

# Branch Organisational Capacity to Act (BOCA 2.0) WORKSHOP FACILITATION GUIDE

This is “Branch Organisational Capacity to Act (BOCA 2.0) Workshop Facilitation guide” aims to support BOCA facilitators run the workshop within a branch.  
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## Chapter 1: BOCA 2.0 Workshop Overview

### The BOCA 2.0 Workshop

- The BOCA 2.0 workshop will typically run across 2 days and sample agenda for participants is as below:

#### Participants' agenda (Sample)

DAY 1	
Time	Topic / Session
09:00-10:30 (90min)	Introduction and Ice-breaker
	Branch Puzzle
	What is a strong branch for you?
10:30 – 10:50 (20 min)	Coffee break
10:50 – 12:30 (100 min)	BOCA matrix
12:30 – 13:30 (60 min)	Lunch
13:30– 15:00 (90 min)	Cont. BOCA matrix
15:00 – 15:20 (20 min)	Coffee Break
15:20 – 16:30 (60 min)	Cont. BOCA matrix
16:30 – 17:00 (30min)	Reflection

DAY 2	
Time	Topic / Session
09:00 – 09:20 (20 min)	Recap of day 1
9:20 – 10:30 (70 min)	Cont. BOCA matrix
10:30 – 10:50 (20min)	Coffee break
10:50 – 11:30 (40min)	Analysis and prioritisation
11:30-12:30 (60min)	Road mapping
12:30-13:00 (30min)	Wrap-up and closing the workshop

## Chapter 2: BOCA 2.0 Facilitator's Resources

### Resources needed:

- As a BOCA facilitator, make sure the following items are prepared prior to starting the BOCA workshop
  - [BOCA tree](#) in a large printout (one per group)
  - Flipcharts
  - Sticky tack or masking tape to put BOCA tree up on a wall or flipchart stand
  - 5 different coloured post-its (ideally green, yellow, orange, red + one neutral colour - if not available coloured papers could also be used together with Sellotape)
  - Markers
  - Printed facilitator's agenda for facilitators (outlined in this guide [section 3](#))
  - Printed [BOCA matrix](#) for facilitators
  - Printed copies of the [Branch development Roadmap](#)
- Optional:
  - Projector to show slides if using the PPT slide deck available
  - Printed hand-out of the BOCA matrix

You may find the list of BOCA workshop resources recapped in the [ANNEX](#)

### Preparation for the NS and Facilitators:

- Use the Sample Agenda (outlined in this guide [section 2](#)) to develop a specific agenda for BOCA workshop participants.
  - Plan lunch breaks and coffee breaks according to the National Society/ Branche's usual procedures.
  - The BOCA matrix can be completed in day 2 if not sufficient time in day 1. As an estimate, count on an average of 10 minutes per attribute = 350 minutes if using all attributes in the workshop.
- Check the NS/Branch's planning and budgeting practice, and define how BOCA results and roadmaps could be captured in any existing planning cycles.
- Check which NS quality standards the NHQ would like to highlight in the workshop – and prepare the list of such quality standards or print them out – prior to facilitating attribute no 26.
- Print out the BOCA tree in a large printout, one per group if you have many participants and plan to breakout the group

### Preparing for the workshop:

The day before or in the morning before participants arrive:

- Prepare the room – arrange chairs in a semicircle so participants can engage easily with each other and so that everyone can see the BOCA tree
- Prepare flipcharts for the Boca Puzzle exercise, a parking lot, and the questions for the roadmapping exercise
- Prepare a parking lot – a place to record any ideas that come up during the workshop which can help the branch in their planning process.
- If using a projector to show the PPT slide deck, make sure everything works correctly

### Chapter 3: BOCA 2.0 workshop agenda for facilitators

This agenda for facilitators outline an overview of the 2 day workshop and key facilitation steps and methods. Further details are outlined in following Chapter 4 Workshop facilitation guide.

#### Day 1:

Setting the stage and explaining the workshop		
Time	Topic	Facilitation method
60-90min	Opening of workshop and setting the scene	<p>Open the workshop following the branch's usual procedures.</p> <p>Facilitators introduce themselves and the purpose of the BOCA workshop. Important to highlight that:</p> <ul style="list-style-type: none"> <li>• BOCA is a tool for self-reflection, not an audit and not a NHQ assessment</li> <li>• The manner in which BOCA will be used within the NS, what will happen with the results, and what is expected from branches after the workshop</li> <li>• BOCA is a global tool being used by branches across the globe, and that it has been adapted to fit the local context</li> <li>• Explain the flow of the workshop</li> </ul>
	Introduction and Ice breaker	<p>Fun ice breaker and introduction of the participants – getting to know each other. The methodology will vary based on how well the participants already know each other, so you can pick an exercise that fits the context. It is important that the participants know who is in the room and and feel comfortable.</p> <p>Examples of ice breakers to use:</p> <ul style="list-style-type: none"> <li>• Ask participants to introduce themselves and <ul style="list-style-type: none"> <li>○ mention a fun fact about themselves</li> <li>○ mention which animal they would like to be</li> <li>○ Mention which is their favourite Fundamental principle and why</li> </ul> </li> </ul>
	Branch puzzle	<p><b>Purpose:</b> The purpose of the branch puzzle is for all participants to have a shared understanding of the branch before starting the workshop deliberations. You can choose one or more topics from the list below. Decide together with the NS before starting which topics to cover during the Branch puzzle.</p> <p><b>Topics for branch puzzle:</b></p> <ul style="list-style-type: none"> <li>• Key events/milestones in the branch over the last 3 years</li> <li>• Key events/milestones in the country and/or local area over the last 3 years</li> <li>• Activities or services delivered by the branch over the last 3 years</li> <li>• Number of volunteers/staff/members over the last 3 years</li> <li>• Who are the Branch's local stakeholders</li> </ul> <p><b>Step 1: Individual reflection (5 mins)</b></p> <ul style="list-style-type: none"> <li>• Give participants post-it notes in two colours and ask them to think of: <ul style="list-style-type: none"> <li>○ Key events/milestones within the branch over the last three years (on one colour post-its)</li> <li>○ Key events/milestones in the country and local area that have affected the work of the branch over the last three years (on the other colour post-it)</li> </ul> </li> </ul> <p><b>Step 2: Sharing in plenary (10 mins)</b></p> <ul style="list-style-type: none"> <li>• Make a timeline on a flipchart and ask participants to come up and put their post-its on the timeline and explain to the others.</li> <li>• Ask if there are any questions or points for clarification, for example from newer members.</li> </ul> <p><b>Step 3: Repeat the process for the other topics to populate the puzzle (optional)</b></p>

	<p>What is a strong branch for you?</p>	<p><b>Purpose:</b> To set the stage and introduce definition of a strong branch and the 11 elements the BOCA workshop will cover</p> <p><b>Step 1: Individual reflection (5 min):</b></p> <ul style="list-style-type: none"> <li>Ask: “When you think of a strong branch, what comes to mind? What are the key elements?”</li> <li>Give participants sticky notes or paper to write down 2–3 points each.</li> </ul> <p><b>Step 2: Sharing in plenary (10 min):</b></p> <ul style="list-style-type: none"> <li>Facilitator collects the inputs from participants.</li> <li>Cluster similar ideas together on a flipchart or wall.</li> <li>Acknowledge the variety of perspectives.</li> </ul> <p><b>Step 3: Introduce the Strong Branch (10 min):</b></p> <ul style="list-style-type: none"> <li>Show the visual of the Strong Branch (a.k.a. BOCA tree)</li> <li>Explain: “These 11 elements represent the agreed definition of a strong branch. They also form the structure of the BOCA matrix.”</li> <li>Briefly describe each branch element (use the detailed explanation from the <a href="#">Chapter 4. BOCA 2.0 Facilitation guide</a>).</li> </ul> <p><b>Step 4: Link to the matrix (5 min):</b></p> <ul style="list-style-type: none"> <li>Highlight: “The BOCA matrix helps us unpack each of these 11 elements in detail, so we can see where the branch is strong and where there are gaps.”</li> </ul> <p><b>Tips:</b></p> <ul style="list-style-type: none"> <li>Encourage participants to speak from their own experience, not theory.</li> <li>Use the tree visual as a bridge between personal reflections and the Branch Development framework.</li> </ul>
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**BOCA Matrix**

<b>Time</b>	<b>Topic</b>	<b>Facilitation method</b>
<p>340 minutes (if using all attributes)</p>	<p>BOCA matrix</p>	<p><b>Step 1: Introducing and explaining the BOCA matrix</b></p> <ul style="list-style-type: none"> <li>Draw the BOCA stairs (or show the stair diagram in the slide if using a projector) and explain how the matrix and the scoring works. (Follow the script in the <a href="#">Chapter 4: BOCA 2.0 Facilitation guide</a>)</li> <li>Repeat that this is not an audit but an opportunity for the branch to reflect.</li> <li>Explain that it is the participants who will agree on the final score by consensus, not the facilitator</li> <li>Ask if there are any questions</li> <li>Say that you will do a first test round and that there will be opportunities to ask questions again after that if something is still unclear</li> </ul> <p><b>Step 2:</b></p> <ul style="list-style-type: none"> <li>The role of the facilitator is to facilitate a dialogue with the participants, so use the matrix as a guide for these discussions</li> <li>The facilitators take turns to read out the questions related to each attribute and then take the participants through each of the reflection points to determine the score by consensus.</li> <li>Pose the reflection points like questions to the participants and encourage them to reflect on these as a group</li> <li>Start with the first attribute on Fundamental principles. Allow the pace to be a bit slower to ensure everyone understands the methodology. Ask if there are any further questions.</li> <li>Continue with the rest of the matrix</li> <li>For each completed attribute, record the branch’s consensus score as follows and put it up on the BOCA tree next to the topic discussed: <ul style="list-style-type: none"> <li>A: Red</li> <li>B: Orange</li> <li>C: Yellow</li> <li>D, E, F: Green</li> </ul> </li> </ul>

		<p><b>Attribute 26 “Applying agreed quality standards”:</b></p> <ul style="list-style-type: none"> <li>• Prior to the matrix exercise ask the NHQ focal person which “quality standards” that branches should be adhering to (e.g. PMER guide, financial procedures etc) and keep note of them.</li> <li>• During the matrix exercise, inform participants all the standards selected by the NHQ, and ask:             <ul style="list-style-type: none"> <li>○ For B; if they know of it</li> <li>○ For D/F; how many of them they apply (if some – D/ if all – F)</li> </ul> </li> </ul> <p><b>Note to facilitators:</b> Record all concrete ideas that come up during the matrix discussions on post-its in a neutral colour and put these up on the parking lot</p>
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**Day 2:**

Introduction to Day 2		
Time	Topic	Facilitation method
15 min	Recap of day 1	Recap of day 1 and updating what will happen today
60-120 mins	BOCA Matrix continued	Finalise the BOCA matrix exercise
Analysis and prioritisation		
Time	Topic	Facilitation method
30 min	Analysis and prioritisation	<p><b>Step 1: Gathering around the tree:</b></p> <ul style="list-style-type: none"> <li>• Invite participants to look at the branch tree with sticky notes showing the current situation.</li> <li>• Explain the colour coding of the post-its</li> <li>• Ask: “What story does this picture tell us about the branch today?”             <ul style="list-style-type: none"> <li>○ Ask prompting questions such as: “Does anything surprise you?”, “What does it tell us when the leaves are green?”, “What does a yellow leaf tell us?”, “What happens to green leaves if you do not water them?”</li> </ul> </li> <li>• Encourage discussion of patterns (e.g. what does it tell us if there are many reds in governance, mostly greens in services).</li> <li>• Ensure that the discussion is not only focusing on gap areas, but also the strengths observed.</li> </ul> <p><b>Step 2-1: Root cause reflection</b></p> <ul style="list-style-type: none"> <li>• Ask: “Why do we think this situation looks like this? What are the main reasons?”             <ul style="list-style-type: none"> <li>○ How do the different areas connect? Why is this happening? What is behind these situations?</li> </ul> </li> <li>• Capture key reflections and refer these back to the participants. Use phrases such as: “I hear you say that...., is this correct?”</li> </ul> <p><b>Step 2-2: Prioritisation through Voting</b></p> <p><i>If participants have already naturally defined a manageable number of core issues they want to work on and priorities during step 2-1, the facilitator can decide to skip the voting and move directly to Step 2-3.</i></p> <ul style="list-style-type: none"> <li>• Ask: “Going back to your own definition of a strong branch, and what we have been discussing during the workshop, where should we focus our efforts over the next 12 months?”</li> <li>• Each participant receives 3 votes (stickers).</li> <li>• Encourage thinking about:             <ul style="list-style-type: none"> <li>○ Which areas are most important for our branch?</li> <li>○ How can we build on our strengths to also work on some of the identified gaps?</li> <li>○ Are there connecting areas that could be addressed together?</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>○ Where can we make the biggest difference by working together?</li> <li>○ Where can we take action ourselves (without waiting for others)?</li> </ul> <p><b>Step 2-3: Reviewing results</b></p> <ul style="list-style-type: none"> <li>• As facilitators, tally the votes and highlight the top 2–3 areas that received the most votes.</li> <li>• Confirm with the group: <i>“Are we comfortable that these are the areas we should prioritise?”</i></li> </ul> <p><b>Tips for facilitators:</b></p> <ul style="list-style-type: none"> <li>• Keep participants focused on identifying a few clear priorities (not solving everything).</li> <li>• Encourage balance: something urgent, something with big impact, and something achievable.</li> <li>• Avoid letting the conversation drift into designing actions or solutions at this stage—that comes in the roadmapping step.</li> </ul>
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Roadmapping		
Time	Topic	Facilitation method
60min	Roadmapping	<p><b>Step 1: Visioning exercise</b></p> <ul style="list-style-type: none"> <li>Invite everyone to close their eyes and imagine the branch 3 years from now.</li> <li>Say: “It’s [Month/Year], three years from today. You’ve worked on your key areas you defined and prioritised. What does your branch look like now?”</li> <li>Participants write what they imagine on sticky notes and share their vision in plenary.</li> </ul> <p><b>Step 2: Planning next steps</b></p> <ul style="list-style-type: none"> <li>Ask the participants to gather around a table or other suitable space to work on the plan. Option to take notes on flipcharts or on a laptop, using the Branch Development Roadmap template</li> <li>Say: “Building on the Vision shaped by the team, what are the things you need to do as a branch in order to achieve this?”</li> <li>Encourage the participants to think of steps and actions they can do themselves with existing resources</li> <li>Give the participants a flipchart with the following questions to help guide the discussion: <ul style="list-style-type: none"> <li>What are some things you can do differently? Or do more of?</li> <li>What are three concrete actions that you could take right now?</li> <li>What are three actions you would like to take in the more long-term (3 years)?</li> <li>What support would you need, and from whom?</li> <li>How will you follow up and inform the wider branch of the priorities?</li> </ul> </li> </ul> <p>If needed to inspire the thinking, you can encourage the participants to reflect on:</p> <ul style="list-style-type: none"> <li>Is there something that you have tried previously that didn’t work? How can you work on it differently</li> <li>What are some small steps you can take starting from next week to make changes happen?</li> </ul> <p><b>Step 3: Documenting</b></p> <ul style="list-style-type: none"> <li>The workshop results, prioritisation and initial ideas for action will be captured by the branch in the Branch Development roadmap template</li> <li>If the NS/Branch already has an annual plan, the defined actions should be integrated with existing plans and the group should agree how this will be done</li> <li>The group will agree on how the information from the workshop will be shared with the rest of the branch</li> <li>A reporting template is available for facilitators to capture the discussions and priorities during the workshop</li> <li>The BOCA tree will remain in the branch for future discussions.</li> </ul> <p><b>Tips for facilitators:</b></p> <ul style="list-style-type: none"> <li>Keep it light and exploratory — this is about <i>direction</i>, not detailed planning.</li> <li>Encourage participants to think in terms of achievable steps (“what can we start with?”).</li> </ul>
Wrap up and closing of BOCA workshop		
Time	Topic	Facilitation methodology
15 mins	Wrapping up and closing the workshop	<ul style="list-style-type: none"> <li>Congratulate the branch for completing the BOCA workshop. Briefly recap the next steps both for the branch and for the NS as a whole.</li> <li>Close the workshop using the standard closing procedures of the branch</li> </ul>

## Chapter 4: BOCA 2.0 workshop Facilitation guide

### Aim of this chapter:

- This is a guide to support BOCA Facilitators run the BOCA 2.0 workshop in a branch.
- In this guide you will find instructions for how to prepare for and facilitate the different modules of the BOCA workshop.
- The workshop can be designed to last 1,5-2 days. In Chapter 3 the Facilitator’s agenda is outlined to help you plan and which you can refer to during the workshop.
- Go through the agenda together with your co-facilitator before the workshop and decide who facilitates which part.

### The role of the facilitators

The BOCA workshop is facilitated by two facilitators working as a team. The role of the facilitators is to help guide the participants in their joint discussion and they can ask probing questions but are not engaging in the discussions themselves. It is not for the facilitator to determine the scoring, this is up to the participants even if as a facilitator you do not privately agree with the consensus score.

Setting the stage and explaining the workshop	
Objective:	To set the stage, create a good atmosphere in the room, and explain what is going to happen over the next two days.
Participants will:	<ul style="list-style-type: none"> <li>• Get to know each other</li> <li>• Understand the purpose of the BOCA workshop and agree on workshop rules</li> <li>• Understand how BOCA will be used for Branch Development within the National Society</li> <li>• Have a joint overview of the branch over the last three years</li> <li>• Understand the definition of a strong branch</li> </ul>
Time:	60-90 minutes

### Opening the workshop

#### Methodology:

Open the workshop following the branch’ usual procedures. Welcome the participants and introduce yourselves as facilitators. Explain the purpose of the BOCA and how it will be used within the National Society. Explain what the flow of the workshop will be and that the expected outcome is a Branch Development Roadmap. Explain the role of the facilitators. Agree on rules for the workshop.

#### Important to highlight:

- BOCA is a tool for self-reflection, not an audit and not a NHQ assessment of the branch
- The manner in which BOCA will be used within the NS, what will happen with the results, and what is expected from branches after the workshop
- BOCA is a global tool being used by branches across the world, and that it has been adapted to fit the local context
- Explain the flow of the workshop

### Introduction and icebreaker

#### Methodology:

Do an icebreaker to allow the participants to introduce themselves and get to know each other. You can choose any ice breaker of your own or get inspiration from the list below:

- Ask participants to introduce themselves and mention:
  - which is their favourite fundamental principle
  - which animal they see themselves as
  - A fun fact about themselves
  - Which is their favourite fundamental principle and why

### **Branch Puzzle**

The purpose of the branch puzzle is for all participants to have a shared understanding of the branch before starting the workshop deliberations. The two highlighted topics are standard, but you can choose to add one or more topics from the list below. Decide together with the NS before starting which topics to cover during the Branch puzzle.

Topics for branch puzzle:

- **Key events/milestones in the branch over the last 3 years**
- **Key events/milestones in the country and/or local area over the last 3 years**
- Activities or services delivered by the branch over the last 3 years
- Number of volunteers/staff/members over the last 3 years
- Who are the Branch's local stakeholders

### **Methodology:**

#### *Step 1: Individual reflection (5 mins)*

- Give participants post-it notes in two colours and ask them to think of:
  - Key events/milestones within the branch over the last three years (on one colour post-its)
  - Key events/milestones in the country and local area that have affected the work of the branch over the last three years (on the other colour post-it)

#### *Step 2: Sharing in plenary (10 mins)*

- Make a timeline on a flipchart and ask participants to come up and put their post-its on the timeline and explain to the others.
- Ask if there are any questions or points for clarification, for example from newer members.

#### *Step 3: Repeat the process for the other topics to populate the puzzle (optional)*

### **What is a strong branch for you?**

The purpose of this exercise is to set the stage and introduce the definition of a strong branch. This will help explain the logic of the matrix later and will be a useful start to guide participants to start thinking about branch development.

### **Methodology:**

#### *Step 1: Individual reflection*

- Ask: "When you think of a strong branch, what comes to mind? What are the key elements?"
- Give participants sticky notes or paper to write down 2–3 points each.

#### *Step 2: Sharing in plenary*

- Facilitator collects the inputs from participants.
- Cluster similar ideas together on a flipchart or wall and read out what the participants wrote
- Acknowledge the variety of perspectives.

#### *Step 3: Introduce the Strong Branch Tree*

- Show the BOCA tree

- Explain: *“These 11 elements represent the agreed definition of a strong branch. They also form the structure of the BOCA matrix.”*
- Briefly describe each of the 11 element:
  1. Contribute to the overall strength and visibility of the National Society  
Say: *“This element is about how well the National Society is practicing the fundamental principles, how the emblem is used and understood, and how the auxiliary role is understood and demonstrated”*
  2. Understand local and diverse needs of the community  
Say: *“Here we will talk about how well you understand your local context and the existing needs, and how well you engage with the communities you are serving with your activities and services”*
  3. Ability to deliver relevant services  
Say: *“This element covers whether or not you as a branch ensures that your services and activities are relevant and based on the information you have about the local context and needs”*
  4. Cultivate good governance and develop leadership across the branch  
Say: *“Here we will cover the topic of governance and leadership. Not just the formal roles, but also how you encourage volunteers and youth to learn and grow and how you foster an inclusive leadership culture in the branch”*
  5. Shape a network of volunteer-based units  
Say: *“Volunteers are the backbone of the National Society and in this element, we will discuss how well you are able to recruit the volunteers you need, encourage and motivate them, and also ensure that volunteers are safe when they are on duty”*
  6. Build local relationships  
Say: *“A branch does not operate in a vacuum. In order to facilitate local support and networks, you need to be connected to and aware of what other actors do, such as local authorities, other organisations and community groups. This is what we will unpack in this element”*
  7. Sustain for as long as needed  
Say: *“A strong branch is able to sustain activities and services for as long as the needs exist. In this element, we are going to discuss sustainability and how you consider this in your planning”*
  8. Mobilising and managing resources  
Say: *“In this element we will talk about how you as a branch are able to mobilise resources locally to cover your costs and how well you can manage finances accountably in a transparent manner”*
  9. Ensure quality and practice integrity  
Say: *“Services and activities must be delivered to a high standard to meet the expectations of the community. As a branch you need to also demonstrate integrity to gain trust and access”*
  10. Ability to scale based on needs  
Say: *“This element is about how well you as a branch is able to scale up or down when needs change, and about how well you are prepared and able to respond if a disaster or crisis occurs”*
  11. Enabling capacities: Branch infrastructure and operational readiness  
Say: *“In this section we will talk about enabling capacities, these are the things that help you deliver activities and services, such as infrastructure, communications and logistics. These are of course important, but only as a support to the other elements we will discuss beforehand as the most important thing is not how big your branch office is, but how well you manage to use what you have to mobilise volunteers and deliver relevant services”.*

**Step 4: Link to the matrix:**

- Summarise: *“During the BOCA matrix exercise we will unpack each of these 11 elements in detail, so we can see where the branch is strong and where there are gaps. As you can see, these elements are all related. If you are well known and respected in the community, and people feel that what you do as a branch is relevant, it will be easier for you to mobilise local resources and people will want to volunteer with the branch. And vice-versa, if you lose trust, if people don’t know who you are and what the mandate of the Red Cross Red Crescent is, it will be very difficult to operate and do the things we want to do as a branch”*

BOCA Matrix	
Objective:	Participants have come to a consensus about the current status of the branch
Time:	Approx. 300-350 minutes if all attributes are being used. The BOCA matrix exercise can continue on day two if not completed in day one.

### Introducing the BOCA matrix

#### **Methodology:**

Start by reminding participants that this is not an audit, but a self-reflection. Also remind them that it is important that all voices are heard during the discussions and that results will be agreed on through consensus.

Explain the logic of the BOCA matrix. Draw the BOCA stairs on a flipchart or show the PPT slide available in the PPT slide deck.

#### **Explain:**

- A is the first step and F is the highest on the stairs
- In B-D-F the facilitators will read out some points for reflection for the participants
- We will go through reflection point by reflection point. Some attributes will have only one reflection point and some will have more.
- Facilitators will start reading the reflection points for level B. If participants agree that they meet all criteria we move to the next level and read out the reflection points in D. If participants agree that they meet the criteria also in D, we will move on to F.
- If the group feels that some but not all of the criteria in any of the levels B-D-F are met, you will go down one step and land on level A, C, E
- If none of the criteria in F are met, you will land on D and if none of the criteria in D are met, you will land on B.
- Remember that A does not mean no capacity, it just means that the criteria in level B are not met

#### **Before starting:**

- Ask if there are any questions
- Say that you will start with a practise round to help participants see the logic better
- Let participants know the total number of attributes that will be covered so they know what to expect

### Facilitating the BOCA matrix dialogue

#### **Methodology:**

The BOCA 2.0 is designed to be a self-reflection for the branch. As a facilitator it is your role to help guide a conversation, not judge or steer the outcome of the discussions.

- The facilitators take turns reading out the questions related to each attribute and then take the participants through each of the reflection points to determine the score by consensus.
- Pose the reflection points like questions rather than indicators to the participants and encourage them to reflect on these as a group
- Ask prompting questions to encourage a conversation and make participants share examples rather than just saying yes in response to a reflection point. Ask for example: *How do you normally do this? What are some examples of this?* Especially for the higher levels. More detailed suggestions for follow up questions are available in the Explanatory notes.
- Start with the first attribute on Fundamental principles. Allow the pace to be a bit slower to ensure everyone understands the methodology. Ask if there are any further questions.

- Continue with the rest of the matrix
- For each completed attribute, record the branch's consensus score as follows and put it up on the BOCA tree next to the topic discussed:
  - A: Red
  - B: Orange
  - C: Yellow
  - D, E, F: Green

**Note for Attribute 26 “Applying agreed quality standards”:**

- Prior to the matrix exercise decide as a National Society which “quality standards” that branches should be aware of and adhering to that you want to discuss during the workshop (e.g. PMER guide, financial procedures etc)
- During the matrix exercise, inform participants all the standards selected by the NHQ, and ask the questions in the matrix, referring to the chosen documents

**Facilitation tips:**

- Write down any concrete ideas that come up during the discussions on post-its and put these up in the parking lot
- Take a break or do an energizer if you feel that energy levels are starting to go down
- It is always possible to skip a question and come back to it later.
- Keep in mind that the first questions may take a little longer. Once the participants have become accustomed to the format, each question will generally go faster.
- If it feels like the group is not getting started, you can summarize the statements for the whole attribute and ask them to reflect individually first and then go back to the discussion
- Refer to the Explanatory Guide if needed to help explain the different attributes

**Reaching consensus:**

Reaching consensus means getting the group to reach a common opinion and make a joint decision on the final score for each attribute. As a facilitator, you should be careful not to steer the participants towards a particular outcome.

When participants have different opinions about the level or individual statements, it is particularly important to provide examples and well-founded arguments. In most cases, the group will reach consensus after some discussion. However, sometimes you as a facilitator will need to provide support if the group gets stuck. For example, by asking questions such as: *“Do you agree with this part of the statement?” “Please give an example”. “When was the last time this happened?”*

Remind participants that the most important thing is not the scoring itself but about the discussion and getting the overview of where extra work might be needed.

If a certain question is difficult to agree on, you can pause it and move on to the next and then revisit the paused conversation later.

Analysis and prioritisation	
Objective:	Visualise the current status of the branch based on the discussions during the BOCA matrix exercise and agree on priorities to work towards.
Participants will:	<ul style="list-style-type: none"> <li>• Get a common picture of the branch's current strengths and gaps</li> <li>• Understand how the different elements connect with each other</li> <li>• Start reflecting on root causes for existing challenges</li> <li>• Make priorities for further work</li> </ul>
Time:	30-45 mins

## Analysis and Prioritisation

### Methodology:

#### Step 1: Gathering around the tree

This step will help participants visualise where they are today and how different elements are connected. Gather the participants around the tree. The facilitators ask questions to help guide a discussion amongst the participants.

- Invite participants to look at the branch tree with sticky notes showing the current situation.
- Explain the colour coding of the post-its (A: red, B: orange, C: yellow, D-F green)
- Ask: *“What story does this picture tell us about the branch today?”* and open up for the participants to reflect in plenary.
  - To further deepen the conversation, you can ask prompting questions such as: *“Does anything surprise you here?”*, *“What does it tell us when the leaves are green?”*, *“What does a yellow leaf tell us?”*, *“What happens to green leaves if you do not water them?”*
- Encourage discussion of patterns (e.g. many reds in governance, mostly greens in services), what does this mean?
- Encourage participants to reflect on how the different element are connected. E.g. If you have gaps in mobilising local resources as well as in how you practise the auxiliary role, what does this mean?
- Ensure that the discussion is not only focusing on gap areas, but also the strengths observed.

#### Step 2-1: Root cause reflection

When you feel that the participants have a shared picture of the current state of the branch, move on to ask probing questions to help the group reflect on what could be some of the reasons behind the challenges. This is supposed to happen in an organic flow, not a separate discussion.

- Ask: *“Why do we think this situation looks like this? What are the main reasons?”*
  - *How do the different areas connect? Why is this happening? What is behind these situations?*
- Capture key reflections on post-its and put these up under the BOCA tree where the roots would be

#### Step 2-2: Prioritisation through voting

The purpose of the prioritisation is to collectively define 2-3 areas to work on further. Prioritisation is done by element (BOCA tree branch) and not by individual attributes.

Sometimes, the root-cause reflection already takes the participants to a place where they have started identifying priorities. If participants have already naturally defined a manageable number of core issues they want to work on and priorities during step 2-1, the facilitator can decide to skip the voting and move directly to Step 2-3.

If you decide to go ahead with the voting:

- Each participant receives 3 votes (stickers).
- Ask: *“Looking at your tree, and going back to your own definition of a strong branch, and what we have been discussing during the workshop, where should we focus our efforts as a branch?”*
- Remind participants that they can also choose to prioritise areas that are already strong, not just focus on the gaps
- Encourage thinking about:
  - Which areas are most important for our branch?
  - How can we build on our strengths to also work on some of the identified gaps?
  - Are there connecting areas that could be addressed together?
  - Where can we make the biggest difference by working together?
  - Where can we take action ourselves (without waiting for others)?

### *Step 2-3: Reviewing results*

- As facilitators, tally the votes and highlight the top 2–3 areas that received the most votes.
- Confirm with the group: *“Are we comfortable that these are the areas we should prioritise?”*

### **Facilitation tips:**

- Voting can be done by secret ballot if you think that results will otherwise be influenced by one or two participants
- Keep participants focused on identifying a few clear priorities (not solving everything).
- Encourage balance: something urgent, something with big impact, and something achievable.
- Avoid letting the conversation drift into designing actions or solutions at this stage—that comes in the roadmapping step.

Roadmapping	
Objective:	Participants come up with a roadmap with some concrete next steps and some longer-term milestones, identifying support needed, and decide on how to inform others in the branch of the roadmap
Time:	60 mins

## Roadmapping

### Methodology:

#### Step 1: Visioning exercise

- Invite everyone to close their eyes and imagine the branch 3 years from now.
- *Say: "It's [Month/Year], three years from today. You've worked on your key areas you defined and prioritised. What does your branch look like now? What are you able to do then that you are not able to do now?"*
- Participants write what they imagine on sticky notes and share their vision in plenary.

#### Step 2: Planning the next steps

- Ask the participants to gather around a table or other suitable space to work on their roadmap. Option to take notes on flipcharts or on a laptop, using the Branch Development roadmap template
- *Say: "Building on the Vision shaped by the team, what are the things you need to do as a branch in order to achieve this?"*
- Encourage the participants to think of steps and actions they can do themselves with existing resources
- Give the participants a flipchart with the following questions to help guide the discussion:
  - What are the root causes behind your challenges that you wish to address?
  - What are some things you can do differently? Or do more of?
  - What are three concrete actions that you could take right now?
  - What are three actions you would like to do in the longer term (1-3 years)?
  - What support would you need, and from whom?
  - How will you follow up and inform the wider branch of the priorities?
- If you have captured any concrete ideas from the discussions earlier in the parking lot, give these to the group so they can reflect these in their roadmapping
- When the group has finished their roadmap, wrap up the exercise by having the participants present their key milestones in plenary.

### Facilitation tips:

- Even though this is not about detailed planning, encourage participants to be as concrete as possible and avoid generic statements such as "raise more awareness". Instead, tell participants to try to define who would be the target group for such a campaign and what they need to do differently to reach this group if that has previously been a challenge.
- Encourage participants to think in terms of achievable steps ("what can we start with?").
- If needed to inspire the thinking, you can encourage the participants to reflect on:
  - Is there something that you have tried previously that didn't work? How can you work on it differently
  - What are some small steps you can take starting from next week to make changes happen?

## Documenting the BOCA workshop and roadmap

- The workshop results, prioritisation and initial ideas for action will be captured by the branch in the Branch Development roadmap template

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- If the NS/Branch already has an annual plan or other planning architecture, the defined actions should be integrated with existing plans, and the group should agree how this will be done
  - The group will agree on how the information from the workshop will be shared with the rest of the branch
  - The BOCA tree will remain in the branch for future discussions
  - A reporting template is available for facilitators to capture the discussions and priorities during the workshop

<b>Wrapping up and closing of BOCA workshop</b>	
Objective:	Summarising the two days and explain the next steps
Time:	15 mins

### **Wrapping up and closing of BOCA workshop**

#### **Methodology:**

- Congratulate the branch for completing the BOCA exercise and emphasise that the BOCA tree and Branch Development roadmap belongs to them. Explain how the report will be shared with NHQ.
  - Explain how the NHQ will provide support to the branch and how the results will be used.
  - Explain any upcoming events or wider Branch Development initiatives in the National Society.
- Encourage participants to join the IFRC Branch Development Community: [Communities IFRC](#) where they can connect with peers from other National Societies, ask questions and share ideas and experiences.
- Ask the branch chairperson or another participant to summarise the key next steps and close the workshop.

## ANNEX: BOCA workshop resources

You may find all BOCA related resources available in the [Branch Development Portal](#). In particular, following will be used during the BOCA 2.0 Workshop

- [\[BOCA 2.0 Workshop\] Presentation slide](#)
- [\[BOCA 2.0 Workshop\] Sample Agenda for Participants](#)
- [\[BOCA 2.0 Workshop\] BOCA Matrix](#)
- [\[BOCA 2.0 Workshop\] BOCA Tree](#)
- [\[BOCA 2.0 Workshop\] Branch Development Roadmap](#)
- [\[BOCA 2.0 Workshop\] Workshop report template](#)

In addition to this guide, you can access

- [\[BOCA workshop\] Explanatory notes for Facilitators](#) supports Facilitators with background information to clearly explain the BOCA matrix.