



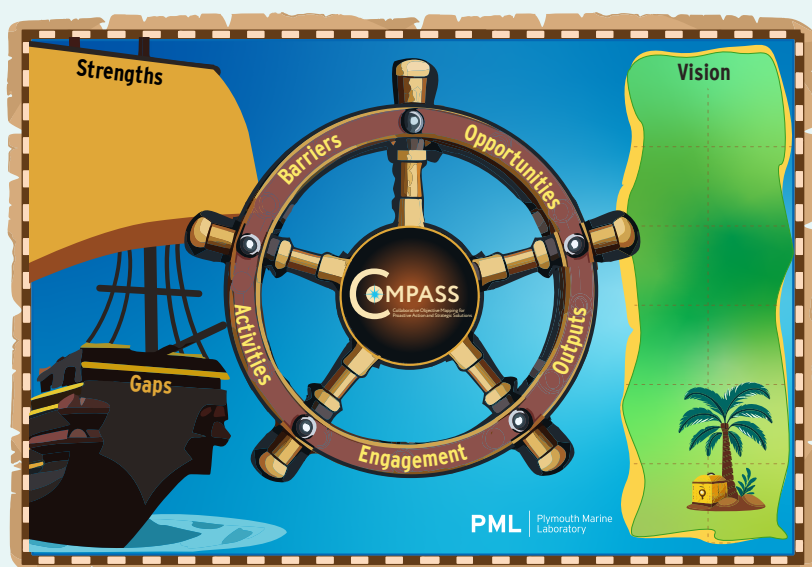
Collaborative Objective Mapping for
Proactive Action and Strategic Solutions

User Guide for Chairs and Facilitators

COMPASS is a structured planning tool that guides workshop participants through a step-by-step process to co-design a strategic and actionable plan for meaningful change. It helps identify strengths, weaknesses, barriers, and opportunities to develop a clear and logical path forward.

By integrating elements of Appreciative Inquiry, Theory of Change, and SWOT analysis, COMPASS provides a cohesive framework for effective impact planning. Designed for collaborative workshops, it facilitates co-development among key parties, ensuring that the resulting plan is both practical and aligned with shared goals.

Developed by Jen Lockett and Dawn Ashby at Plymouth Marine Laboratory (PML), COMPASS was originally created as a research impact planning tool. It has been successfully tested for this purpose and has since proven valuable as a broader planning framework, such as for team development.



[COMPASS poster - available to download here \(PDF 6MB\)](#)

COMPASS was designed with a nautical theme for a marine research setting but can be adapted to different topics. The elements are key to the process but the design can be adapted.

COMPASS is provided freely for use as a planning tool to support delivery of impactful activities.

**Please credit PML, share your experiences of using it and feedback your suggestions to improve it!
PML can provide training and facilitation, please contact: impact@pml.ac.uk**





Notes for Chair & Facilitators

We recommend appointing a chair and at least one facilitator to guide the session. COMPASS is most effective when combined with stakeholder facilitation techniques, ensuring clear direction, effective time management, and strong participant engagement.

At the start of the session the chair should remind participants:

- Everyone has an equal right to contribute, the group must agree to be respectful of each other.
- Write in a legible way, so text can be read by all.
- Add initials to post-it notes contributed so that everyone's individual input can be traced / followed-up if needed.
- To connect post-it notes across various sections (to denote a particular link between different contributions) add a symbol next to initials on those post it notes.
- Use different colour post it notes for each section if possible, in case some overspill the area.

Facilitators: Please give out different coloured post it notes to each person at the start of each section and the same number of coloured dots.

Equipment needed

The following equipment should be set up and ready before the session begins:

- Printed Poster(s) - ideally A0 on non-glossy paper (so can stick to it). Pre-fold poster, as per instructions below.
- A large number of sticky note pads in various colours
- Coloured dots pre-cut into strips of five
- Pens
- Timer

Preparing the groups

The ideal group size is 6-12 participants. While smaller or larger groups are possible, this range has proven most effective. If the event has a large number of attendees, participants should be divided into multiple groups, each led by a chair and a facilitator.

Groups can work on the same topic or different ones, depending on the workshop's objectives. We have found it most effective to tailor each group's focus to align with the purpose of the workshop, the planning activity, and the audience's scope. For example, groups might explore different objectives or focus areas within a larger project or examine various causes of a broader challenge. This approach helps cover more content, ensures relevance, and generates more meaningful insights.

It is also important to consider whether to assign participants to groups in advance. Pre-assigning groups can help ensure a balanced mix of organizations, sectors, and perspectives, leading to richer discussions and more well-rounded outcomes.

Preparing the space

The venue plays a crucial role in the effective delivery of the workshop. Key considerations include:

Sound - Choose a quiet space where all participants can hear each other clearly. Avoid placing groups too close together, as overlapping conversations can create distracting background noise.

Lighting - Ensure there is sufficient lighting, ideally natural light, so participants can easily read materials.

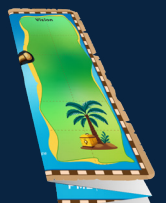
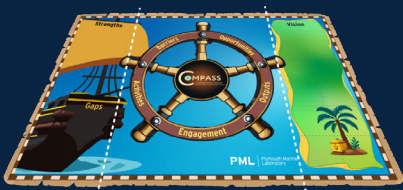
Space - Provide enough desk space for participants to gather around and engage with the poster. If space is limited, consider using upright boards to display posters while maintaining accessibility for collaboration.

Preparing the poster

1. With the COMPASS tool facing upwards, fold the poster in half.

2. Take one side and fold it back on itself, in half again, so the island is facing outwards

3. Do the same with the other side so that the ship is facing outwards but the wheel is still hidden.



Note: if displaying on an upright board you can create the same effect by covering the different sections with paper.



Instructions

STEP 1. Vision

Time required: approx. 15 mins

Poster display: island illustration

Set the Context

Begin by clearly articulating the purpose of the exercise and the topic / focus, along with any boundaries pertinent to the discussion. Presenting a well-defined question can guide participants effectively. For example: "What would local climate mitigation actions look like?"

Envision the Ideal Outcome

Encourage participants to write down their ideas of an ideal scenario or outcome related to the topic on a sticky note. Urge them to think expansively, imagining a 'utopian' vision without constraints.

Collaborative Sharing

Have participants place their sticky notes onto the island section of the poster. If the group or project already has established goals, use this opportunity to expand upon existing objectives or introduce new ones.

Facilitated Inquiry

Throughout the activity, the chair and facilitator should engage participants with probing questions to delve deeper into their suggestions. For instance:

"What specific policies could be influenced?"

"At which levels should these be implemented?"

"Would this involve policy design or execution?"

Thematic Organisation

As ideas are shared, the Chair and facilitator should collaboratively group sticky notes that exhibit recurring themes or overlaps. Position these thematic clusters in distinct sections on the island poster, ensuring clarity in their arrangement. To enhance understanding, consider summarising each theme with a brief descriptor on a separate sticky note placed atop the cluster.

Detail-Oriented Themes

Strive to define themes with specificity and tangible details. Broad or overly general themes can complicate subsequent steps in the process. Engage the group in discussions to ensure consensus on the thematic groupings, fostering a shared understanding and agreement.

Workshop participants at a PML impact event planning action to enhance the local environment (top) and an international project meeting agreeing key goals and pathways (bottom).

Optional Prioritisation Activity

If a wide range of vision themes have been captured it is important to focus the rest of the activity on just one theme (this can be repeated for different themes if required). This ensures the discussions that follow are focussed and constructive.

However, if all of the themes are closely connected, the group can move to step 2 and consider all other steps with the vision as one total entity they are aiming to achieve.

Selecting a Single Theme for In-Depth Focus:

- To democratically determine which theme to prioritise, distribute an equal number of coloured sticky dots to all participants (e.g., five dots each).
- Instruct participants to place their dots on the grouped themes (not individual stick notes), reflecting their perceived importance. They may allocate multiple dots to a single theme if they choose.
- The theme accumulating the most dots should be selected for the next steps, ensuring collective agreement on the focus area.

Tip: If there are themes identified that are unrealistic to achieve in a meaningful way then agree with the group if these can be 'put aside' before the prioritisation task to focus on an achievable outcome.





STEP 2. Current Situation

Time required: approx. 15 mins

Poster display: ship illustration

This step explores the strengths and gaps of the current situation i.e. what we have / do / is available.

Ask participants to think about what works well and place their post-its on the ship's sail.

At the same time ask them to think about the gaps and place these on the ship's hull.

Some things can be relevant to both strengths and gaps - these might include resources, infrastructure, political will, collaborations, data, tools, expertise, technology.

The Chair should then take a couple of minutes to summarise what has been captured back to the group.

STEP 3. Our journey

Time required: approx. 20 mins

Poster display: fully open

This section is to consider how we steer our ship from where we are now to our utopian island.

Begin by exploring barriers and opportunities to aid our journey.

What could prevent / delay / hinder us achieving our goals?

What opportunities (resources / policy drivers / interest) can be exploited / built on to help us get there?

The chair should briefly summarise what has been captured in the top part of the ships wheel back to the group and check agreement.



Workshop participants at a PML impact event planning action to reduce the negative effects of light pollution



STEP 4. Our journey

Time required: approx. 30 mins

Poster display: fully open

This is the planning stage, what will we collectively do/ deliver to get to our island.

Activities

What needs to happen to get from where we are now to our vision? (e.g. research, training, technology development). Consider activities which will enable the project to overcome barriers and capitalise on opportunities.

Engagement

Who needs to be involved to get us there? Who are the key players in making change happen / who has influence? Who do we need to keep engaged? Who needs to advise?

Outputs

What outputs are needed to be produced for others so they can use/engage with the research in a meaningful way? (e.g. data, training resources, policy briefs, publications, app / website).

Recap

Summarize back to the group what has been developed in terms of the impact goals (vision) and what actions are planned to get there.

STEP 5. Plenary Feedback

We conclude by inviting the Chair of each group to highlight the key points to encourage wider discussion. A suggested feedback table is available in the appendix for the Chair to capture notes at the end of the workshop to then feedback to the wider group. This helps to keep the feedback focussed and concise.

COMPASS Feedback from external participants

"It took less time and the agreement was more compelling. It also promoted a better interaction among participants, which was very good for those of us attending to an in person EC Meeting for the first time. Overall it is a very good tool." Cecilia Chapa, Universidad del Mar (Mexico)

"It fosters engagement by all participants, it does make it easier to identify activities required to achieve outputs". anonymous

"Sure (I would recommend COMPASS). Ideas are more efficiently compiled". Abed Hassoun, GEOMAR (Germany)

"The colourful, fun design of COMPASS helped to engage a wider section of community group members in the activity. Working with academics can seem daunting to some of our stakeholders but the COMPASS tool helped to level the field and give everyone a voice". Tors Froud, Plymouth National Marine Park (UK)

"COMPASS is a great tool for codeveloping a shared vision of what we want to achieve and a logical plan of how to do so that engages different stakeholders in a meaningful discussion, giving them crucial shared ownership of the output". Amelia Sturgeon, Tamar Estuary Consultative Forum (UK)

"yes, it is a nice tool to support inclusive and participatory discussions and to think about the end game of what we do, similar to the Logical Framework Matrix". annonymous

"Yes I would recommend. It was a useful tool for all participants to be engaged". anonymous



Appendix 1. Sample feedback table for Chairs

Group / topic	Impact Goals (Vision)	Activity (what?)	Engagement (who?)	Output (products)
	What will x aim to achieve in a real-world context for this theme?	Key elements of project e.g. research, monitoring, data gathering, development	Key people / groups / organisations that would need to be involved	What would be provided / produced e.g. data, app, network

Please share with us your thoughts and experiences of using the COMPASS tool.
 If you would like to talk to the developers please contact: impact@pml.ac.uk
 We are available to provide seminars, impact training and workshop facilitation.

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