



Framing the Opportunity

What this guide will cover

1. What's the purpose of framing the opportunity?
2. Why is it important to develop a comprehensive plan for urban projects?
3. What is WRI Ross Center's role in properly defining urban projects with and for cities?
4. How can we contribute to bridge the gap?
5. What do we mean by *Opportunity cycle*?
6. And what about *value capture*?
7. What do you have to consider for a framing exercise?
8. Framing the opportunity has been used for key projects within the network!

9. Is this too much? You are not alone.

Course Content

Introduction

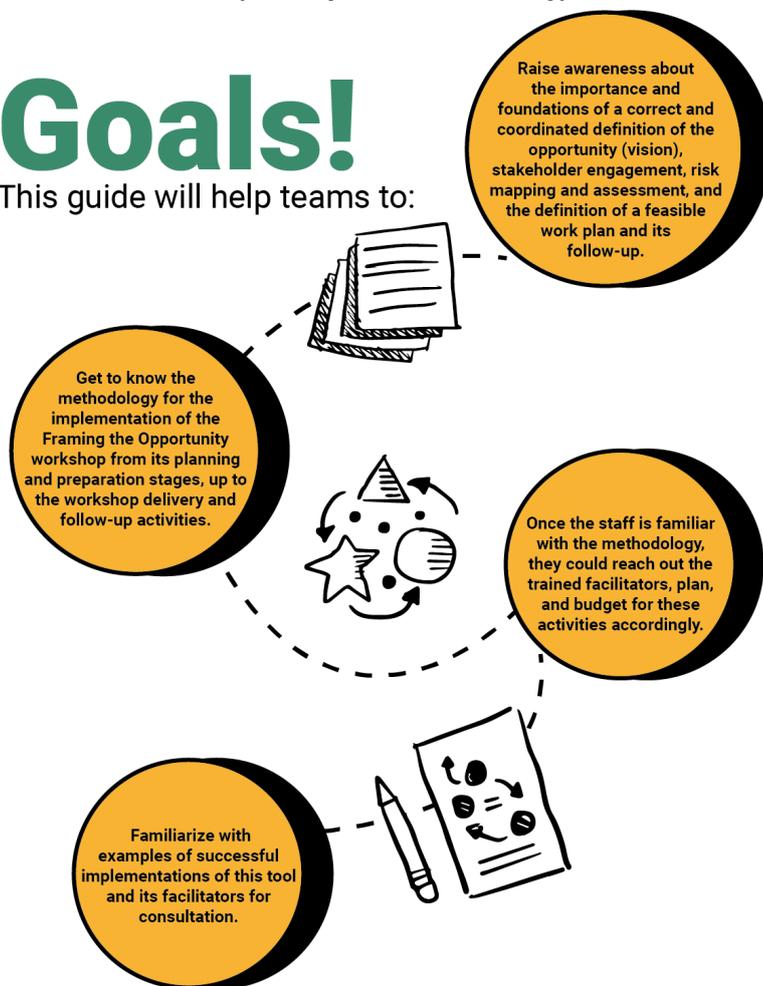
Introduction

The Framing the Opportunity: Strategic Planning for Urban Projects workshop is a structured tool/process that is applied at the beginning of a new project, initiative, or idea, henceforth the opportunity, in order to collectively create value in decision making, guiding it from conceptualization to implementation.

This Learning Guide is based on the opportunity cycle as a key concept of its methodology.

Goals!

This guide will help teams to:



Guerrero, A. & Martínez, C., 2022

What's the purpose of framing the opportunity?

- Aligns and clarifies the *opportunity* (be it an initiative, a project, or an idea), while clearly identifying where the true value of the project lies and how success will look like.

- Seeks to identify and characterize the main stakeholders involved and, according to their interest and influence level, develop differentiated engagement strategies.
- Allows to identify and characterize the risks associated to the project and, according to their likelihood and impact levels, develop mitigation and management strategies.
- Allows the identification of key points of the project implementation process where progress will need to be reassessed, project orientation reaffirmed or decide whether a strategic change is necessary.
- Serves to determine the level of effort required to carry out the project, and to guide the team based on a plan (beginning to end) that will ensure success.

Why is it important to develop a comprehensive plan for urban projects?

Cities, supported and encouraged by WRI Ross Center, need to develop successful projects that transform and improve the quality of life of their inhabitants.

The success of these processes is based on five key elements:

1. the articulation of the stakeholders involved,
2. on sound decision-making,
3. on the clarity of the functional objectives and
4. on the strategies related to the activities that involve the whole project,
5. on a robust technical framework supported by credible data and methodologies that add value.

Where do we want to be?

Where we are is often not where we want to be.



What is WRI Ross Center's role in properly defining urban projects with and for cities?

The cities with which the WRI Ross Center collaborates often face significant challenges, such as:

- Constant changes in staff.
- Little technical capacity and strategic planning tools.
- Little time availability.
- Limited links with actors from other sectors.

These challenges can compromise the success of the *on the ground* projects that WRI Ross Center develops and delivers. It is becoming more and more evident that to contribute to the implementation of successful projects, the technical strength that WRI Ross Center has provided to cities for years is not enough; rather, it is essential to consider other components.

Cities, supported and encouraged by WRI Ross Center, need to develop successful projects that transform and improve the quality of life of their inhabitants.

The success of these processes is based on five key elements:

1. the articulation of the stakeholders involved,
2. on sound decision-making,
3. on the clarity of the functional objectives and
4. on the strategies related to the activities that involve the whole project,
5. on a robust technical framework supported by credible data and methodologies that add value.

For this, Framing the Opportunity provides a proven methodology to identify these challenges and opportunities from the initial stages of project planning, ensuring that from these stages the project is built with a broad and inclusive vision, with clarity of the possible actors and associated risks, and with a viable work plan that allows achieving the objectives.

How can we contribute to bridge the gap?

Where are we?



1

Guerrero, A. & Martínez, C., 2022.

The workshop is based on the following key questions:

- **Where are we?**
- **How will we get there?**
- **Where do we want to go?**

Each phase of the Framing the Opportunity workshop corresponds to a set of exercises designed to develop comprehensive, well thought out and complete answers to these three questions. Starting with *Where are we?*, then *Where do we want to go?* and finally *How will we get there?* This particular sequence is design to keep the focus on the objective while guiding the audience through a detailed planning without detours.

What do we mean by opportunity cycle?

In every project, initiative, or idea, there is a cycle of opportunity to **capture the highest possible value** and ensure the success of the project. Within this cycle, six stages can be identified:

What to consider for a framing exercise?

**Where
are we?**



1

Guerrero, A. & Martínez, C., 2022.

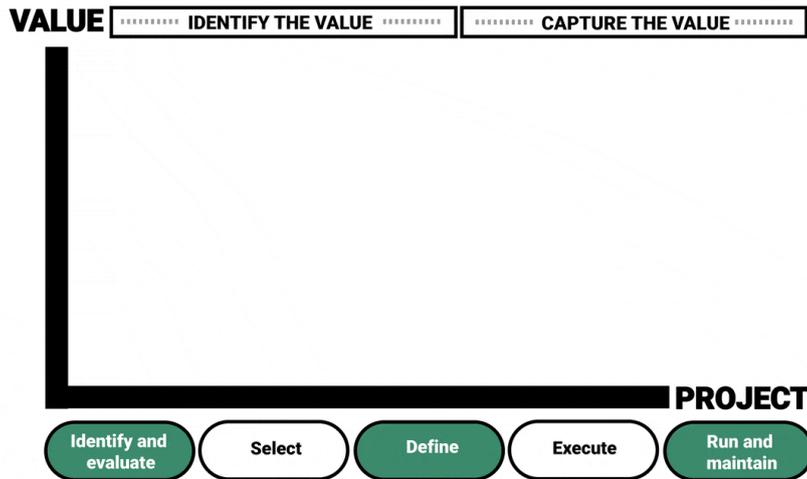
The workshop is based on the following key questions:

- **Where are we?**
- **How will we get there?**
- **Where do we want to go?**

Each phase of the Framing the Opportunity workshop corresponds to a set of exercises designed to develop comprehensive, well thought out and complete answers to these three questions. Starting with *Where are we?*, then *Where do we want to go?* and finally *How will we get there?* This particular sequence is design to keep the focus on the objective while guiding the audience through a detailed planning without detours.

What about capturing the value?

WHERE IS THE VALUE?

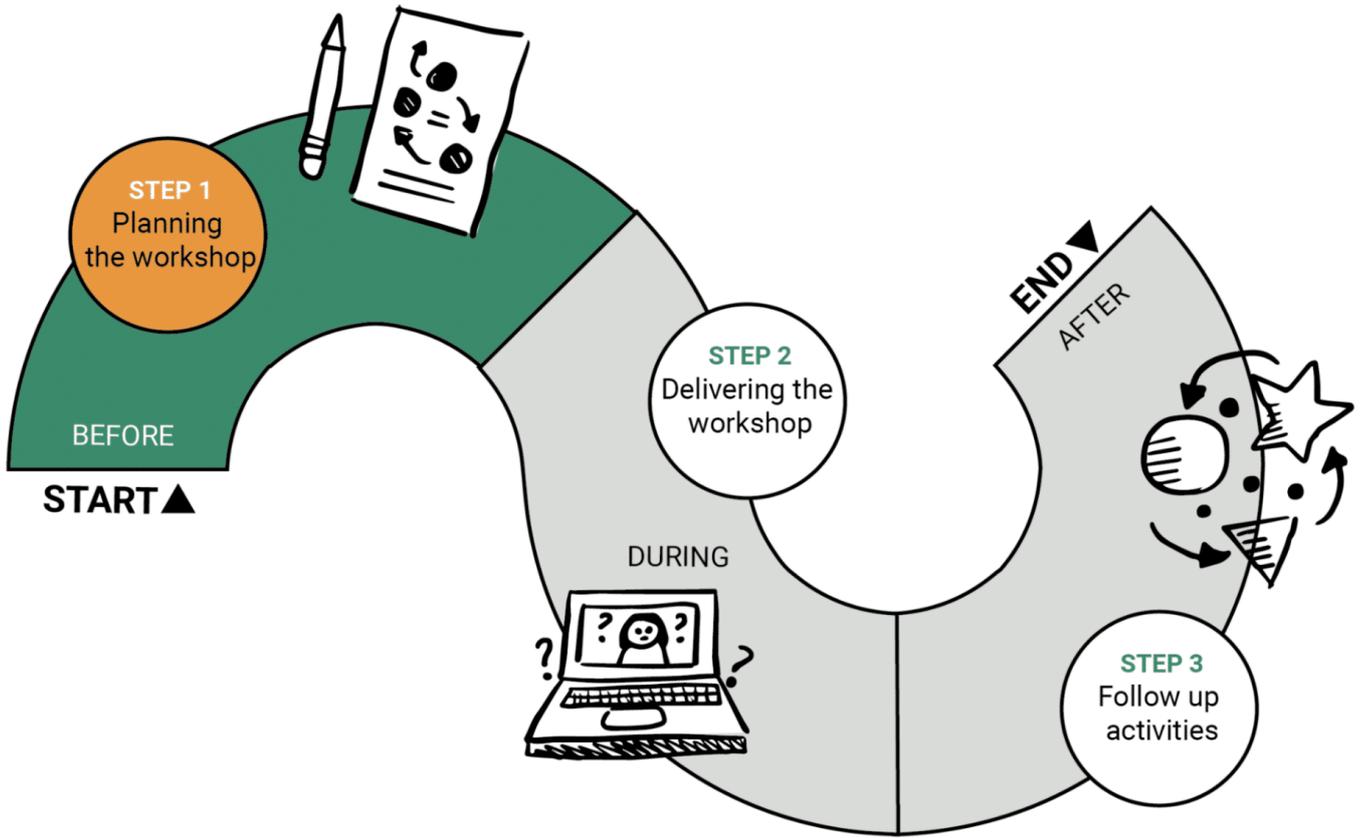


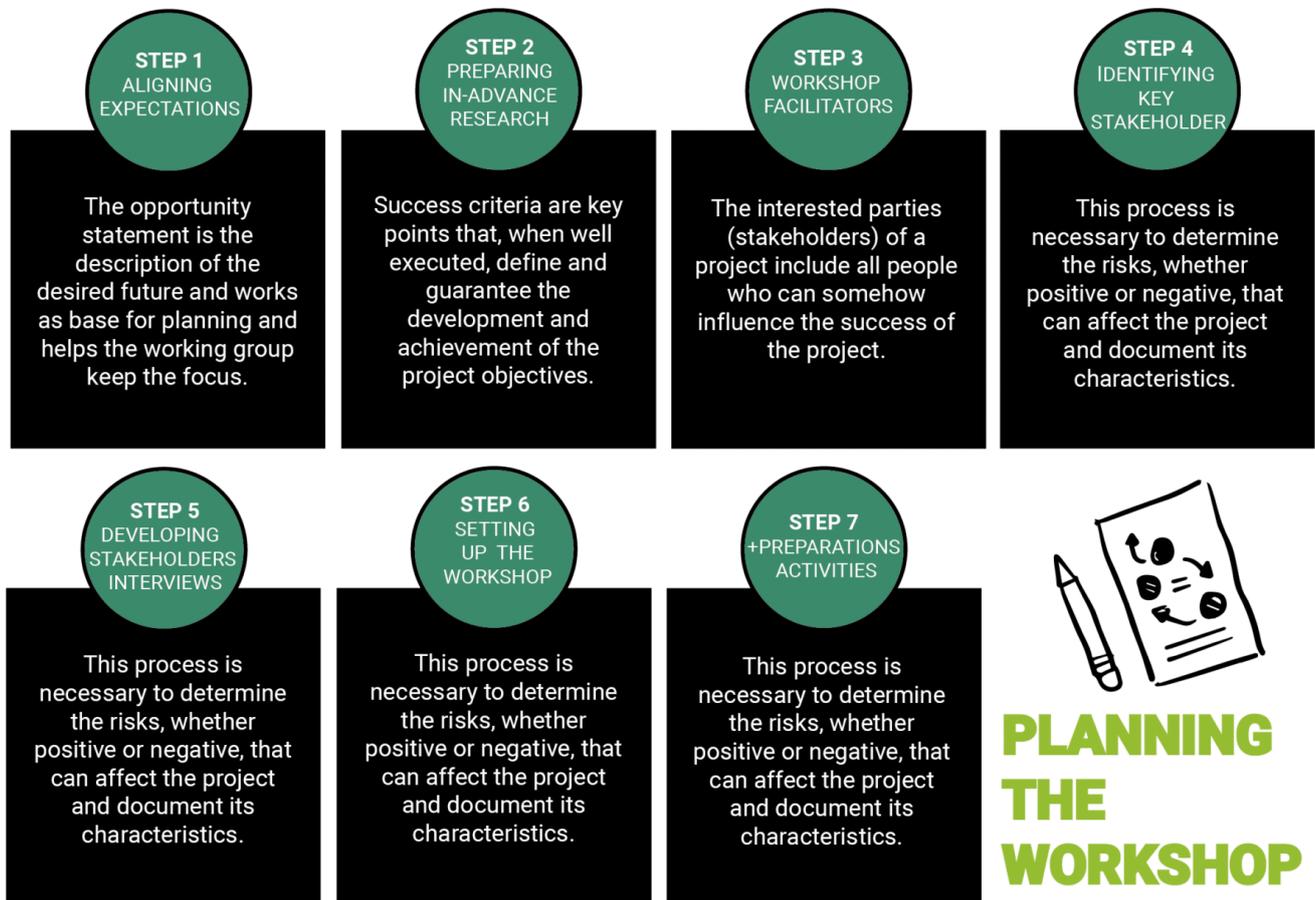
Guerrero, A. & Martínez, C., 2022.

Capturing the value of an opportunity means focusing on the key steps, products or decisions and dedicating our efforts to them. **If we skip this step, when the project begins to move forward, we are more likely to make poor decisions that might result in an inefficient use of the resources.**

All projects involve significant risks during the implementation phase. When not enough attention and effort is devoted during the definition phase of the project, the project's success, understood as reaching a higher value level than the one that existed before its implementation, can be compromised. The activities contemplated during the *Framing the Opportunity* workshop, seek that through a methodological process, an adequate definition of the *opportunity* is made and with this, the risks of a poor execution are minimized. In other words, it is intended that even if these risks happened, the situation after the implementation of the project is better off than if it had not been carried out.

Step 1: Planning the workshop





The activities that need to be covered before the workshop takes place are listed as follows:

Aligning expectations

It is critical to agree with the counterpart, government entities, think or do-tanks, local communities, or other teams within WRI, on which is the outcome, methodology and scope of the exercise, as well as on the involvement and visibility to ensure the buy-in while keeping the neutrality and confidence of the participants.

Preparing in-advance research

The facilitators must be familiar with the local conditions surrounding the *opportunity*. If this cannot be achieved through previous experience, this a good chance to do so through some research.

Workshop facilitators

A team of 2 or 3 people trained in Framing methodology is set. If possible, specialists or with a broad knowledge of the topic in which the workshop will be implemented. In-advance research and interviews can help to strengthen this familiarity.

Identifying key stakeholders and selecting the participants

Participants are expected to engage directly and actively in discussion and exercises designed to be answered in a comprehensive, clear, and complete manner. The facilitator team will develop an initial map of key stakeholders, including political, private, public, academic, and civil society stakeholders. This first draft is a living document that must be constantly updated, seeking as far as possible to reflect the diversity and complexity of the project environment.

Developing stakeholder interviews

On preparation to the workshop, the team of facilitators carries out interviews among the key stakeholders associated with the project. These will help to understand the different pre-conceived ideas, positions, priorities and resources towards the current situation and towards the future *opportunity*. These interviews will also help shape the workshop to better meet the needs of the counterpart.

At this point you already have some data to identify the strengths and weaknesses of the project, but the expectations and frustrations of each of the stakeholders must still be raised, since the success of the workshop strongly relies on these.

Setting up the workshop. Schedule, premises, and materials

This phase is a great opportunity for collaboration with the counterpart. Their active involvement can strongly contribute to the ownership of the results and strengthen their role as a leader in the *opportunity*. At the same time, it is important to make sure that this involvement does not inhibit the participation of the guests or compromise the neutrality of the exercise.

Schedule

Activities in plenary with the group of participants can be scheduled to take place between one and two days. The workshop is a networking *opportunity* between people who do not always know each other. Therefore, it is also key to allocate time for them to introduce themselves, ice-breaking activities, and informal chats. The pauses for coffee and lunch are by no means *wasted time*, on the contrary they can contribute to start a community around the *opportunity*. To encourage creative and active participation, it is essential that the work schedule considers the appropriate pauses for participants to rest, attend to other pending issues and talk with other participants.

Premises

The premises chosen for delivering the workshop must ensure neutrality so that the participants do not feel intimidated by certain actors or institutions. Spacious meeting rooms are suggested, preferably multipurpose rooms with flexible furniture that allows participants to take different configurations according to the activity and that the materials developed can always be in seen and consulted.

Materials

The materials are very important for delivering the workshop, should be plenty available for all the participants to encourage their participation at every moment. Colored sticky notes and markers might help not only to encourage creativity but also to create color codes for different parts of the workshop.

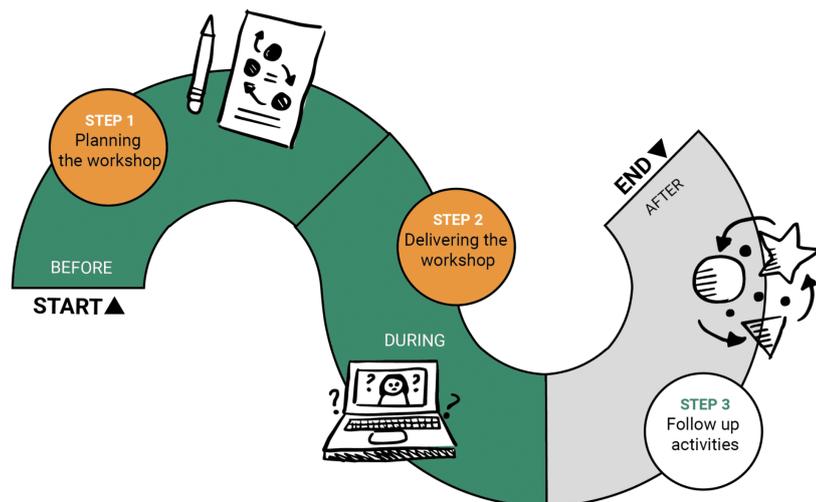
Other preparation activities

In addition to the previous section, some other preceding activities should be carried out either by the facilitators, the counterpart or a committee set up for this purpose:

- Logistics coordination of the workshop, travel, etc.
- Scheduling interviews between key stakeholders and facilitators.
- Create an agenda for the workshop.
- Send out invitations to the workshop.

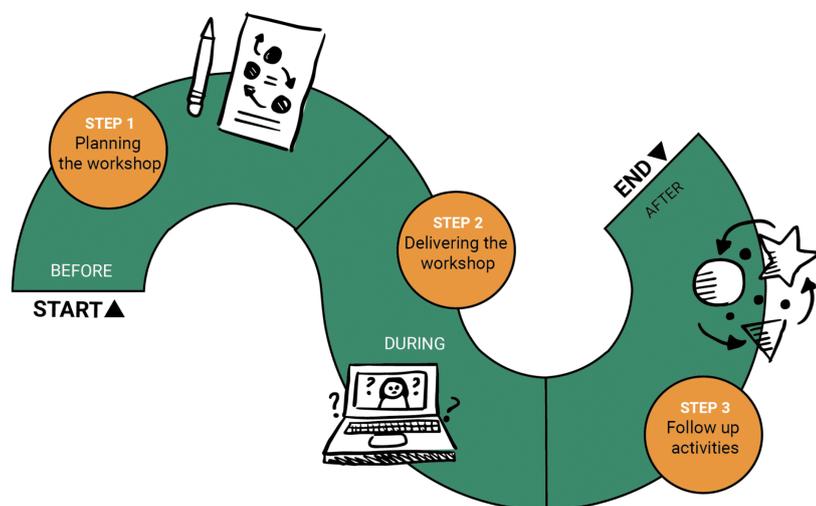
Delivering the workshop

Step 2: Delivering the workshop



Guerrero, A. & Martínez, C., 2022.

Step 3: Follow-up activities



Guerrero, A. & Martínez, C., 2022.

And after the workshop?

Facilitators should commit to submit a final report of the workshop results no later than two weeks after the closure date. As part of the final report, the facilitators will provide a success map of the *opportunity*, clearly showing on a single sheet all key *opportunity* activities, steps and decisions that will need to be met to ensure its successful implementation.

If possible, it is recommended to agree with the counterpart on a follow-up plan and an implementation committee to ensure the results of the workshop will be carried out.

Who has used it and what is their experience?

Framing the opportunity has been used for key projects within the network!

“The workshop helped us to contextualize and broaden our panorama about the strategy that we wanted to apply at the time. Identify and manage potential support and alliances with other levels of government and civil society that could add. It was easier and more practical to act the strategy. The exercise led to the construction of a Sustainable Urban Mobility strategy at the state level that led to the creation of a new legal framework.

I would recommend to other teams to seek cooperation alliances as well as broaden the panorama through the knowledge of other processes at the national and international level.”

Alberto Partida

Head of the Planning Institute of the City of Tepic, México

“The accompaniment of WRI Mexico before, during and after the implementation of the Guadalajara BRT system was vital for its development. As an unquestionable technical advisor, they accompanied, promoted and protected the system, articulating various social actors of the State. Their participation helped support decisions in innovative ways and at the nerve centers of the process. WRI México was essential for Macrobus to break paradigms in the mobility of Guadalajara; it was shown that the transition from the man-truck to organized transport companies is possible ”.

Diego Monraz

Head of the Mobility Secretariat of the Jalisco, México

Framing facilitators

Is this too much? You are not alone!



Guerrero, A. & Martínez, C., 2022.

DC: Sebastian Varela

Mexico: Adriana Lobo, Fernando Páez, Angélica Vesga and Tanya Jiménez.

Brazil: Toni Lindau, Rita Tomilin, Cristina Albuquerque, Henrique Evers and Paula dos Santos.

The process might look overwhelming but is worth it. More importantly, **you are not alone.**

The Ross Center has the resources and a team of specialized people with an ample experience in

planning and implementing these exercises! We can support you through the planning and budgeting for these exercises.

Reach out to us!

Visit other websites in our broader digital ecosystem:



Copyright (c) 2023 [World Resources Institute](#). All Rights Reserved. | [Privacy Policy](#) | [Terms & Conditions](#)

<https://thecityfixlearn.org/courses/framing-the-opportunity-2>