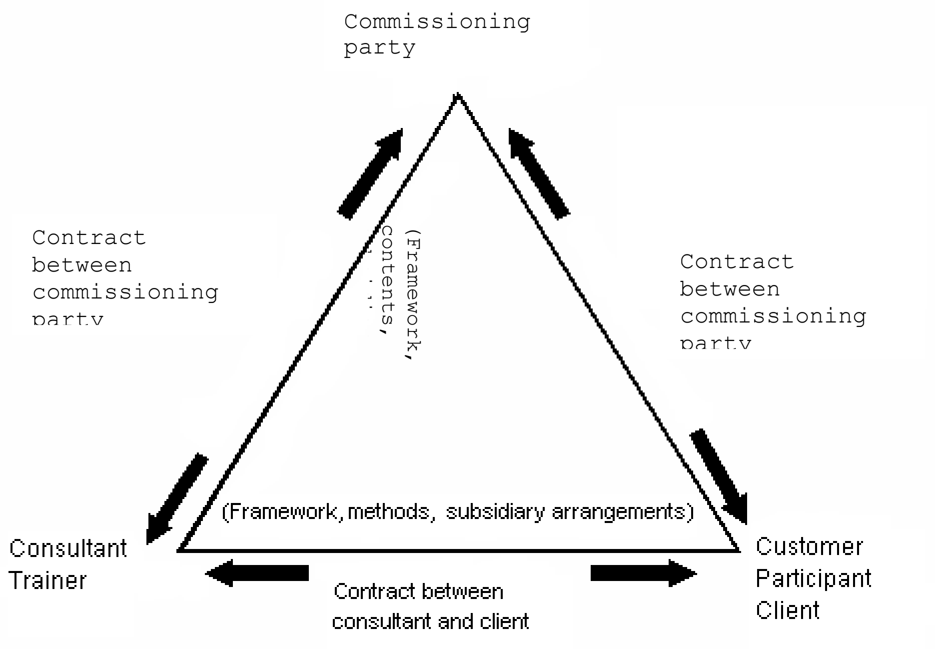
Infobox – Triangle / Multi-angle contract

When we work in and with organisations, our commissioning parties for advisor or trainer activity are often not the people whom we directly counsel or help improve their skills. It is important to conclude separate, explicit “contracts” with the various participants. Contracts here mean clear arrangements to which both side have expressly agreed. In addition, each person should know roughly what was agreed among the others.

While we negotiate the framework and the goals/results with the commissioning party during the clarification of the contract, we also clarify questions regarding methodology and content with those to whom we direct our services.

- What is the purpose of our collaboration and my services?
- Which methods do I employ?
- What do we do if irritations occur?
- How do we give feedback?

The triangle is helpful for clarification. In international cooperation, it usually becomes a polygon.

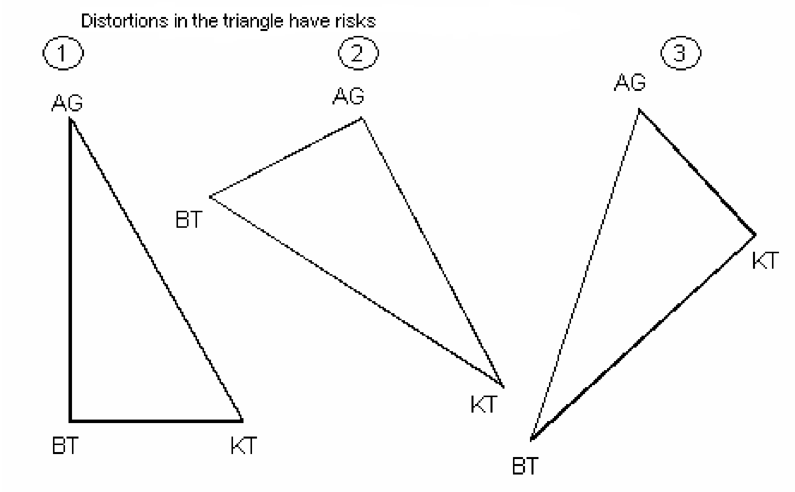


It helps in arriving at agreement regarding the existing arrangements and expectations in a targeted fashion. This clarification is an indispensable basis for target-oriented advisory actions.

Distortions in the triangle hold conflict potential. Three basic situations are to be distinguished.

1. Advisor (BT) and customer (KT) are close to one another, the commissioning party (AG) is far away.

   If the advisor is too close to the customer compared to the commissioning party, a “subversive” situation easily arises: The customers ally themselves with the advisor against the commissioning party. The latter becomes suspicious and intervenes. Instead of a change, there is a danger that power structures become hardened and control resorts to drastic measures.



2. Advisor and commissioning party are close to one another, the customers are distant.

   Here, the advisor is seen as representative of the commissioning party who is supposed to direct the customer to the commissioning party's goals. Trusting collaboration is made difficult; rejection develops in the direction of secret sabotage. The commissioning party is also unsatisfied with the results, since his/her goals cannot be achieved.

   In particular, reporting to the commissioning party, whether officially or confidentially over a drink, easily produces too much nearness. Information about individual persons should only be given if this is made known as part of the contract.

3. Customer and commissioning party are close to one another, the advisor is on the side-lines.

Here, the challenge for us as advisor is to become equally important for both commissioning party and customer. If this doesn't succeed, the service doesn't become effective and can serve as justification for the belief that advisors are actually not needed.

Source: After Fanita English and Nelly Micholt, cited in "Dreieckverträge, Unterlagen Systemische Transaktionsanalyse," Professio, 2000

In a next step and based on the understanding of the multi-angle contract we looked at the pre-defined objectives and the proposed topics presented in a mind map (the offer) in order to compare that with the demand of the participants, their learning questions and learning focus to come to an agreement as a starting point of the training (see chapter 2).
Defining these at the beginning does not mean though, that the objectives and contents will actually stay the same throughout the training or the advisory process respectively: there is a constant need for reflecting if all parties are still on the same page and if agreed aspects need adaptation to changes. Throughout this training the reflection of the learning process and also the external changes made the need for changes in the topics and the approach necessary. The same thing constantly happens in the advisory reality and challenges our project plans in our role of project managers.

3.3 Roles in international cooperation

To introduce one of the main elements of the training the range of **roles in international cooperation** between observer, process and expert advisor as well as negotiator / representative of interest was discussed very deeply and thereafter repeatedly during the workshop.

Distinguishing aspects	Process advisory	Expert advisory	Representative of interest/negotiator
Result	Improve the problem-solving ability of the client (system)	Solve the problem for the client	The interests of my institution are well defended and a win-win solution is agreed on.
Responsibility for the result	Lies with the client	Lies with the expert advisor	Responsibility with the representative of interest for achieving a result in line with the organisation's interest.
Procedure taken to achieve the result	Result is generated through interaction (co-creative process)	Expert advisor works according to the clarification of the contract independently of the client	Representative of interest negotiates with the partner.
Responsibility for the procedure	Lies with the client, proposal for process from advisor, is coordinated with client	Lies with the expert advisor	Responsibility with the representative of interest for creating a constructive atmosphere.
Expert know-how	Expert for HOW	Expert for WHAT	Expert for the interests, rules and regulations of the institution.
Examples of services	Process proposal, leading of workshops, team building mirroring, provision of tools (e.g. for diagnosis)	Conveyance of knowledge, assessment, study, concept proposal, demonstration, well-founded decision alternatives	Contracts, project proposals or implementation agreements
Tools	Clarification of the contract and the role, questioning techniques, hypothesis, feedback	Research, survey, document analysis	HARVARD negotiation principles and general communication techniques
Advisor's offer	'I offer you appropriate methodological support for the implementation of your change processes'	'I offer you a solution proposal which is tailored to your specific requirements and is state-of-the-art in terms of development'	'To be able to cooperate with my organisation you should… and we can offer you … in return, let us see how best we can do it!'
	non-directive ← ← Development of capabilities in system is of increasing importance Sustainability of the solution is of increasing importance.		**directive**

(According to Edgar Schein, Process Consultation Revisited, 1999)

The group developed the overview of the range of roles based on sets of cards. The main discussion centered around the use of the term consultant vs. advisor. The group agreed to use the term consultant and consultancy only when it comes to externally contracted consultants to GIZ. Whenever the GIZ staff is meant the term advisor is used. This is the way the term is also used in this present report, even though in international discussion the term advisor is strongly linked to the expert, whereas process and systemic work is rather linked to the term consultancy. This should be kept in mind when deepening the topic in the recommended literature.

<u>Infobox – roles in international cooperation</u>

In **expert advisory** the advisor is addressed as an expert. After an analysis phase, the advisor drafts a suitable solution based on his/her knowledge and recommends it to the advice seeker. The advice seeker is then expected to follow the advice of the expert to improve his/her position. The main tool-box here is the professional expertise.

In **process advisory** the advisory shapes the problem-solving process by enabling the advice seeker to work on the problem independently and develop his/her own solutions.

The advisor mainly pays attention to the manner in which the client handles the matter (the problem, the change task) because of prime importance is the ability to solve problems and not the problem itself. In process advisory the responsibility for the result as well as for the process remains with the client. Here the main tools for the advisor are methodical and communicative tools, such as question techniques, facilitation, designing process architecture etc.

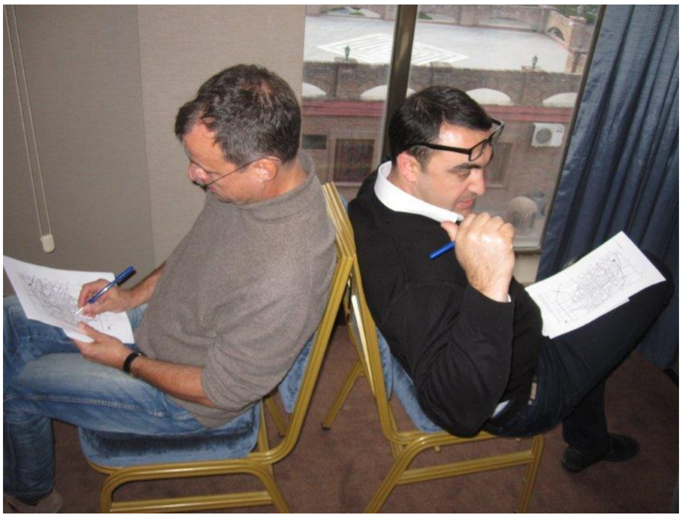
Process-oriented expert advisory the advisors control the process of problem solving by repeatedly proposing solutions for expert support of the clients. The proposed solutions can be restricted to exemplary suggestions within the framework of the problem-solving process of the clients. However, they can also be part of a combined top-down / bottom-up process in which the advisors deliver the expertise for problem solving ‘from above’ and simultaneously support the clients in adapting, adopting and implementing the proposed solution ‘from below’. The goal is to have the clients identify with the solution and advance it at the end of the advisory even without the advisors being present.

Often in their advisor role GIZ is also acting in their role as a **representative of interest**, be it in the interests of the organisation he/she represents (e.g. GIZ when it comes to negotiating with a partner) or the country’s interest (e.g. when it comes to German interests). Here a completely different set of tools is required: negotiating competencies.

(Adapted from: Slupetzky 1994, study writings of the Institut für Systemische Beratung)

3.4 Taxi experiment – constructivism in advisory

The **taxi experiment** served as a basis to raise awareness for the necessity to question one's own **perception**, and understand that everybody actually sees the world from a different perspective, even though we take for granted that we all see the same.



First all groups met strong challenges in the experiment: Both taxi driver and communication center had different perspectives of the same city, the orientation in the city (C5, north, right/left etc.) was different, emotional reactions come in, frustration of oneself ("It is my fault"), of the communication partner ("She is unable to read maps"), of the trainer ("Experiment instruction is wrong") or of the environment ("too noisy") make it difficult to develop the communication process in a fruitful way. All the expertise of the communication centre (knowledge of the street names) was useless for some groups, as they could not understand each other.

Even though these difficulties existed, some groups were able to reach their destination. How did they do it? Once small irritations came up, these groups were checking, if they had the same picture of the situation: double checking landmarks (black spot, river), clearly defining the starting point (how does it look like at the railway station) and defining thus common ground. They took a bird's eye perspective ("if you look at the city as a whole, …" instead of sticking to details "take a left turn at the third street after the roundabout") and found a common language ("What do you mean by 'left'?"). An important strategy was to define the goal or vision jointly instead of describing the way step by step in detail.

What can be learnt for the work with the partners? Advisors should always be aware that their perception of reality is only one possibility of interpreting the facts (e.g. "burning is endangering biodiversity" vs. "burning gives our cattle fresh food"). Surely the partner has a different perspective even though we often take for granted that we share one "objective reality". On that basis we should first try to understand our partner's picture.
Also, all our knowledge and ideas for solutions are always based on our understanding of reality ("Stop burning!"). Without fitting it in to our partner's picture this knowledge and these ideas risk being useless and rejected. We can make this knowledge and these ideas only useful for our partners, if we link it to their reality.

In that way the taxi experiment also has a message in relation to the difference between experts and process advisors: experts (in their pure definition) risk failing to connect their ideas to the reality of the partner, whereas process advisors (in their pure definition) do not run that risk, as they work with the reality of the partners only and refrain from bringing in their solutions.

Infobox - Constructivism

Two biologists, Francisco Varela and Humberto Maturana, have dealt intensively with the process of perception over the last few decades. Through diverse investigations they supported their theory that we humans do not see ‘reality’, but rather – only – ‘inner images’ stimulated by sensory perceptions. The human cognitive and communication system does not reproduce reality; it creates it. External stimuli participate virtually only in a stimulatory role and hence relatively little in the realities we construct inside ourselves. Internal stimuli dominate human construction of reality by a factor of about ten thousand (!).

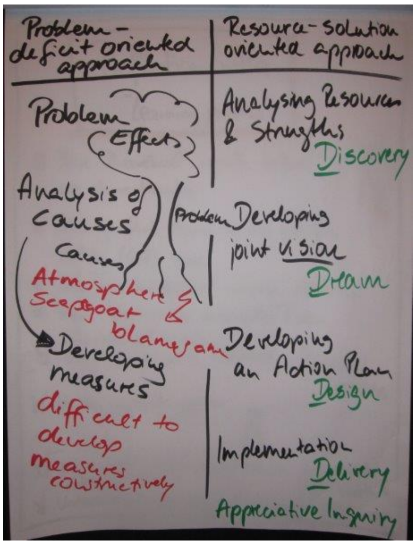
For the system ‘human’ this means that images of the ‘world out there’ are created by internal processes and not by sensory perceptions projected one-to-one internally. Reality is thereby situationally dependent and the result of a subjective construction of reality.

Thus, reality loses its claim of being generally valid. Beliefs, supposed certitudes and gained sense of security are deceiving. It can only be viewed as a subjective standpoint. Taking the place of ‘This is the way it is’ is ‘In my eyes / from my perspective / in my experience / ... it turns out to be’. The realities of people and organisations must hence be scrutinised concretely in relation to the respective situation.

Source： Humberto R. Maturana, Tree of knowledge: Biological roots of human understanding, 1992 or Jane Cull, Living Systems: An Introductory Guide to the Theories of Humberto Maturana & Francisco Varela (English Edition), 2013

3.5 Resource and solution orientation in advisory - Appreciative Inquiry (AI)

To explore the previous advisory experience of the participants the tool appreciative inquiry was introduced. Whereas classical **problem and deficit oriented approaches** take the problem as a starting point and analyze its causes to develop measures for solving the problems, the **resource and solutions oriented approaches** take the resources and strengths as a starting point.



<u>Infobox – Appreciative Inquiry</u>

Appreciative inquiry aims to probe the best in a person or in an organisation with respectful curiosity. With it, strength and courage to make a change should be generated in the person reporting about it. Then it becomes clear what this person or organisation is capable of. This approach does not examine the problems and shortcomings, but rather the potentials of a situation or person. It is especially suited to ease advisory relationships, as the client becomes aware of his/her own strengths and can draw energy from them to seek out and embark on new solution paths.
Especially in intercultural advisory it is helpful to direct attention to that, which gives the client or partner vitality, strength and courage, and to jointly probe and honour this observantly. We can distinguish two dimensions:

1. Appreciation as basic attitude of an advisor

- is an attitude of advisory that is always present. Since advisory aims at strengthening action competence, every occasion for honouring what the client recognised, initiated or did is valuable.
- Experiences and solutions already attempted are “positive junk" that should be used for new paths.
- By conveying appreciation and honour, the advisor reduces a possible subjectively felt gap in competence.

2. Appreciative inquiry as concept for change

- The envisaged change process in appreciative inquiry takes the following steps:
    - Discovery of strengths and resources through questions and following stories
    - Dream: developing jointly a vision of the future cooperation
    - Design of the process to reach the vision by planning concrete realistic steps
    - Delivery by implementing the design.

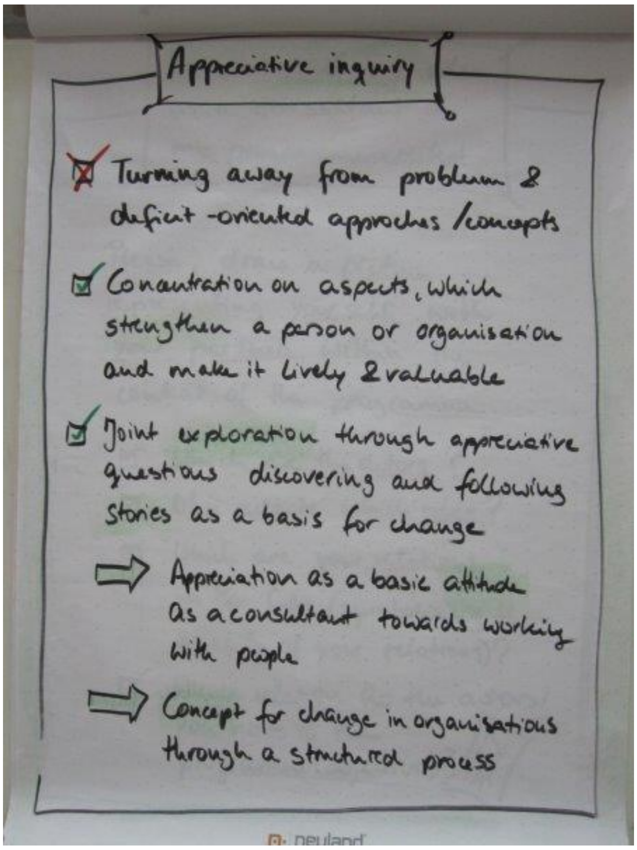
Source: David Cooperrider and Diana Whitney, The Appreciative Inquiry Handbook: For Leaders of Change, 2008

Concentrating on resources and strengths instead of problems or deficits helps to enhance an open atmosphere and gives the advisor as well as the partner hints on which resources to use to develop further solutions.

For the participants it appeared as an interesting possibility to avoid “blame games” which are experienced during the analysis of causes of a given problem within the classical approach. Additionally, following lessons were drawn from the application of the first phase of AI:

- More interest is created and more questions are coming automatically,
- The appreciative approach evokes more curiosity and creates an open atmosphere where things can be discussed more easily.
- Learning from each other can take place, also the advisor can learn from the partner.
- The guiding questions of AI help to get started and tune in.

Appreciative inquiry can be used as a tool whenever an initial phase of building a new relation toward a counterpart is designed. It will help to establish a stable relationship and produce useful information for the next steps. It is also helpful in designing a longer cooperation process with various partners, which might not be very open for one or more of the partners. In its basic meaning appreciation as an attitude is an indispensable part of all resource and solution oriented approaches and systemic advisory as a whole.



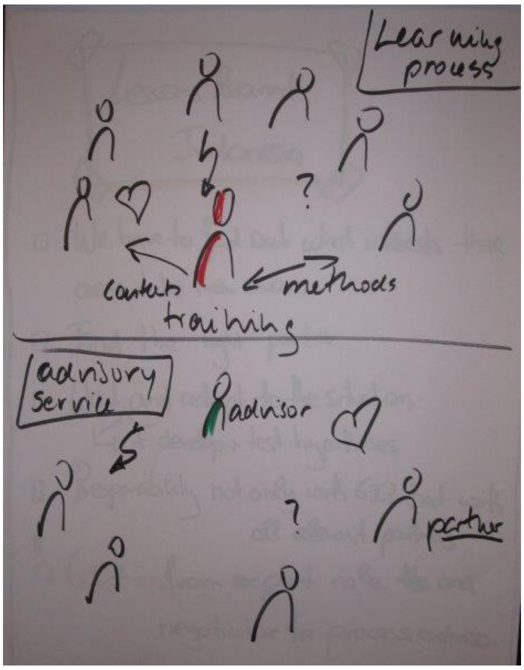
The appreciative interview of previous experiences revealed the **basic success factors** for advisory. In this group the awareness was very strong that the success of a advisory service does not only depend on good expertise but strongly depends on the relation building aspect: involving the partner from the start, joint planning and reflection, perseverance on the side of the advisor, trust building, active listening and communicating as well as flexibility of the advisor and understanding the interests of the partner.

Additionally, one of the main success factors for advisory processes is regular reflection of the steps taken together with the partners. In the following chapter this was applied to the learning process within the training.

3.6 Reflection of the process – in the training and advisory context

After taking the first steps together in the training, a reflection of the learning process was initiated to see what was useful up to now and what could be improved to make best use of the time to come. The participants were asked to evaluate the learning process by showing a number of fingers between 0 and 10 (the latter being the best). Most results were ranging between 4 and 7. Ideas were collected to enhance the learning process with each other:

- More theoretical inputs before sharing thoughts
- Stronger link to topics of the specific GIZ reality
- Considering different advisory situations
- More “real” case examples (also international cases)
- Give more orientation to see when the requested topics will be discussed, and to understand the whole learning process



The reflection was seen as productive as “hidden issues appeared”. This makes generally a reflection indispensable in training as well as in advisory, especially when dealing with a multitude of partners. Therefore in a second step the reflection of the learning process was also transferred to the reality of the advisors in the IBiS programme.

As a consequence of the reflection the approach of putting together the programme day by day on the basis of the previous steps and results was changed presenting now the overview of the week - knowing that the programme will be adapted day by day.

3.7 Systemic perspective in advisory - Elements of social systems and their visualization

Also as a consequence to the reflections, the introduction to the system picture was changed: instead of using an example of the Georgian forestry reality in Capacity Development an international example was chosen illustrating at the same time the different roles of GIZ in Indonesia (process advisors, experts and negotiator) as well as the elements of a system in a visualized picture.

The case is presented here in summary first, in order to build the systemic idea on it.

The Indonesian case gave an example of a GIZ programme following their first objective agreed on with the Ministry of Environment to “Create and independent Indonesian Cleaner Production Centre, ICPC”. Involved GIZ and external **experts** had developed proposals for solutions, e.g. referring to specific organizational forms or services offered by the ICPC. However, GIZ had a lot of difficulties implementing the idea as the Ministry was “blocking” the necessary decisions. In that situation GIZ was rather **negotiating** in order to convince the Ministry of the benefits of their solutions, driven also by the wish to go on in their project plan. Only after involving more and relevant stakeholders the full picture of the situation became visible and solutions for the situation evolved. This **process was facilitated by GIZ** even though the solutions were not created (only) by GIZ.

Lessons learnt from the Indonesian case were:

- We have to find out what interests the partners have, and take them seriously
- Find the relevant partners, and involve them actively
- Wait, develop and test hypotheses and adapt the activities to the situation (as in process advisory instead of expert or negotiator role)
- The responsibility is not only with GIZ but also with other stakeholders
- GIZ role comprised the expert role, to negotiator and process advisor role
- Advisors should not take the decision or stick to a solution (“we know, what is best for you”), but facilitate a “solution-finding-process”
- Top decision makers are important ->find right approach for building up good relationship with him/her.
- Be aware of risk that agreements are only reached, because GIZ brings in money.
- Analyze the system before you start.

Entering further into the terminology of the systemic model we took the picture of the Indonesian case as an example of a social system to analyze how systems can be described in a helpful way for systemic advisory. The participants came up with a set of elements starting from the actors (persons or organizations) in the field, the key actors between them, their objectives and interests, perceptions and relations, their culture, conflicts and history etc. In the following info box the elements are put into the context of the system model.

Info box: System model – elements of social systems

In order to be able to act in the direction of change, we must first understand what determines the actions of social systems – people and organisations. The systemic model helps to understand the entry points for change.

The systemic model arose out of the experience that complex questions and changes could not be processed on the basis of linear models (cause–effect as are seen in technical systems such as machines).

A basic assumption of the system model is that complex problems cannot be solved if one pays attention to one element (e.g. a person in the partner organization), but rather that one must consider the entire system.

A system consists of various parts connected to each other with a certain structure, which means that they are situated in relation to or as substitutes for one another. The system as a whole behaves differently than its individual parts do; the whole is more than the sum of its parts or sub-systems. A system is always only recognisable when it can be distinguished from its environment.

No living beings (mental or social systems) exist for themselves alone; they are all connected with other systems.

A person behaves differently in the various systems to which he/she belongs. Thus, for instance, a person behaves differently when making decisions as a father than as a director of a club.

A social system can be viewed as a system of acting individuals whose respective images of reality determine their actions (also see in Constructivism).

Functional elements of social systems are:

- system environment – system boundaries
- sub-systems – system elements
- relationships – interactions.

The actions of social systems are determined by:

- subjective interpretations (individual images of reality)
- context
- rules (official and informal)
- transaction patterns (habits).

Potentially all these elements are entry points for change.

Source: Sonja Radatz, Beratung ohne Ratschlag (Consultancy without advice), 2003

In order to get to know each other's point of view within the advisory system as well as when it comes to getting to know the partner's point of view, system pictures help to come to a common view of a situation. Visualization helps to understand the different **elements of the system** and their relations with each other and their environment.

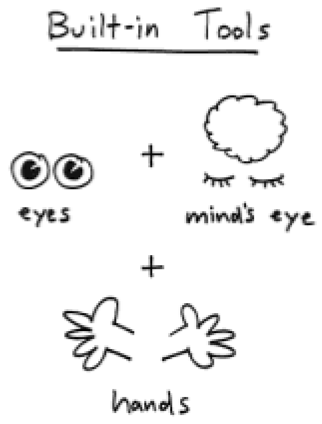
Therefore the participants developed system pictures for their work contexts. Apart from looking at different techniques of visualization the group also discussed the **function of visualization** for the advisory work:

- Visualization helps to get different perspectives – zoom out
- Use cards to keep it flexible and integrate changes which occur in the communication
- Easier to understand others' point of view and perspective of reality
- Using symbols to be able to get a message across in a different way than with words / easier quicker
- The picture is automatically a shared documentation of a discussion
- The discussion process and the cooperation can be more fun and more emotional
- The visualization could hamper the process, because it might take too much time, so we need to explain the frame well ("Why do we do it?") and be aware that investing time to create a common picture might reduce the time lost in confusion and misunderstandings later.

Infobox: Some hints for visualization

Visualization helps to more quickly look at situations/ problems, more intuitively understand them, more confidently develop solutions for them and more rapidly convey them.

Visualization in advisory means taking advantage of our innate ability to see – both with our eye and with our mind's eye – in order to discover ideas that are otherwise invisible, develop and share these both quickly and intuitively with other people.



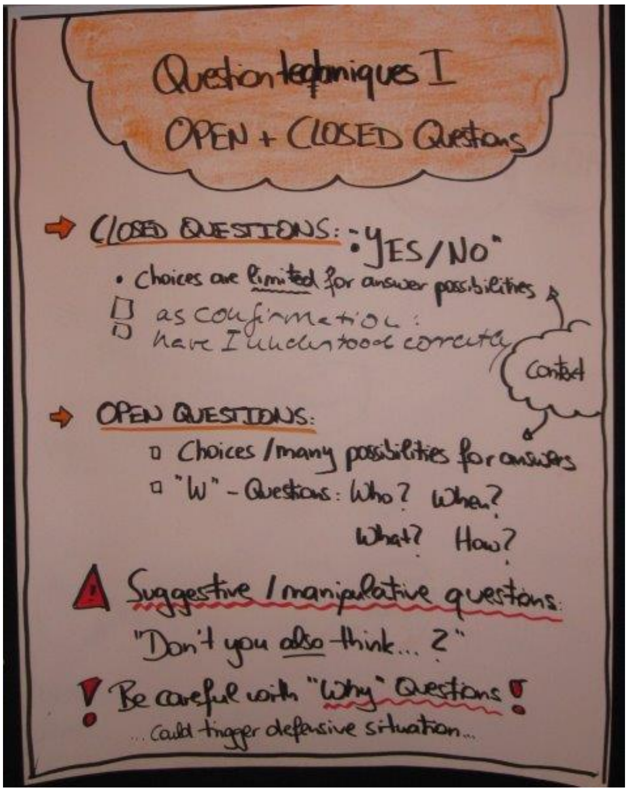
This info box could easily include the most complicated techniques of visualization. However, the most important requirements are shown in the visual itself: our eyes, our mind's eye and our hands. Furthermore, for a talk between few people, a pen and a napkin might do. Just doing it makes the difference.

For more detailed ideas and refine techniques, please consult:
Series of BIKABLO books, www.bikablo.com or
Dan Roam, The back of the Napkin: Solving problems and selling ideas with pictures, 2008

3.8 Tools in advisory - Question techniques

To further complete the toolbox of an advisor **question techniques** were introduced: open and closed questions as well as systemic questions. Various exercises helped to understand the dynamics and impact as well as the functions of the different question techniques**.**

At first sight it seems so easy to **differentiate open from closed questions**. While closed questions request a YES or a NO for an answer, open questions always start with an interrogative, e.g. Who? When? What? How? etc. and always open the room for different answers. That is the technical level.
A small exercise of going left or right to judge the character of each question showed that it is not so easy to differentiate questions after all: Even technically open questions can be perceived as closed, when they focus the attention of the client/ partner or limit the choice of answers or suggest a preference for an answer, e.g. What do you prefer, option x or y?. Also the tone of voice can turn a technically open question into a suggestive question, e.g <u>Why</u> did you not bring all the team with you?.

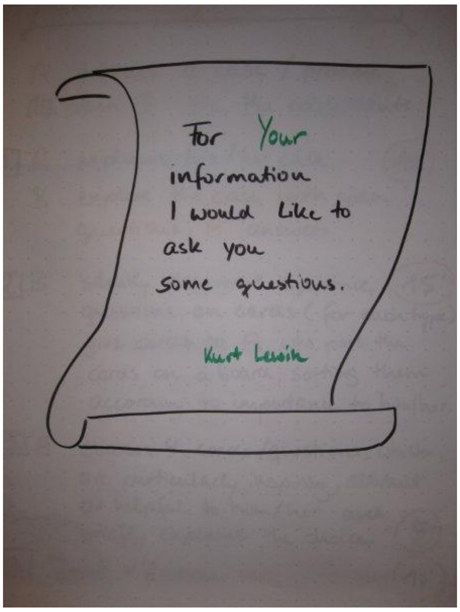


What is important for advisors in this topic?
Generally speaking advisors should be aware which kind of questions they put, as they have different impacts to the contents of the answers and the relation to the client/ partner.

Closed questions are important for advisors when it comes to asking for confirmation, clarifying aspects and paraphrasing. Advisors should pay attention, when asking closed questions as there is a higher probability of answering with a YES than a NO, just for keeping a good relationship, even though it does not reflect the opinion of the client. Also, closed questions can be easily manipulative and then the answers are not worth much (e.g. don't you also think that x is important?).

Open questions which are asked in a truly open and curious atmosphere inspire the client partner to develop their own perceptions, opinions or solutions and thus give more ownership and responsibility to the partners.

Infobox - Question techniques



In advisory situations, we always have two tasks: On the one hand, we have to quickly get an impression of what it is about to our counterpart and how he/she interprets the situation (“For MY information I would like to ask you some questions”). On the other hand, we want to help him/her gain new knowledge through our advisory service and on this basis to develop sustainable solutions (as in “For YOUR information I would like to ask you some questions” Kurt Lewin. Questions are equally useful for both tasks.

The basic attitude of the joint process of exploration is appreciative. Here, we don’t use questions primarily to learn something ourselves. Rather, it is a matter of making someone aware of interpretations, checking the “possibility of being otherwise” and trying out new perspectives. Advisory is thus understood as an information-creating process.

The questioning should always have been announced and clearly “allowed” in the sense of, “I would like to ask some questions. Would that be alright with you?” Questions about interpretation and perceptions have proven to be valuable especially in exploration of cultural particularities. But they are to be asked with sufficient discretion.

Questions are helpful in all phases of an advisory meeting (see Chapter on phases of an advisory process). What is decisive is that we avoid questions suggestive of an interrogation and instead explicitly direct our attention to what is successful and helpful for a solution. Valuations and questions that lead to polarities in the sense of good/bad, normal/abnormal, etc., are always to be avoided.

Questions are also suitable for bringing one’s own ideas for a solution, such as through hypothetical questions: “Assuming that you would suggest including only 7 villages instead of 15 in the pilot phase, what would be the obstacle to that?”

Questions need time to take effect, if they trigger new thought processes. Patience and calmness are useful here. Keeping quiet often means that important things are happening in the head of the conversational partner. Several questions strung together are less helpful.

Especially in the exercise on systemic questions it was interesting to see how formulating questions in view of a specific problem of our colleague can help that colleague to come closer to a solution: all of the participants who gave cases for the exercise progressed in being able to deal with the problems they had. The lessons learnt were:

- Not only ready-made solutions suggested by an expert advisor help, systemic questions help a non-expert advisor to bring in the external view.
- They help the counterpart to change perspective.
- A combination of different questions helps to diversify perspectives.
- Writing down the questions helps for future preparation.
- Formulating the questions also helps the advisor to change perspective.

Systemic Questions

Question type	Usefulness	Example
Questions about the context	give information about data / facts of the situation	"How many employees does your project group have?" "How often do you meet?" "Who participates in the meetings?"
Questions requiring a distinction to be made	for making vague statements precise to make differences in the way things are viewed clear	"For whom is it a bigger problem?" "On a scale of 0 to 100, how big...?" "How does your co-worker's opinion differ from yours?"
Hypothetical questions	provisionally thinking outside the box jointly examining possible consequences	"Assuming that..." "Let's suppose that you..., what would be the result?" "If you wanted to separate advisory and controlling function, how would that be possible?"
Questions about the future	open one's eyes to the future	"What expectations do you have for the time after this problem has been overcome?" "Where do you want to be in 2 years?"
Circular questions	change the point of view, bring in other valuations	"What does your colleague think when you …?" "What would your director suggest as a solution?" "If your team leader were here, what would his/her attitude be?"
Questions about behaviour	allow the real processes behind valuations to be understood promote a differentiated view and make reframing possible make clear one's own stake in situations	"What exactly does Mr. Müller mean when he …?" "What steps do you introduce in order to…?" "How exactly do you react when the team…?"
Gossip questions	allow unproven information to be expressed Caution: use inter-culturally only with great discretion.	"What do people say about it in the shop floor?" "Since at the moment nobody knows anything definite, what are the rumours?" "What's the word on the street?"
Questions about subjective interpretation	allow the inner map to be explored question the meaning assigned to an event	"If you were to do that, what advantage/disadvantage for you could arise from it?" "What meaning does that have for you?" "What makes you angry about it?"

3.9 Phases in the advisory process

The **phases of an advisory process** give orientation for planning and implementing an advisory situation. After having gained awareness for the attitude of a process advisor (e.g. appreciation, inspiring the partner to develop their solutions) and some important techniques of a process advisor (visualization and question techniques), the phases of the process allow to bring all inputs together in an application.

1. Contact	Create a relaxed atmosphere for the conversation
	Pay attention to key words, using the same yourself, convey appreciation (for the culture, the country, the people etc.)
	Convey empathy, understanding, interest, appreciation
2. Orientation	Get an overview of the situation, giving time, to understand the subject within its context, "wandering within the map of the client"
3. Clarification / Contracting	What is the objective of the client/ the result desired by him?
	Clarify the client expectations concerning the advisor
	Pinpoint the client’s expectations jointly and compare them with own possibilities (What can I do? What may I do? What do I want to do?
	Agree on objectives, method, and dealing with disturbances
4. Exploration and Change	Questions for data, perceptions, timing and rules, normal and disturbed situations, future
	Explore solutions which have been tried already and convey appreciation
	Analyse jointly solutions of others and even those appearing unrealistic at first sight
	Bring in your own ideas for solutions as proposals (e.g. through hypothetical questions)
5.Conclusion	Ask for insights and decisions
	Agree on further work on the topic if necessary
	Look back on the conversation jointly, evaluate the process and ask for feedback

Infobox - Phases of an advisory process

The division of advisory processes into phases has proven to make it easier to maintain an overview of the process. The phases in a advisory process are generally oriented towards the basic pattern of every change process. This basic pattern consists of three sub-processes: **unfreezing**, **moving** and **refreezing**.

Unfreezing, as a basis and prerequisite, takes on special importance for the further change process (the course for the further process is set with this), the first three phases serve primarily towards unfreezing. Focus is on change in the fourth phase and the fifth phase is first and foremost aimed at the reestablishment of stability.

In the following complex exercise each participant was going through all the phases during one conversation applying question techniques in the role of the advisor, in the role of the client and in the role of an observer giving feedback.

Here are a few conclusions and lessons learnt on advisory the group developed after the application:

- The crucial part within the phases is the clarification of the contract.
- It is important to clarify the expectations of the client well.
- You should never skip the contact part, even if you know the partner well.
- It is important to prepare time keeping, and structure of the conversation.
- Inspire the client with questions and identify your objective well before asking a question!
- With questions advisors can lead to solutions, even though formulating systemic questions is not “natural” and needs practice.
- Do not stress you client and be dominant, i.e. structure the discussion, but do not push in a direction. Also emotion of the advisor can influence / redirect a conversation.
- It is difficult to follow the process if one knows the person or topic very well, it then is more difficult to refrain from giving solutions and motivate the partner to develop their own instead. Distance is an asset!

- At the same time it is difficult sometimes to separate the process advisor from an expert, sometimes both roles are required in the same situation and the good combination makes it successful.

Generally speaking it was perceived as helpful to experience the different roles, advisor, client and observer, especially the observer might see aspects which are not seen by the advisor or the client.

3.10 Systemic advisory approach - summary

This complex exercise already showed the main aspects of a process advisory approach. To sum up the previous elements of the training, an overview was shown of the systemic approach to advisory:

Infobox – systemic advisory

The term "systemic" has been used in advisory since the 1980s in the context of organisational development, team development and coaching. In the 1990s it became very widespread as an effective approach. Systemic advisory is not a permanently fixed floor plan consisting of concepts and methods, but rather an advisory approach based on certain basic assumptions and taking from a repertoire of methods originating from diverse sources and also used in other advisory approaches.

Systemic advisory has its roots in ecology, in system theory and in constructivism.

Systemic advisory uses some central ideas from the repertoire of *system theory*. For example, systems develop their own laws and orient themselves in their actions towards their own creation of meaning. The reciprocal relationships between the system elements are strong and sustain the overall system. They reinforce each other through continuous interactions (feedback).

For advisory processes this means:

→ systems can be influenced, but not controlled, by advisory interventions

→ we need to pay attention to the interactions.

Constructivism is based on the central idea that there is no 'SINGLE reality', but rather that each person creates his or her own realities according to his or her perceptions and conceptions of reality. Construction of reality is understood as a human accomplishment; we constantly repeat it. Scientific investigations in the field of cognitive biology reinforce this theory (see the following page). Our actions are oriented towards the conception we have of the world, a situation, the person in front of us. These conceptions are mutable, but, however, frequently based on basic assumptions and cognitive patterns which we are totally unaware of. Organisations as systems also develop common conceptions.

For advising this means:

→ the manner of viewing and organising reality is an expression of the view of the world and the way of life of a system

→ changes in behaviour are based on changes in conceptions of reality

→ conceptions of reality of our clients are based on basic assumptions and cognitive patterns

→ through questions we research the (for the most part) subconscious basic assumptions and cognitive patterns with our client so that the client can change them.

In view of its application, systemic advisory has its roots primarily in family therapy. In the 1950s a shift from addressing people as individuals to addressing them in their social contexts, i.e. their family systems, occurred. Behind this was the realisation that human behaviour is always context-dependent, i.e. is always influenced by other people, not merely by personality. The image of the mobile symbolises this:

Various elements are linked to each other in a mobile. If one element moves, the others are also set in motion.

For advisory this means:

→ we cannot change a single element in an isolated manner without there being consequences for the overall system and

→ the current behaviour of an element is codetermined by the system.

Furthermore, the family therapists found out that their own view of a problem played a role. If they viewed a child's problematic behaviour, e.g. bed-wetting or bulimia, as being related to the child, they only had the problem in sight. If the problem was looked at in relation to the family, a benefit for the family system as a whole came into view. The bed-wetting child, e.g., ensures that there is communication and cohesion in the family, which would not be the case without the 'problem'.

For advisory this means:

→ human behaviour is – unconsciously or consciously – always aligned to providing meaning, and this (personal) meaning should be researched

→ the current behaviour of an element fulfils a purpose even if it appears to be dysfunctional at first glance

→ the benefit should be recognised and honoured so that it can be replaced by more profitable services in the system.

Source: Sonja Radatz: Beratung ohne Ratschlag (Consultancy without advice), 2003

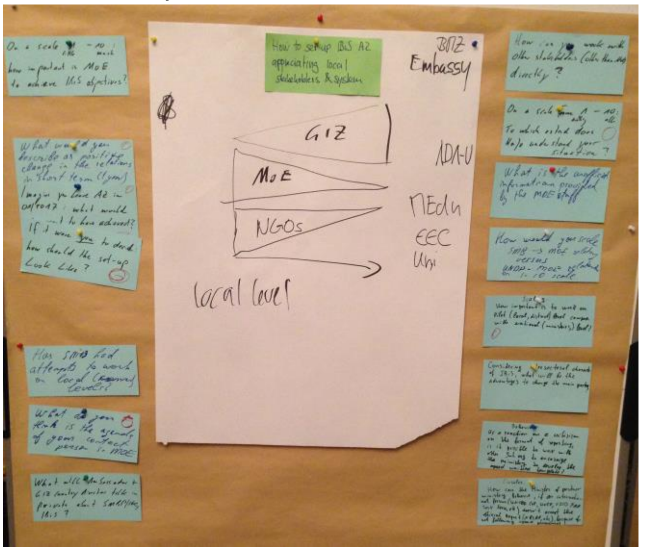
3.11 Difficult situations in advisory

During the training there were already a lot of opportunities to receive inspiration from colleagues. At this stage the group looked at different topics which had still not been covered. Some were chosen as topics for peer coaching, others were chosen to deal with directly in the session on “difficult situations in advisory”. In the following, these situations and their respective strategies are documented:

Case no. 1 “How to setup IBiS AZ appreciating local stakeholders and system?”

In order to help the owner of the case the group collected questions asking themselves: Which is an interesting question for the owner of the case to reflect on? The owner of the case selected the following questions being the most helpful ones:

- What would you describe as positive change in the relations in short term (1year)?
- Imagine you leave AZ in 01/2017: What would you want to have achieved?
- If it were you to decide: How should the set-up look like?
- What do you think is the agenda of your contact person in MoE?
- On a scale from 1 (little) to 10 (all): To which extent does HaJo understand your situation?
- How important is it to work on pilot (local, district) level, compared with national (ministries) level?



Case 2: How to increase interest and involvement of the partners in Azerbaijan towards IBiS?

- Adjust objective
- Look for other partners
- Involve new players
- More clearly communicate your intended impact/ vision / results
- Very detailed agreed activity plans with assigned responsibilities
- Constant communication/ information
- Establishing trust / good relationship
- Create formalized working group / steering groups
- Constant reassessment of expectations
- Create short / mid-term success stories (piloting)
- Synchronize objectives with partners’ strategies and action plans, annual action plans
- Appreciate formal/ informal multi-angle contract of partners
- Make clear contributed resources from both sides

Case 3: How to deal with conflicts within/ between partners in Dedoplistskaro region?

- Long orientation phase understanding history and present situation of a conflict
- Selected partners that are more neutral to the issue
- Look for a partner who could be a mediator
- Try to find common interest
- Change the pilot area
- Make your position and strategy clear to partners
- Separately cooperating with each of the conflicting partners
- Take partners to a neutral environment to start dealing with each other

3.12 Peer coaching

An important tool within the GIZ context and also for the partners is “peer coaching”. It is used within GIZ for colleagues at the same hierarchical level to advise each other on their day-to-day strategic issues. It structures a group process to focus the inputs of all members of the group to develop solutions for a specific case of one of the group members in a very short time. GIZ just as also other companies uses the tool to encourage cooperation among colleagues between different programmes or within a programme, within a country or across country borders. It might also be used for partner organizations, e.g. in organisations of agricultural extension services.

Peer coaching can have many positive effects. For one thing, the participants bringing their issues/ problems in receive concrete support in shaping situations which are difficult for them. For another thing, the individual group members expand their advisory competence as they practice advisory regularly and receive feedback on their services. The group members increase their perceptions and action repertoires, among other things. Finally, the mutual advisory within a group helps to build trust and strengthens the group.

Infobox - Guide to peer coaching

Suitable for groups of 3–8 people (1 client and x advisors)

Time required: 50 minutes

Roles: 1 case owner, 1 timekeeper, 1 visualiser, 1 ‘guardian of the rules’, x advisors

	Step	**Minutes**
1	Client briefly describes the matter.	**3**
2	The group poses questions regarding the context, the view of the problem, the background etc.	**10**
3	The group develops hypotheses (= assumptions) about the matter and the situation of the client (‘What’s going on here?’). The hypotheses are not discussed or evaluated. All hypotheses are visualised. The client sits in and only listens (like in front of the television).	**10**
4	The client reacts to the hypotheses and says which ones are particularly appealing, selecting 1 or 2.	**3**
5	Using the hypotheses selected by the client, the group formulates ideas on the further course of action and possible problem-solving approaches.	**10**
6	The client reacts to the solution ideas and says which ones are particularly appealing as well as what he/she believes the further course of action should be.	**5**
7	The exercise is evaluated at the meta level (reflection of the process for ‘advising–learning’; watch out that you don’t slip back into the contents here).	**10**

Within the teamevent peer coaching was applied to 4 cases:
Group 1 was with Aydin Inciyev's question: "How to increase the interest of MENR to have a strong NBMS in place?"
Group 2 Olga Weigel worked on the conflict between different programme partners in Dedoplistskaro.
Group 3 worked on environmental education in Georgia (Giorgi Lebanidze).
Group 4 supported Natia Kobakhidze in her questions concerning "Mainstreaming Biodiversity on the local level in Kakheti".

Group 1 was with Aydins question: "How to increase the interest of MENR to have a strong NBMS in place?"
From the collection of hypothesis Aydin chose two:

- GIZ team does not know how to go about the "atmosphere of fear" in MENR
- Lack of communication with Minister (MoENR)

On the basis of these hypotheses the following solutions were developed:

- Arrange monthly meetings with the MENR
- After 1 official contact create informal relations (GIZ team)
- Get "ok" from Embassy to meet Minister-GIZ informally/ formally without Embassy
- Just meet the minister
- Use the upcoming big event as a chance to meet the Minister in a more relaxed atmosphere and talk about this issue (even to arrange a meeting)
- Update the report 2015
- To initiate a team meeting to understand better functions and other issues regarding NBMS
- Big name in the negotiation
- Make an interesting proposal for the minister in connection with NBMS
- Involve a respectable 3rd party in the first meeting with the Minister – this way he may reveal higher level of responsibility

Group 2 Olga worked on the conflict between different programme partners in Dedoplistskaro.
The hypotheses chosen were:

- Maybe there is a hidden agenda for some of the groups/ maybe something more serious is behind the conflict
- Former association has strong influence and threatens weaker ruling party

On the basis of these hypotheses the following solutions were developed:

- Appreciate the conflict and design programme accordingly
- Assess conditions for cooperation with conflicting partners
- Don't stand in between of conflicting parties
- Bring in neutral mediating stakeholder (GIZ local staff)
- Relax
- Try to diversify other partners

Group 3 worked on the environmental education (Giorgi Lebanidze).
Giorgi chose the following two hypotheses from the set of eight:

- Maybe the schools can have a more important role in the process
- Maybe a private company could take over the implementation

On that basis the following solutions were developed:

- Secondary schools cooperate with universities in providing material involving students i.e. private universities, voluntary work
- Secondary schools demand all material free of charge from the MoEdu
- Private companies find the material of the course in order to improve reputation /advertising => greener image

Group 4 supported Natia in her questions concerning “Mainstreaming Biodiversity on the local level in Kakheti”.

The hypothesis chosen were:

- Communities may see biodiversity conservation as an obstacle for economic development
- Lack of capacities to consider biodiversity

The solutions developed by the group were the following:

- Implement small pilots including value chains or alternative income sources
- Assessment of capacities and needs
- Economic benefit analysis of previous pilots and share lessons learnt
- Careful selection of partners on local level
- Involve all relevant stakeholders in the planning of activities
- Public awareness raising campaign adapted to region => tailor PAR measures to different target groups *
- HCD measures: study tours, trainings etc. => decision makers ***
- Advise regional governors on institutional development => situation analysis and development plan ***

At the end of the experiential phase, an evaluation of the tool was done.
The owners of the cases said:

- Ideas were helpful, worth considering in the future.
- There were lots of ideas for solutions and hypothesis from different perspectives.

- Solutions were felt as being reassuring.
- Being quiet is challenging and also interesting!
- Also the time pressure was felt: one "client" felt he/she could not fully explain the case and thus the solutions were not so interesting and new.

Other conclusions were:

- It was good to have a facilitator who takes care of the method and keeps the group on track.
- Group discipline is a success factor.
- Also the attitude an openness of the client, who gave the case, is important.
- The tool offers the opportunity to practice asking precise questions to get into a new situation quickly (as in real life also there is time pressure!).
- Sometimes it is hard to stay in the sequence (e.g. when wanting to ask a context question later, it might be a good way to put it into a hypothesis instead).
- Time limit forced the group to stay on the right way and helps to concentrate on the issue, even though some felt to short time slots as a problem.

Info box: Peer coaching II

Peer coaching is characterised by the fact that the peer group is made up of equals and follows a structured process. Its core elements are: initial description of the case and the problem or question by the participant bringing his/her problem up followed by questions posed by the advisor to explore the situation and then hypothesis formation and formulation of possible solutions by the advisors. Important in terms of methodology is the strict separation of hypotheses (what's probably going on there?) and proposed solutions (what can the issue holder do?) as with it the common reaction to problem descriptions, namely provision of advice, is quelled. In this way the participant bringing his/her problem in gets the chance to view his/her situation from other angles. In connection with the 'intervention ban' imposed on that participant during hypothesis formation and gathering of proposed solutions (these phases are followed by that participant as if they were on television), this approach makes it easier for the participant bringing his/her case in to maintain a distance between him-/herself and the situations he/she is involved in. In this way he/she can look on him-/herself and the others involved in the problem from a 'bird's eye view'.

Additionally, this strong structure avoids that the group deviates in discussions of individual proposals. These discussions actually do not make much sense as the only person being able to judge, if a proposal is valid or not, is the participant bringing in the case.

Peer coaching can be applied in many contexts in the GIZ. A number of groups exist in the Head office and in the countries, stemming from trainings, sharing therefore a common topic, sharing the same country or the same programme approach. The groups are stable in composition due to the need of confidence and most meet monthly.

A new approach within GIZ also promotes it as a virtual tool on the Global Campus 21, where it can be applied with groups in two versions, one version where the group is working at one case in parallel, another version, where the group can work on a case based on the individual's available time slots.

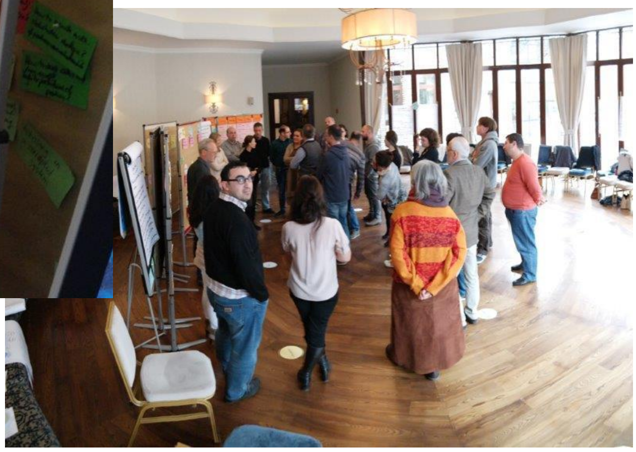
For further information of Peer coaching as a virtual tool within GIZ Global Campus 21, please contact Santiago Amaya: Santiago.Amaya@giz.de

3.13 9-role-model and positioning

The 9-role-model is yet another way of approaching the topic of advisory roles from a different angle. Here, a choice of 9 roles is given in a grid which is allocated following two axes: the responsibility for the outcome/result and the responsibility for the growth of the partner (organization) (Cf. Douglas Champion: Choosing a Consulting Role, 1990).

The roles discussed in the opening chapter 3.3 can also be found in this grid, enriched with more perspectives. While the less directive process advisor would be comparable in this scheme with the counselor or facilitator, the expert would be covered by the technical advisor and the negotiator (if at all) might be comparable with the partner. It is interesting to see the coherence of the models when it comes to the dimension of the responsibility with project results: the more responsibility an advisor has for project results, the more directive the intervention will be. The responsibility for client growth presents an interesting difference: it is clear that the expert/technical advisor has least of that responsibility and the process advisor/ counselor most of this responsibility. Whereas in the 9 role model the partner role also carries a lot of responsibility for client growth, the negotiator role in the model of Edgar Schein is not seen to give much weight to the development of the capabilities in the system.

After the presentation of the role model the participants of the workshop positioned themselves taking the perspectives of their own identity, and the expectations of their partners.



3.14 Role plays

In this advisory exercise realistic situations reflecting real challenges were enacted. With the help of the observers, the groups were able to reflect on the dynamics of communication and strategy.

The first case dealt with the staff training measure for the Environmental Education Centres. While the partner wanted to concentrate on the capital and make the EEC a model for the rest of the country, the GIZ strategy was building on training one member of each EEC to multiply in their respective EECs.
In the second case, the representative of the Ministry of Environment wants to convince the GIZ representative to talk to the Ministry of Agriculture whereas the GIZ advisor prefers the Minister of Environment to talk to the Ministry of Agriculture directly.

Both situations were enacted by various teams in parallel. The advisors had the challenging task to prepare their roles (process advisor, expert or just negotiating your interests?) and define their strategies.

At the end the groups drew the following conclusions from the learning experience for their advisory task in reality:

- The attempt to persuade the partner risks leading to resistance.
- Preparation of a meeting with the counterpart is essential. Consider resources, esp. time.
- (Written) documentation of the meeting could support that all sides keep their promises.
- Defining joint vision / goal: explore the vision/ goal of the partner at the beginning and then bring in GIZ experience.
- Compromise without losing “track” of own objective.
- GIZ : explain principles, e.g. why you consider gender balance important.
- Advisor should first set frame, e.g. on what basis / former decisions are we building our meeting?
- Maintain (mental) flexibility to explore new ways, new ideas to explore with your partner => don’t get locked in.
- GIZ advisor needs to get/negotiate the mandate to show / have flexible solutions and “power to compromise”.
- GIZ should make transparent what is possible and what is not.
- Exploring ideas with partner does not necessarily mean deciding already on one solution.
- Instead “playing” with different options is important.
- GIZ advisors have to be flexible to switch between different roles.

Also, it was interesting to see how different people interpreted the same situation in very different ways.

4 Evaluation of the team event

The evaluation of the event followed four questions:

- Which are the most important aspects of the training for you?
- Which are your concrete ideas to apply aspects of the training in you daily work?
- Where is the link of this training to GIZs concept of capacity development?
- On which issues/ topics/ open questions do you want to continue your learning process and how?

In the following the answers to the four questions are documented:

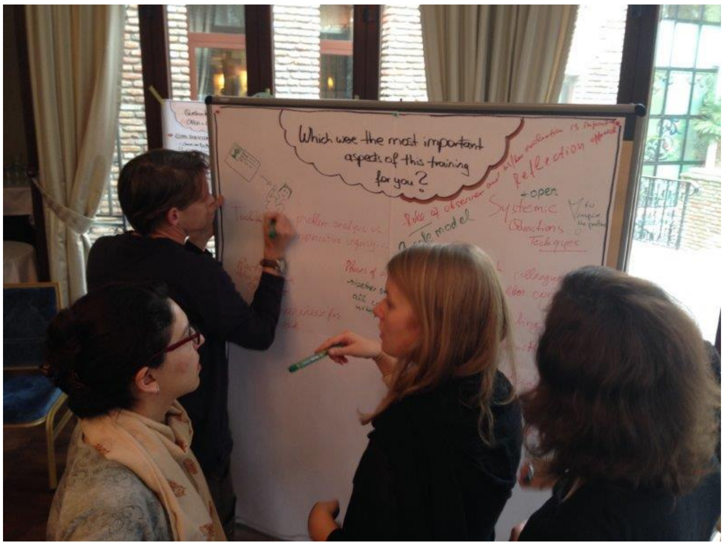
1. Which are the most important aspects of the training for you?

Cooperation in the team

- Establishing contacts
- Meet colleagues from neighbor countries
- Getting advice of your colleagues on your issues
- I go a better impression of my colleagues "world"
- Being together in this wonderful team ☺
- Peer coaching
- Sharing experiences
- Joint discussion on challenges within our daily work

Training approach

- General overview for advisory work
- Case studies
- Practical advisory work exercises
- Lessons learnt
- Role of observer and his/her evaluation is important
- Reflection approach
- Linking theories to practical
- Success factors for good advisory



Selected aspects of the training contents

- Toolkit-problem analysis and appreciative inquiry
- Open and systemic question techniques to inspire the partner
- Phases of advisory work
- Concept of process advisory
- Trust in processes!
- Becoming more aware of many different roles as an advisor, consultant, expert, negotiator
- 9-role-model, dotting partners and us!
- Role definition
- Clarifying the dividing line between process and expert advisor
- Constant switch between roles
- Stepping into the shoes of the partners

- Clarifying responsibilities
- Thoroughly get prepared before any advisory process
- Indonesia (aku cinta Indonesia, sy juga – I love Indonesia, me too)

2. Which are your concrete ideas to apply aspects of the training in your daily work?

Question techniques and phases
- Try to follow phases!
- Plan meetings according to phases of advisory and follow it
- Try to practice systemic questions in various situations
- Ask more questions – even during negotiations
- Bring examples for systemic questions to meetings as an inspiration
- Concrete objective and well-founded questions
- Focus on the meeting's objective (clear!)
- Making the scope of the cooperation clear from the beginning
- Clarify responsibilities and resource input on both sides from the very beginning
- Better understanding of result
- Document the meeting results

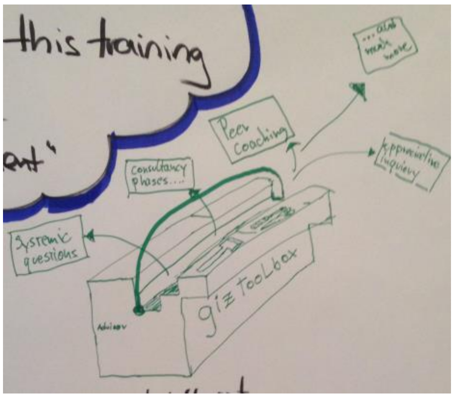
Relation-building
- Better mutual understanding
- To act more constructively
- When not sure about partner's behavior – put yourself in "his shoes"
- Make sure always that we understand the vision of the partner
- Be flexible and adaptive to the circumstances

Roles and contract
- For any issue apply multi-angle contract
- Feeling ourselves advisors experts and negotiators
- Apply 9-role-model in country teams
- Which role does GIZ ask us to take over in our job context?
- Clearly understand in which role I am not

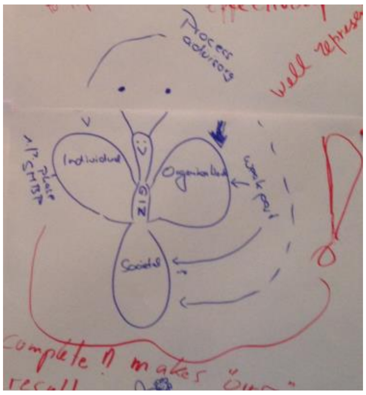
Application of other tools
- To become more oriented in process advice using appreciative inquiry and systemic questions …other tools
- Peer coaching to practice and agree on regular schedule or group, e.g. sector groups or cross country
- Finding compromises with partners, not in advisory, only when negotiating roles
- Be prepared for "out of the blue" meetings!
- Better prepare and structure discussions with partner (agree!)

Others
- Revise advisory on forest education strategy development
- Zoom out!

3. Where is the link of this training to GIZs concept of capacity development?



- Toolbox (see picture)
- Advisory training has two dimensions: increase our capacities and increase our partners' capacities
- Our training situation was comparable to "real" advisory situation (some extent ☺)
- Looking at different levels of capacity development supports systemic thinking
- The toolkit learned will support to implement capacity development concept effectively
- Process advisory quality helps to increase capacity of partners to help solve their own problems, which leads to sustainability
- System approach leads to sustainability / makes our results sustainable (hopefully)
- Butterfly (see picture)



4. On which issues/ topics/ open questions do you want to continue your learning process and how?

On-the-job
- Practice visualization on the job bassed on book provided by IBiS

Within the team work
- Half day workshop exercising systemic questions every two months (agreed by various participants)
- Practice peer coaching within the team and with other teams

Deepening topics e.g. through follow-up material and with further training
- More training related to advisory skills for the whole team
- Learn more about negotiation techniques / receiving training once a year / get materials for reading
- Learn more about "negotiation" role (various participants support negotiation techniques)
- Learn more about consultancy personalities
- Learn more about communication skills, including psychology (self-control)->NLP, active listening techniques
- Some more knowledge on systemic questions and systemic advisory in general through some materials
- Few more trainings on "roles" or "advisor and partner" with feedback and assessment, how to move from the role "partner" to role "process advisor": what would be advantages? How to make partners want our process advisory?
- How to get out of stuck situations: what steps need to be taken/ who needs to approve of change of direction? (interesting)

For more detailed quantitative information and more qualitative comments on the evaluation, please refer to the annex.

5 Recommended literature

Salacuse, Jeswald W.	**The wise advisor** – what every professional should know about consulting and counselling. Praeger 2000	The American author describes basics of consultancy in 9 chapters and herewith covers the whole spectrum between expert driven and process driven consultancy. A specialty is that also consultancy in the political field is in his focus. This book is not oriented towards methods but a guidebook to key questions in the consultancy process. A lot of hints in perceiving roles and relations.
Königswieser, R. Hillebrand; M., Ortner, J.	**Systemic Consultancy in Organisations – Concepts-Tools-Innovations.** Carl Auer Verlag 2005	Basics of systemic consultancy by the Austrian „queen" of the profession. Illustratively described, also see her work in German language.
Cooperider, D.; Whitney,D. et al.	**Appreciative Inquiry Handbook: for leaders of Change** Berrett-Koehler Publishers; 2nd edition 2008	The approach of appreciative inquiry for change in organisations in theory and practice. With a lot of tools, plans and case studies which can be implemented directly.
Yvonne Burger, Erik de Haan,	**Coaching with Colleagues: An action guide to one-to-one learning.** Ashridge 2006	The authors from the Netherlands focus on coaching as a form of joint learning with colleagues. They offer an overview of different coaching approaches and provide practical methodical tools.

http://www.change-management-toolbook.com/

Change Management Toolbook, prepared by Holger Nauheimer. Information and methods box for change management, in English**.**

Annex 1 - List of participants

	Country	Name
1.		Hans-Joachim Lipp
2.		Erich Mies
3.		Peter Sass
	Armenia	
4.		Kathrin Winterscheid
5.		Alla Berberyan
6.		Lusine Gharajyan
7.		Astghik Danielyan
8.		Ayser Ghazaryan
9.		Arthur Hayrapetyan
	Azerbaijan	
10.		Oliver Kögler
11.		Alexandra Joseph
12.		Aydin Inciyev
13.		Tomris Bayramova
14.		Serdar Hajiyev
15.		Elmaddin Namazov
	Georgia	
16.		Christian Gönner
17.		Gia Kolbin
18.		Olga Weigel
19.		Bacho Khachidze
20.		Giorgi Lebanidze
21.		Mariam Urdia
22.		Maka Katsitadze
23.		Natia Kobakhidze
24.		Ekaterine Khvedelidze
	CIM Experts	
25.		Antje Fischer
26.		Alexander Wellenbeck
27.		Irakli Samkharadze
28.		Walter Benneckendorf
	Trainer/ facilitator	
29.		Susanne Arlinghaus
30.		Roland Hackenberg

Annex 2 – Program of the training

Day 1

10 :00	Opening – Introduction by head of programme Advisory on stage – theatre pieces on typical advisory situations in the region
11 :45	*Coffee break*
12 :15	Objectives, contents and expectations - Contract clarification and contract triangle
13 :15	*Lunch break*
14 :30	Differences between technical advice and process oriented advice - roles in international cooperation
16 :00	*Coffee break*
16 :30	Taxi experiment – constructivism in advisory work
18 :00	*End of the day*

Day 2

09 :00	Brain jogging – review of previous day Interviews with appreciative inquiry method - Success factors for good advisory work
11 :00	*Coffee break*
11 :30	Review of the training and learning process and comparison with the advisory process
13 :00	*Lunch break*
14 :30	Input on elements of a system with case from Indonesia - Question techniques I : Open and closed questions – application to participants' working and advisory context
16 :00	*Coffee break*
16 :30	Team exercise using visuals and exploring systems with questions – digesting lessons learnt for question techniques and visualization as a tool in the advisory context
18 :00	*End of the day*

Day 3

09 :00	Brain jogging – review of previous day Question techniques II : Changing perspectives with systemic questions –
10 :30	*Coffee break*
11 :00	Exercise with systemic questions in small groups
13 :00	*Lunch break*
14 :30	Designing an advisory process : Phases in advisory – Short input Application: advising each other with systemic questions and in phases in triads with participants' examples and cases
16 :00	*Coffee break*
16 :30	Exercise continued and team debriefing of lessons learnt from the exercise
18 :00	*End of the day*

Day 4

09 :00	Difficult situations in advisory and their strategies
10 :30	*Coffee break*
11 :00	Peer coaching as a tool for the programme – Application and discussion on how to use it for the team's skills development and exchange
13 :00	*Lunch break*
14 :30	Real life role plays – Small group work on role plays based on real life cases – Preparation
16 :00	*Coffee break*
16 :30	Role plays 1st round
18 :00	*End of the day*

Day 5

09 :00	Role plays 2nd round
10 :30	*Coffee break*
11 :00	9 role model and positioning
12 :30	*Lunch break*
13 :30	Link to capacity development and evaluation and of training
15 :00	*End of the training*

Annex 3 – Training Evaluation

Feedback from participants

Workshop "Roles and Competencies in Consulting"

Dear colleagues,
It is our aim, that you feel well during your stay in Tbilisi and that you return with good personal and professional impressions to your home. For improving our services in the future, we like to ask you to fill carefully this feed-back form.
Thank you very much!

Internal No.		workshop dates	24.- 28.11.2015
PN	11.2197.9-001.00	countries of origin	AM, AZ, GE, D
Projekt	Sustainable Management of Biodiversity, South Caucasus	number of participants	28

		excellent	very good	good	average	bad	Remarks/Comments
1.	General impression of the training	1	14	12	○	○	Considering difficult situation, strange case studies, confusion of role plays
2.	Working methods	1	9	17	○	○	
3.	Subjects of the training	5	12	9	1	○	
4.	Facilitator/Trainer	3	12	11	1	○	1. Trainer quiet good, facilitator OK; 2. Roland did a great job; 3.Insisted on terminology that was not
5.	Group dynamics	4	13	8	2	○	
6.	Applicability for your job	7	8	11	1	○	
7.	Satisfaction of your expectations	○	8	15	4	○	Expected some psychological aspects also
8.	Time management	2	8	12	5	○	
9.	Organisation, logistics and venue	4	10	8	4	1	Venue- personnel not helpful
10.	Social, or cultural activities	5	9	10	3	○	
11.	**Please give us your specific comments on page 2! Thank you very much!**						

1. Which were the most important aspects of this training for you?

1. Definition of roles 2. Zoom out, Open and closed questions 3. Knowing my colleagues better, knowing new question technics. 4. Division of process/expert consultancy. 5. Systemic questions technique. 6. Success factors. 7. Getting advice of your colleagues on your issues. 8. Toolkit-problem analysis vs. appreciative inquiry. 9. Case studies. 10. Success factors for good advisory (better structure for all conversations with partners). 11. Practical advisory work exercises. 12. General overview for advisory work 13.Phases of advisory work. 14. Role of observer and his/her evaluation is important reflection 15.9 role model. 16. Dotting partners and us. 17. Open systemic questions + techniques. 18. Meet colleagues from neighbor countries. 19. Peer coaching. 20. Role definitions. 21. Concept of process advisory. 22. Trust in processes. 23. Becoming more aware of my many different roles as an advisor/consultant/expert/negotiator. 24. Lessons learnt. 25. Sharing of experiences. 26. Internal advisory board. 27. Find an advisor in your team. 28. Linking theories to practice. 29. Joint discussions on challenges within our daily work. 30. Akucinta Indonesia = sujuga. 31. Clarifying responsibilities. 32. Being together in this wonderful team :) 33.Stepping into the shoes of the partners. 34. I got a better impression of my colleagues' "world". 35. Thoroughly get prepared before any advisory process. 36. Constant switch between roles. 37. Clarifying the dividing lines between process expert advisors.

2. What are the concrete ideas to apply the aspects of this training in your daily work?

1. Concrete reformulation of some ongoing advisory processes. 2. Analyze the results of the training. 3. Document the results. 4. Try to follow up "phases", concrete objective and well-founded questions; Better understanding of “result". 5. Better mutual understanding 6. Focus on the meeting’s objectives (clear). 7. Better prepare and structure discussions with partner. 8. For any issue apply "multi-angle contract". 9. Try to practice systemic questions in various situations. 10. Feeling ourselves as advisors, experts and negotiators.11. Be flexible and adaptive to the circumstances. 12. To act more constructively! 13. Finding compromises with partners (compromises not only in advisory, but when negotiating also). 14. To become more oriented on process advice using appreciative inquires/ systemic questions...other roles. 15. To practice peer coaching. 16. Agree on regular schedule or group (e.g. sector groups, cross country) 17. Making scopes of cooperation clear from the beginning. 18. Be prepared for "out of the blue" meetings. 19. Document the meetings' results. 20. When not sure about partner's behavior, put yourself in "his shoes". 21. Ask more questions, even during the negotiations.

22. Revise advisory on forest education strategy development. 23. Clarify responsibilities and resource input on both sides from the very beginning. 24. Zoom out! 25. Bring examples for systemic questions to meetings as an inspiration. 26. Plan meetings accordingly to phases of advisory and follow it. 27. Make sure that we always understand the visions of the partners. 28. Clear understanding in which role I am now. 29. Which role does GIZ ask us to take over in our job context? 30. Apply 9 roles model in country teams.

3. On which issues/topics/open questions do you want to continue your learning process and How?

1. Continuously, regular practices, approaches need repetition 2.Performance assessment of feedback (by trainer) 2.Reading materials, receiving more training 3.Talking about the topic at least half an hour every week. 4. Working with the team. 5. Personal development. 6. Receive training on systemic advisory/Organizational Development. 7. Have more training on related to advisory skills for the whole team. 8. Half day workshop: exercising systemic questions every two months. 9. Learn negotiation technics/receiving trainings once a year/get materials for reading.10.Few more trainings on "roles" or "advisor and partner" (with feedback and assessment). 11. How to move from the role "partner" to role "process advisor". What would be reasons/advantages? 12. How to make partners want our process advisory? (not quite clear) 13. How to get out of "stuck" situations? What steps need to be taken / who needs to approve change of direction? 14. Negotiation techniques 15. Learn more about active listening techniques. 16. Practice visualization on the job based on book provided by IBiS. 17. Learn more about "negotiation role". 18. Practice peer coaching within the teams + with other teams. 19. More knowledge on systemic questions and systemic advisory in general through some materials. 20. Learn about "consultancy personalities". 21. Communication skills including psychology (self-control)

4. Where is the link between this training and GIZ's concept of capacity development?

1. Advisory training has two dimensions: -to increase our capacities; - to increase our partner's capacities. 2. Our training situation was comparable to "real" advisory situations (to some extent). 3. Looking at different levels of capacity development supports systemic thinking. 4. The learnt toolkit will support to implement capacity development concept effectively. 5. Process advisory quality helps to increase capacity of partners to help solve their own problems = systemic approach sustainability. 6. Three levels of capacity development (three wing butterfly) 7. Complete! Makes "our" results sustainable (hopefully...)

5. Which proposals do you have to improve the training?

1. Shorten time for discussions and reflection 2. Provide some background, agenda, etc. before training. 3. Explain agenda upfront. 4. Clarify definitions before (consulting, advisory) 5. Better coffee 6.Make objective of exercises clear (beforehand). 7. A lot of reflection on exercises (good), but not reflection on reflection. 8. Make clear who does photo documentation of training. 9. Present agenda of whole training at the beginning. 10. Provide agenda from the beginning. 11. Have/use a “Themenspeicher" (deposits of topics) 12. Better make sure relevant inputs/results are always visible/ accessible to many discussions, cut them down 13.Photo documentation??? 14. Provide exercise/ role play that suits content objective of the training 15. Better time management. 16. Clear roles definition within the team before the training might be useful, to focus on your own role. 17. More group works. 18. Clear explanation of tasks. 19. More time for group discussions 20.Pay attention on the comments that participants provided in the mid of the training 21. Reduce a bit the group work! 22. Examples of group work often not realistic 23. Smaller groups, country wise role play cases should be improved 24.Resize (little shorter would be better) 24. More related case studies.

german
cooperation
DEUTSCHE ZUSAMMENARBEIT

Integrated Biodiversity Management
South Caucasus IBiS

Programme office
Ministry of Environment and Natural Resources Protection of Georgia

6 Gulua str
0114 Tbilisi, Georgia
Tel: +995 322 201828
www. giz.de
www.biodivers-southcaucasus.org

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH