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PORTFOLIO JOURNEY BRIEF APRIL 2023

PORTFOLIO JOURNEY BRIEF APRIL 2023

[Portfolio approach]   [Portfolio approach]

URBAN MAKEOVER

ECONOMIC OPPORTUNITIES

Pragmatic function of a city:
Standard of living

How we spend
(quality x money) **=** **things, dwelling, work, infra**

INNOVATIVE APPROACHES

Applying systems approach to complex urban challenges using **portfolio of discovery** and **strategic options**

How we understand development challenges from multi-perspectives

VIBRANT COMMUNITIES

Existential function of a city:
Quality of life

How we spend
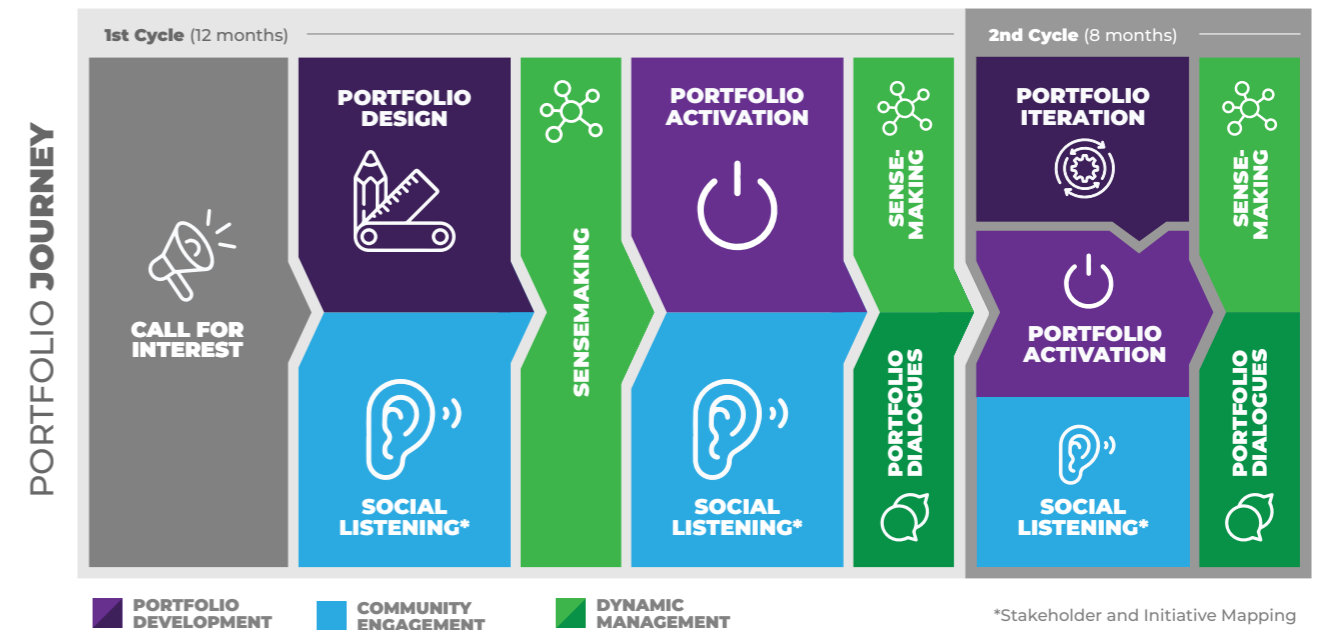(quality x time) **=** **experience, leisure, culture, values**

What is the M4EG?

The Mayors for Economic Growth (M4EG) is a joint EU & UNDP initiative to support Mayors and their teams in the Eastern Partnership region. Through monetary and technical resources, networking and learning opportunities, the M4EG seeks to explore new trajectories of growth to make towns and cities resilient and attractive for people and investment. Recognizing there are no quick fixes for complex challenges, the M4EG takes a 'hyperlocal' and whole-of-place approach, working alongside Mayors and their teams. Find out more on how our municipalities are investing in continuous learning, experimentation, and collaboration to be more #futureready: www.eum4eg.com.

What is the Portfolio Journey?

The Portfolio Journey is a two to three-year long program for in-depth learning and implementation under the M4EG. This program is based on systems thinking, which uses a "portfolio approach" to address complex problems that cannot be solved through traditional project management methods alone. The participating municipalities receive implementation funds of up to €225,000, and each received dedicated support from Chora and UNDP to assist with portfolio design, activation/implementation and dynamic management.

PORTFOLIO **JOURNEY**

1st Cycle (12 months)					2nd Cycle (8 months)	
CALL FOR INTEREST	PORTFOLIO DESIGN	SENSEMAKING	PORTFOLIO ACTIVATION	SENSE-MAKING	PORTFOLIO ITERATION	SENSE-MAKING
	SOCIAL LISTENING*		SOCIAL LISTENING*	PORTFOLIO DIALOGUES	PORTFOLIO ACTIVATION / SOCIAL LISTENING*	PORTFOLIO DIALOGUES

- PORTFOLIO DEVELOPMENT
- COMMUNITY ENGAGEMENT
- DYNAMIC MANAGEMENT

*Stakeholder and Initiative Mapping

The portfolio approach is a complementary method that helps decision-makers navigate problems that require a more comprehensive and interconnected perspective. It is a learning tool for achieving transformative change within a city or town. Challenges such as poverty, inequality, unemployment, and air pollution are all outcomes of interconnected systems that demand new types of policy design and implementation for national and local governments. Designing responses with a systems approach requires dedication, new capabilities, and new and alternative funding modalities to move beyond single projects toward more connected interventions.

Systems thinking originates from the 1950s and has since been widely adopted by both private and public decision-makers when dealing with complex and persistent problems that cannot be solved with technical or single-sector approaches alone. In the context of climate related challenges in cities, various new initiatives embracing systems have emerged over recent years and which the M4EG Portfolio Journey is learning from, including NetZeroCities, Climate KIC's Deep Demonstrations, New European Bauhaus, and Viable Cities. In 2020, UNDP developed an urban transformation framework called the Agora stencil, together with Chora Design, to apply systems-wide portfolio approach.

Introducing the Portfolios

Spotlight Cohort 1

[Portfolio approach]

Who are the cities?

10 cities and towns are currently part of the Portfolio Journey under the M4EG at different stages of implementation:

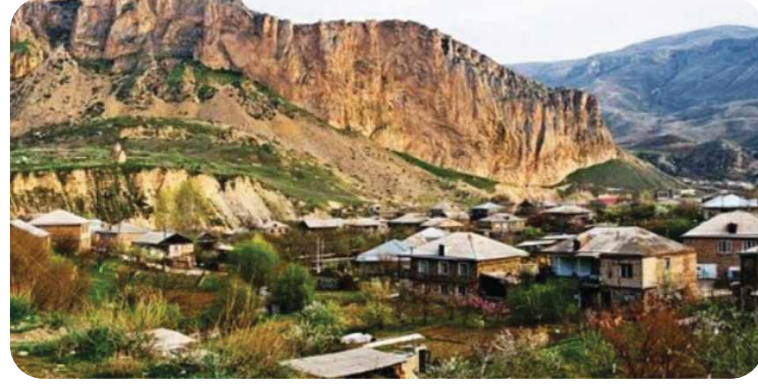|	Local authority	Country	Population	Portfolio mission/focus	Stage (April 2023)
1	Areni	Armenia	11,309	Sustainable Tourism	Initial seed portfolio activated (up to 70,000) w/ dynamic management protocol in place
2	Gyumri	Armenia	116,800	Cultural Tourism	Option proposal finalisation and signing of the fund agreement ongoing
3	Kapan	Armenia	43,190	Participatory Community Wellbeing	Bootcamp finalized in early April, positions designed along with their first options to be implemented in late spring 2023
4	Icherisheher	Azerbaijan	3,000	Smart Old City	Social listening and stakeholder inputs ongoing, portfolio design bootcamp in May 2023
5	Khirdalan	Azerbaijan	95,200	Creativity and Entrepreneurship	Portfolio design finalized, activation of initial option implementation starting in spring 2023
6	Kutaisi	Georgia	129,305	Eco-Smart City	Initial seed portfolio (up to 70,000) activated w/ dynamic management protocol in place
7	Batumi	Georgia	173,745	Start-up Ecosystem	Initial seed portfolio activated (up to 70,000) w/ dynamic management protocol in place
8	Ceadir-Lunga	Moldova	19,401	Energy Transition	Initial seed portfolio (up to 70,000) activated w/ dynamic management protocol in place
9	Mykolaiv	Ukraine	474,751	Deep Blue Transformation	Portfolio focus designed, positions and option proposals ongoing, implementation from late spring 2023
10	Ternopil	Ukraine	224,134	TBC - Response & Renewal	Mayor and team chose to pause portfolio kick-off until spring 2023

Introducing the Portfolios

Spotlight Cohort 1

Areni / Armenia

Sustainable Tourism

From underdeveloped infrastructure to well-developed diversified tourism and an attractive community

Areni faces challenges linked to insufficient infrastructure and underdeveloped waste management, resulting in environmental pollution, and negatively affecting tourist activity in the area. The specific area of interest the city has decided to address through this portfolio is sustainable tourism, both from an economic and environmental perspective. The portfolio intends to attract and direct additional financial resources to the community to renew parts of its local infrastructure and contribute to the diversification of the local economy by exploring possibilities of interconnected value propositions, as well as exploiting new niches and alternative tourism offerings, such as eco, gastro and adventure tourism.

Intended effects:
• Shared ambition and strategy committed to transformation and mobilization of all stakeholders towards the creation of inclusive, innovative, and resilient tourism.
• A clean, green, and safe environment for visitors and residents across generations.
• A diverse, connected, sustainable, and attractive tourism economy that attracts funding towards infrastructure renewal and other benefits applied to Areni's community as a whole.

Areni team did an extended outreach as part of the design process, including the youth, guest house businesses, wine factories, homemade winemakers, and artisans.

"Thanks to the program I understood that there is no problem without any solution, just that we need to look at the problem from different angles."
Norayr Grigoryan, Areni Community Administration

Areni Portfolio
Sustainable Tourism

Portfolio Position 6
eSENSE FOR TOURISM
Feedback Platform: Real-time information is crucial for adaptive value chains in sustainable tourism. It helps businesses understand evolving customer demand and respond effectively. Developing and testing different feedback mechanisms create space for engaging the tourists more actively in the communities they visit and the service provision they experience, laying the gr•undwork for stewardship and responsibility.

Portfolio Position 5
IMPACT INVESTMENTS AND NEW FINANCIAL INSTRUMENTS FOR COMMUNITY FUNDS
Saas Platform for Tourism & Hospitality businesses: Proof of concept and subsequent creation of a stand alone commercial company that runs a Hospitality SAAS Platform. All hospitality and tourism businesses in the region as well as businesses that provide complementary services need quality marketing, coordination & scheduling, financial, design and business development/new product design capabilities.

Portfolio Position 4
CREATING SUPPLY - ENABLING LOCAL BUSINESSES & HOUSEHOLDS TO DESIGN AND DELIVER ATTRACTIVE NICHE PROPOSITIONS
Cultural Gems: Ethnographic interviews to surface, collect and record interesting local stories, legends, experiences, knowledge, songs/music, poems, sayings etc about the area.
Option: Wine Festival - new offerings: Proof of consent to design and potentially launch 2-3 new experiences at the Areni wine festival with the goal of testing specific supply/demand dynamics which can generate additional income for the community.

Portfolio Position 1
COMMUNITY ALIGNMENT AND SHARED PORTFOLIO STEWARDSHIP
Community vision: Conduct a series of conversations / workshops /events with different stakeholders to collect information and start building a picture of how people see the future of tourism development in their communities.

Portfolio Position 2
ARENI'S IDENTITY AND BRAND NARRATIVE
Brand diagnostic & Needs assessment: Gather data on the current Areni region presence and sentiment - how do tourists that have visited and others that have not see the Areni region, what do they appreciate, what are key qualities they talk about and what is their sentiment.

Portfolio Position 7
LEADERSHIP CAPABILITIES FOR THE ARENI ADMINISTRATION
Capacity building Learning program: Focuses on establishing a learning program for the Portfolio team in order to prepare them for dynamically managing their portfolio and extending their capabilities to be able to act as an orchestrator, convener and community manager.

[Portfolio approach]

Batumi / Georgia

Start-up Ecosystem

From talent drain into talent retention and knowledge-driven economy

A key challenge for Batumi rests on an economy mainly dependent on tourism - a sector which predominantly hosts seasonal activities and offers low-skill service jobs during summers. Talented youth (14-29 years old) look therefore for high quality education and diverse work opportunities in Tbilisi or abroad, contributing to a high emigration rate in the city. Despite a high demand for managerial and entrepreneurial skills, the higher and professional education systems are not well orientated towards the needs of the city's labor market. Given these challenges as well as the need to diversify the city's labor market with a focus on high-skilled knowledge work and improve access to innovation and startup activities and networks, the specific area that the City Hall has decided to address through the M4EG Urban Makeover portfolio is Startup Ecosystem Development.

Intended effects:

• Diversify and broaden Batumi's talent pool by retaining talented local youth and attracting external high-skilled talent.
• Contribute to a renewed urban identity by making Batumi Georgia's second startup capital.
• Ignite interest, develop startup-savviness and encourage a culture of entrepreneurship and innovation with a particular focus on youth.
• Enable the City Hall to become an enabler of Batumi's startup ecosystem.

"I was very interested in engaging stakeholders, interviewing private sector representatives, and sharing their expectations and experiences (social listening and sensemaking) which gave us the opportunity to choose the direction of the portfolio based on a diverse discussion, and showed us the different ways and approaches to the challenges, that can be replicated in the municipality's other activities."

Rusudan Zhozhadze, Municipal team of Batumi

Batumi Portfolio
Start-up Ecosystem

Portfolio Position 8
START-UP INFORMATION HUB
Start-up Information Portal: Design a web platform that serves as an information hub for both investors and young entrepreneurs interested in Batumi. A tool for the Municipality to be "present" online and attract and engage with stakeholders.

Portfolio Position 3
PHYSICAL SPACES OF INTERACTION
The New Space: Create a new physical space different than all existing start-up spaces in Batumi, that has an informal vibe, is attractive in terms of location and ambience for young talent. The space will be enabled by the Municipality but designed and run by an independent start-up coalition.

Portfolio Position 4
CONNECTING BATUMI
Networking the Ecosystem: Establish a pulse of networking events and activities that connect existing communities and attract new energy to Batumi.

Portfolio Position 6
CITY HALL AS ECOSYSTEM ENABLER
City Hall is Learning: Design a learning program for Batumi City Hall core team to acquire knowledge on start-up ecosystems, municipalities' roles in them. This program will include a study trip, four+ workshops with selected start-up expert speakers.

Portfolio Position 2
START-UP ENTREPRENEURSHIP EDUCATION
Start-up University Batumi: A start-up/entrepreneurship culture plug-in in the Batumi formal education system. An entrepreneurship and start-up course at a Batumi University. Make start-ups a part of the formal university programs, for example within the Business School.

Pre-accelerator program

Portfolio Position 1
SHIFTING NARRATIVES
Narratives Research: Research project on dominant narratives pertaining to a start-up ecosystem among local youth aged 14-29 years.

[Portfolio approach]

TEAM | **Batumi:** Archil Chikovani, Rusudan Zhozhadze, Shorena Paghava, Natia Miminoshvili
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Batumi's Start-up Ecosystem Development portfolio explores dominant job narratives, spaces where youth are educated and empowered to become start-up entrepreneurs, physical spaces of interaction for talent, and building connections with mature start-ups.

Ceadir-Lunga / Moldova
Energy Transition

From an import-based and extractive energy system to an independent, affordable and renewable energy set-up

The city of Ceadir-Lunga is an important and historical industrial city since the Soviet Union times. Ceadir-Lunga has historically been a significant industrial city closely connected to the Russian economy ever since the Soviet Union. Its heavy reliance on energy imports from Russia has led to a sharp increase in energy prices, which is having a significant impact on the city's residents. This, combined with high unemployment rates, low incomes, and outdated energy efficiency standards, has placed a considerable burden on households, putting individual and community well-being, access to basic needs, and social inclusion at risk.

To address these challenges, the municipality has decided to transition towards an affordable and renewable energy system that prioritizes the needs of its citizens. This entails moving away from an import-based and extractive energy system towards an independent, affordable, and renewable energy setup that empowers citizens. The municipality aims to create a sustainable and inclusive energy future, take a holistic approach to homes as a key driver of the energy transition, and provide relief and inclusion for low-income households.

Intended effects:
• Inclusive and sustainable energy future.
• Holistic approach to the "home" as a key agent of the Energy Transition.
• Relief and inclusion of low-income households.

"Through the portfolio approach, we identified the problem of the city and found solutions. The process has enabled us to apply new and innovative methods for greater impact and sustainability"

Oleg Fazli, Municipal team of Ceadîr-Lunga

Ceadîr-Lunga Portfolio
Energy Transition

[Portfolio approach]

Portfolio Position 3
ENERGY X KNOWLEDGE
Municipality-led transition: The aim of the project is to train existing experts in the field of green energy in the municipality, by organising further training courses and exchanging experiences with other cities or countries.

Portfolio Position 1
ENERGY X LOW INCOME
Smart Green [Street] Lights: Implement a proof of concept using a selected street and intersection of an optimised street light operation system that uses renewable energy.

Energy Savviness - awareness campaign: Create and run an information campaign targeted at households to highlight alternatives to traditional and high cost technologies, energy solutions and habits.

Energy Transition Fund: Create a tool to support the socially disadvantaged by setting up a support fund for the population.

Portfolio Position 2
ENERGY X HOME
Kindergartens in Transition: Promote energy efficiency principles and to build real-life use cases and examples for transitions that work. Participating Kindergartens will receive a tailored training and information approach and a complementary energy audit relevant to their house and energy use category. Building on this they will propose their own energy transition plans in collaboration with families and neighbours.

Kutaisi / Georgia

Eco-Smart City

From an old industrial center to an Eco Smart City for urban transformation

Kutaisi has been facing numerous challenges in recent years. Its economic importance has been on the decline, leading to a brain drain and a lack of opportunities for talented youth. The tourist industry has been struggling to recover from the COVID-19 pandemic, which has put a strain on the city's economy and caused a decrease in population due to migration. In addition to these challenges, the city is grappling with environmental issues due to its past industrial activities, which have led to air pollution and other climate-related problems.

To address these challenges and promote environmental resilience, the city has decided to use the Portfolio process. This approach will support its efforts to transform into an Eco-Smart City that respects its environment and resources and is equipped to deploy innovative green solutions to address urban challenges in line with the city's Master Plan.

Intended effects:
• Become an attractor for stakeholders with sustainable interest and agendas.
• Engage with Kutaisi's citizens, visitors, and businesses to become active stewards of the environment and urban-natural ecosystems and resources.
• Inform and lead an agenda for sustainable policies and incentives at a country level.
• Enable sophisticated and responsible management practices at municipal level in order to lead by example.

"With the active participation of citizens, it was possible to identify a common challenge for the city - improving the condition of the living environment. The participatory process also showed us that solving this issue was impossible with traditional methods and required a complex approach. This led to the vision of the transformation of Kutaisi to an Eco Smart City."

Irakli Goglichidze, Municipal team of Kutaisi

Kutaisi Portfolio
Eco-Smart City

Portfolio Position 1
SHARED IDENTITY
Citizens 4 Green Kutaisi: The objective of this option is to engage Kutaisi citizens in the Smart Eco strategy and create a continuous flow of information between initiatives that are happening and the citizens. This option aims to establish a structure for effective communication in support of the information exchange and awareness needs of the rest of the portfolio as well as develop the various elements needed for running coherent co munication campaigns with citizen participation.

Portfolio Position 3
LIVING LABS
Smart Waste: This option is a Proof of Concept applied to a limited number of selected waste containers in different parts of the city to learn about technology and waste management.
Green mobility - This option will test two different methods for encouraging citizens to adopt electric vehicles.
Energy Efficient Building - Open air lab: This option aims to transform one of the existing municipal buildings into a demonstration of energy efficiency and sustainability solutions.

Portfolio Position 5
MUNICIPALITY AS KNOWLEDGE HUB
Learning and exchange program Blueprint: This option will develop a proposal for a learning program to support the municipality in developing new skills and capabilities that enable them to manage and expand their portfolio.

Portfolio Position 2
INFORMATION RICH STORIES
Kutaisi Eco bot and app: Establish an information sharing platform that can engage with different citizens/ audiences to be able to deliver real time information that informs their decisions with more sustainable choices, such as how to sort waste, the nearest empty waste container, green route options in the city, etc.

Portfolio Position 4
TALENT 4 URBAN INNOVATION
Academy for Applied Eco Innovation - Proof of concept: This option is a proof of concept of a new earning program focused on sustainability. The PoC will focus on developing and delivering a program of courses around energy and buildings to a selected group of youth in several age groups (pre-teens, teens and students).

Portfolio Position 6
NEW GREEN VALUE CHAINS/ EXCHANGES
Kutaisi **"Eco wallet":** This Option proposes a first implementation of a local e-currency and wallet designed to be used for sustainability and environment related exchanges. The first used cases would be to support the implementation of the other Seed Options - notably Options 3 and 4. The currency would be used both as a behavioural nudging mechanisms, rewarding sustainable actions and behaviour but also to purchase "green" services, such as green parking.

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[Portfolio approach]

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Kutaisi's Eco-Smart City Seed Portfolio includes: creating a shared vision, sharing sustainability stories, showcasing solutions through living labs, talent programs, becoming a Knowledge Hub, and exploring green value exchanges. Six additional positions will be activated in the next iteration.

Introducing the Portfolios

Cohort 2

Gyumri / Armenia
Cultural Tourism

Gyumri, the second-largest city in Armenia with a population of 112,100, is an urban municipal community and the administrative center of Shirak Province. Known as the "culture capital of Armenia," it boasts a rich history, heritage sites, cultural life, and unique customs. The challenges Gyumri faces are linked to the surge in tourist growth observed since 2018, which the city was not prepared to accommodate. Despite facing growing pains related to cultural and tourism development, the city has successfully reactivated its former cultural and touristic life post-covid pandemic. The city team decided to use the Portfolio process in developing resilient and equitable cultural tourism. Its vision is to turn Gyumri into an international cultural destination, benefiting local communities, visitors, and the preservation and replenishment of its cultural assets in the long term.

Intended effects:
• Gyumri becomes a known destination for cultural tourism around the world.
• The Municipality becomes the owner and manager of the comprehensive cultural tourism strategy in Gyumri.
• Visitors have positive and memorable experiences throughout their entire journey to and in Gyumri.
• Gyumri has the necessary infrastructure and conditions for the preservation and continues replenishment of its cultural capital.

Kapan / Armenia
Participatory Community Wellbeing

Kapan is a town in southeast Armenia, serving as the administrative center of the Kapan Municipality as well as the provincial capital of Syunik Province. The economy of Syunik is mainly based on the industrial sector, including mining, building materials production and food-processing. After initial sensemaking and community listening, the team chose to focus their portfolio on creating a community where the well-being of all residents is at its center.

Intended effects:
• Kapan has an effective local authority that provides systemic solutions to its residents and attracts and manages external resources.
• Kapan has diversified its economy to better serve the needs of its residents.
• Kapan has a strong supportive social fabric with residents has the agency to shape their community.

Khirdalan / Azerbaijan
Creativity and Entrepreneurship

Located in Azerbaijan's Absheron District right outside of Baku, Khirdalan gained the status as a city in 2006. Despite being home to numerous industrial enterprises and factories, it gradually became known as a "sleeper town" of Baku. Since the municipal team came into power after the 2019 elections, they have strived to transform the city's image. Through the portfolio design phase, the team refined their focus on transforming Khirdalan to be a city that attracts creative entrepreneurship to supplement and in the long run possibly diversify the existing industrial factories. The aim is to generate business ideas and create an enabling environment for them to be converted into successful ventures, resulting in a creative and sustainable Khirdalan.

The municipal team devised four positions and options to be implemented in the initial stage of the transformation process. These include:

• Knowledge Generation - A series of a first of a kind townhall meetings to understand the current interests and needs of different industrial sectors and stakeholders.
• New Identity, New Khirdalan - A series of participatory workshops with local youth, facilitated by artists, in partnership with industry actors in Khirdalan, culminating in an exhibition for the public.
• Talent Matching: Existing Youth to Existing Industry - A one-off pilot job fair experiment to bring together companies from Khirdalan's industry and job seekers.
• YOUTH-Entrepreneurship Narratives - A series of 2-3 hybrid events featuring local heroes with a relatable socioeconomic background to inspire the target audience in selected physical locations in Khirdalan.

Icherisheher / Azerbaijan
Smart Old City

Icherisheher, also known as the Old City of Baku, is a UNESCO World Heritage Site that houses 4,000 residents within its 12th-century walls. This open-air museum, built in an amphitheater style across 22 hectares, sits atop a small hill on the Caspian Sea coast, surrounded by fortress walls measuring 8-10 meters high and 3.5 meters wide. With thousands of annual visitors, Icherisheher is a lively and captivating city with a long-term strategy to become a "Smart Old City" by preserving the site's spirit, protecting it from external pressures, diversifying and modernizing income generation through cultural assets, tourism and creative industries, and enhancing the quality of life for residents and visitors.

At present, the project team is investigating five potential areas for intervention at the seed fund stage. These include: Smart tech for city management, Cultural assets meet digital technology, Smart tourism, Creative Industry, and Community Development. The project team is interviewing various stakeholders to gather intelligence that will be utilized during the Portfolio Bootcamp scheduled for May 2023.

RESPONSE&
RENEWAL
Cohort UKRAINE

In end of 2021, Mykolaiv and Ternopil in Ukraine were selected for the Portfolio Journey. Both city teams began the journey in early 2022 with initial stakeholder mapping, social listening and sensemaking as part of designing the portfolio focus. However, the work was interrupted by Russia's war of aggression on Ukraine in late February 2022. The Mykolaiv municipality requested that the work be resumed in December 2022, while the Ternopil city team has postponed their active engagement until spring 2023. In response to the changed circumstances, UNDP modified the existing Agora Urban Transformation Stencil to shift its focus to the new realities: response, resilience, and renewal.

Mykolaiv / Ukraine
Deep Blue Transformation

Located in the South of Ukraine, on the banks of the Pivdennyi Buh River and the Inhul River, Mykolaiv is the capital and industrial center of the oblast in the South of Ukraine. Its historical focus on ship-building and maritime logistics has shaped the city's identity, where before the war, Mykolaiv ports served 23% of Ukrainian maritime logistics, 80% of alumina exports and hosted 5 large ship-building enterprises.
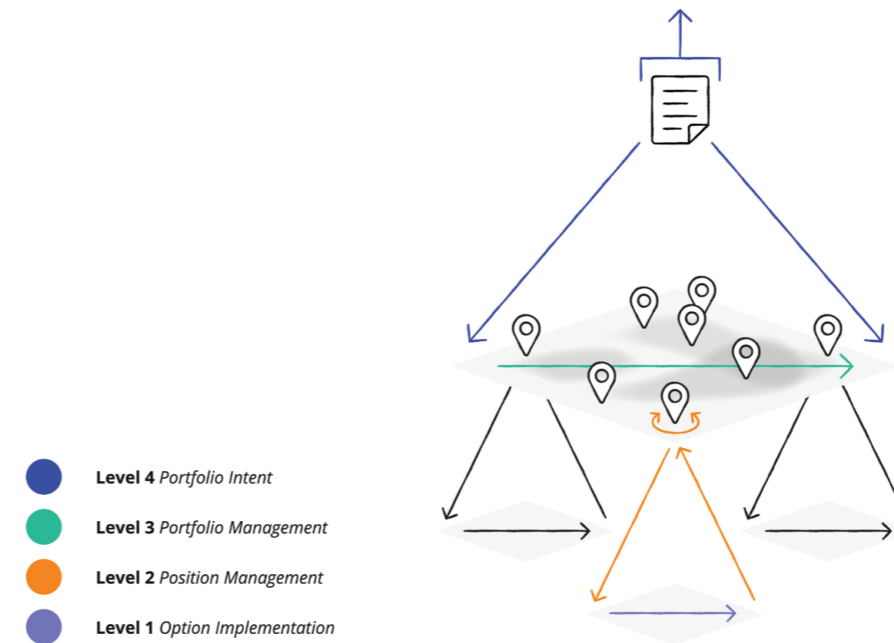
Wilson CenterThe Russian aggression on Ukraine has had a severe impact on the city. Mykolaiv was surrounded by the Russian army, putting it on the front line for eight months until Ukraine liberated the adjacent part of the neighboring Kherson oblast. Currently, the city is at high risk of remote missile attacks and bombings, and the ports and maritime routes remain blocked. The war has had a significant impact on the city's population, with 50% of residents leaving in search of safer living environments, leading to a surge in the unemployment rate, as many enterprises have also evacuated production facilities and labor force. The city has sustained substantial damage from Russian shelling, damaging more than 8,000 objects of civilian infrastructure, including residential buildings, schools, hospitals, and other facilities. The war context continues to be the key driver for the future of the city. On an organizational and personal level, the war creates conditions of uncertainty about the future and reduced capacity to plan. Facing multiple uncertainties and pressing needs, Mykolaiv City Administration will through the portfolio approach, leverage the maritime industrial identity of the city which is expected to facilitate continuous development of its economy, social, technological, and environmental systems.

Intended effects:
• Mykolaiv to become a dynamic economic regional center to attract people and investments.
• Actively involve and engage citizens, academia, and private sectors in recovering and building forward its economy and environment.
• Support Mykolaiv as a city of green and blue transition hub through R&D, innovations, and sustainable economy measures.

How are the portfolios managed?

The first of its kind at UNDP, the Dynamic Portfolio Management Framework was developed together with Chora to help municipalities manage their portfolios in flexible and adaptive ways, and hence acts as a concrete alternative to standard project management. The framework requires monthly Learning Logs to be filled by city teams, capturing activities and lessons learned for each option. Quarterly, bi-annual, and annual Sensemaking sessions are run within the municipality teams and with local stakeholders to inform necessary changes in implementation and direction of the portfolio. The practice captures intelligence that portfolios are producing on which solutions are working and inducing change and can be utilized to inform policy-making and investment decisions beyond portfolios. Municipal teams are trained in dynamic management and sensemaking and provided with an online (Miro) dashboard to help them capture and manage changes in the portfolio, and support knowledge management practices.

● **Level 4** *Portfolio Intent*
● **Level 3** *Portfolio Management*
● **Level 2** *Position Management*
● **Level 1** *Option Implementation*

	Why	What	When	How	Who
4	Review and adapt the Portfolio's overall strategic argument	The object of Sensemaking is the portfolio intent	Yearly basis	The impact and rationale of the entire portfolio will be evaluated, which informs the potential iteration of the overall intent of the portfolio	Portfolio Lead drives
3	Make sense across the whole Portfolio to review and adapt the Positions	The object of Sensemaking is the entire portfolio	Half-year basis	All positions within the entire portfolio are brought together through the Sensemaking protocol to generate intelligence that could inform the iteration of the portfolio composition	Portfolio Lead drives
2	Bring Options and activities within a Position together to review and adapt them	The object of Sensemaking is individual positions	Quarterly basis	All options within the same thematic area of interest are brought together through the Sensemaking protocol to generate intelligence that both evaluates the learning value and informs the re-design of individual options.	Portfolio Lead drives
1	Collect ongoing information and learnings from an Option to manage the Option delivery dynamically	The object of Sensemaking is individual Options	Monthly basis	Learnings and insights are extracted from the on-ground Option experiences to be fed into the second level of dynamic portfolio management. The Option learning log is a tool designed to support the synthesis and documentation of these option-level learnings.	Option Lead drives

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The roles and responsibilities of the Dynamic Portfolio Management Framework by CHORA