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CLA TOOLKIT

DESIGNING AND FACILITATING LEARNING-FOCUSED MEETINGS

Introduction

A Pause and Reflect moment can take many variations (team retreats, individual time to read and process, after-action reviews, etc.), but one of the most common missed opportunities is meetings[1]. These include implementing partner meetings, stakeholder meetings, office meetings, all-hands meetings, portfolio reviews, mid-course stocktaking, or other recurring or one-off meetings. Using participatory learning techniques can help make meetings more efficient and effective, making the most of participants' time and moving the entire group towards its goals. This tool serves as a quick reference guide to help meeting organizers think through design and choose a technique that suits to their context. It also provides additional resources to explore.

Things to keep in mind when designing learning-focused meetings

As you get started in planning a learning-focused and participatory meeting, there are few key considerations to think through. Start conversations early and keep lines of communication open, knowing that the meeting design process is not always linear and assumptions will change.

The checklist below outlines some important questions to consider in collaboration with other key stakeholders within a team, office, or mission.

❑ **What are the objectives of this meeting?** Define the purpose, goal, or outcome of the meeting and its objectives (recognizing that meetings may have multiple objectives). Make sure there is alignment with other strategies or timelines that this meeting may feed into and ask "what will we do with the(se) outcome(s)?" Meeting objectives could include:

  o introducing and **sharing information, practices, innovations, and adaptations**;
  o addressing common **challenges and obstacles** geared towards **problem solving**;
  o strengthening capacity or addressing knowledge gaps;
  o finding and facilitating areas of **collaboration, efficiencies**, or **co-creation**; and
  o coming to **consensus** or collective **decision making**.

❑ **Plan with the next steps in mind.** Once objectives have been defined and there is an understanding of what will be done with the outcomes, make sure forward planning and/or programming is also being considered. What follow-up meetings might be needed? Who will manage action items that might arise?

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[1] Taking time to pause and reflect on our work is critical to learning and improved performance. (Hildren & Tikkamaki, 2013; Andrews, 2012; Di Stefano, 2015; Jakimov, 2008; Raelin, 2001; Kahneman, 2011.) Evidence base for Collaborating, Learning, and Adapting Dashboard.

❑ **Who needs to be in the room to accomplish the articulated objectives?** Think about active participation and what each attendee would bring to the conversation or output. For example, which partners and their internal function (communities of practice, Monitoring, Evaluation, and Learning (MEL) leads, technical teams, etc.) should be represented? Who should attend? See Roles and Responsibilities for more details.

❑ **Choose the format to fit your objective, audience, and time.** There are a variety of meeting formats and facilitation techniques to help engage participants, encourage learning, and increase effective use of time. The table below outlines various techniques that can be used depending on the objective, audience, and the amount of time you have. You can use more than one idea in a session to mix and match based on desired outputs.

❑ **Have a dedicated facilitator to help design and lead the meeting.** A dedicated facilitator should be leading participants to the desired objective of the meeting. They should be impartial (even if they are internal) to the topic of discussion and should not advance personal opinions or agendas. In seeking internal resources, a facilitator can be from any office. The facilitator is responsible for creating the agenda in collaboration with the meeting organizer and the stakeholders, and communicating the agenda ahead of the meeting. Additionally, facilitating can be viewed as a professional development opportunity for those interested in learning and facilitation.

❑ **Take logistical considerations into account early in the process.** This may include venue, travel, food, materials, and approvals. Clarify resource expectations early in the process when communicating with key stakeholders. At a mission this may involve the Executive Office (EXO) or senior leadership. When considering venues, make sure the space is big enough to accommodate participants and chosen format (classroom seating, small groups, breakout rooms, etc.).

❑ **Define clear roles and responsibilities for the meeting.** It is important to define and communicate roles as the planning process unfolds. Roles and definitions will be different depending on the objectives and the meeting format. A [RACI](#) format might help clarify and communicate roles. Some examples may include:

> ❑ Senior leadership - helps set expectations and context of the objectives and use of outcomes;
> ❑ Facilitator - agenda setting, meeting management;
> ❑ Note taker - takes notes and help compile report; and
> ❑ Logistics coordinator - venue, participant communications.

Choosing a facilitation technique

This annotated list of facilitation techniques is meant as a quick reference guide to help you pick and choose potential formats that fit your context (as defined above). It outlines various techniques by meeting objective type, and provides a brief overview of each technique, including timing and other key considerations. You can use just one technique to accomplish a single objective during a shorter meeting or combine and sequence them to create a longer meeting or event. This is not meant to be a complete inventory of facilitation techniques. Links to additional resources are provided for those interested in exploring the vast wealth of existing resources on adult learning facilitation techniques and methodologies.

Objective	Technique	Time	Resources
Information Sharing	**Gallery Walk** is an alternative method to review small group work products in plenary. In a gallery walk, each group has created a poster of their work and displays it on a wall or board in the room. One or two people from the group stay with the poster while the others walk the gallery to view the posters from other groups, allowing for a more intimate conversation, questions for clarification, and feedback that is not as likely to happen in serial plenary presentations. The drawback of the traditional plenary group presentations for reviewing group products is that (a) it can get tedious, especially if there are many groups and (b) groups presenting later in the sequence tend to focus on their own presentation with the risk that they are not paying attention to other groups' presentations. This approach allows for more meaningful conversations among participants about the products of their group work in a shorter amount of time than plenary presentations. It also provides a space for participants to be creative and visual with their ideas and concepts.	30-45 minutes	[Gamestorming - Poster Session](#)
	Shift & Share replaces long large-group presentations with several concise descriptions offered simultaneously to multiple small groups. A few individuals set up "stations" where they share in ten minutes the essence of their approach, innovation, etc. that may be of value to others. As small groups move from one station to another, their size makes it easy for people to connect with the innovator. They can quickly learn where and how new ideas are being used and how they might be adapted to their own situations.	30-60 minutes (depending on the number of sharing stations)	[Liberating Structures](#)
	World Cafe is a whole-group interaction method focused on conversations. A Café conversation is a creative process for leading collaborative dialogue, sharing knowledge, and creating possibilities for action in groups of all sizes. The environment is set up like a café, with paper-covered tables supplied with refreshments. Four to six people sit at a table and hold a series of conversational rounds lasting from 20 to 45 minutes each, related to one or more questions. At the end of each round, one person remains at the table as the host, while the others travel to separate tables.	60-90 minutes	[The World Cafe](#)

	Table hosts welcome newcomers to their tables and share the essence of that table's conversation so far. The newcomers relate any conversational threads they are carrying from other tables - and then the conversation continues, deepening as the rounds progresses. This technique can be used with progressive conversations for up to three to four rounds of conversation. For example, starting with information sharing, groups narrow down to consensus building or prioritizing.		
Problem Solving	**Start, Stop, Continue** is a useful technique to help groups reflect towards problem solving or strategy setting. It can be useful to help groups process monitoring and evaluation, or other types of data towards action. This technique can be used as an opening or closing reflection and is well paired with 1-2-4-All (see below). Ask the group to consider the current situation or goal and individually brainstorm actions in these three categories: • Start: What are things that we need to START doing? • Stop: What are we currently doing that we can or should STOP? • Continue: What are we doing now that works and should CONTINUE?	10 minutes to 1 hour depending on the size of the group	[Gamestorming](#)
	1-2-4-All is a technique that facilitates rich conversation in small groups and then brings the small groups together to integrate their ideas around an important question or issue. • **(1)** Give participants a short amount of time to silently reflect on a question or issue. • **(2)** You can then invite participants to talk to the person next to them to share their idea or, if you'd like participants to move around and mix it up a bit more, ask them to stand up and find a partner. • **(4)** Give the pairs 5-10 minutes to discuss the question. Then ask two pairs to join up. Suggest that they each first share interesting things they heard or said in the previous rounds. Then continue with the conversation as a group. Less time is needed in the pairing of pairs. • **(All)** Finally, invite everyone back to the whole group. Without "calling on" individual small	30-45 minutes	[USAID Assist](#) [Liberating Structures 1-2-4-All](#)

	groups, ask an open question such as "What insights emerged from your conversation?" or "What did you learn that is important for the large group to understand?" This technique can be paired with other techniques to reflect on a shared experience that leads to action. For example, you can use the **What, So What, Now What** conversation in the **1-2-4-All** context to process information and think through its implications in the future.		[Liberating Structures What, So What, Now What?](#)
Collaboration/ co-creation	**Cover story** helps teams with visioning towards a future state, pushing them to "think big," while actually planting the seeds for a future that perhaps wasn't possible before the activity was facilitated. The participants must pretend that this future has already taken place and has been reported by the mainstream media. Break the group into teams of 4-6, each with a template that has the following: "Cover" tells the BIG story of their success. "Headlines" convey the substance of the cover story. "Sidebars" reveal interesting facets of the cover story. "Quotes" can be from anyone as long as they're related to the story. "Brainstorm" is for documenting initial ideas for the cover story. "Images" are for supporting the content with illustrations. Ask the players to imagine the best-case scenario for their activity or project and to take that scenario one step further. Request that they spend five quiet minutes imagining their own stories before they work together to agree on one to develop as a group. Give the groups 30-45 minutes to generate this "story of the year" and represent it on their template. Reconvene the breakout groups and ask for volunteers to present their visions first. Give each group 5–10 minutes to share what they imagined was written in the story and the supporting elements. Note any common vision themes and areas of agreement across groups. Ask for observations, insights,	60 minutes	[Gamestorming](#)

	and concerns about the future state.		
Decision-making/ consensus building	**Dot voting** is one of the simplest ways to prioritize and converge upon an agreed solution with medium to large sized groups. First, the group needs a set of things to vote on. This may be something they have just developed, such as a wall of sticky notes, or it may be a flip-chart list that captures the ideas in one place. Ask the group to cast their votes by placing a dot next to the items they feel the most strongly about. They may use stickers or markers to do this. As a rule of thumb, giving each participant three votes to cast works well. Participants cast their votes all at once and they may vote more than once for a single item if they feel strongly about it. Once all the votes are cast, tally them, and if necessary, make a list of the items by their new rank. This prioritized list becomes the subject of discussion and decision making. In some cases, it may be useful to reflect on ideas that didn't receive votes to verify that they haven't been left behind without cause.	10-15 minutes	[Gamestorming](#)
	25-to-10 Crowdsourcing is a technique for quickly generating and prioritizing ideas with large groups to move to consensus. Distribute one index card to every participant. Pose a question and ask everyone to think about their best response/idea silently, and then write it clearly on the card. When all have completed their card, ask everyone to mill around swapping cards repeatedly until the cards have churned and no one has their own card. At the signal, ask participants to pair off. Each person reads the idea on the card in their hand and tries to sell the idea to the other person. Then trade cards and rate the idea on the card on a scale of 1-5, "5" being fabulous and "1" just OK. At the signal, each person makes a new pair and repeats the procedure. Repeat five times. At round 5, each card should have 5 ratings. Each person adds up the score for the card in their hand. The facilitator asks for any idea with a score of 25…24…23…etc. until the highest scored idea is identified. Ask the person to read the highly rated idea aloud. Continue to identify and read out the top 10 high scores. If the group is small, each card can be used to express more than one idea.	30-45 minutes	[Liberating Structures](#)

	NUF Test participants rate an idea on three criteria: to what degree is it New, Useful, and Feasible? Set up the game by quickly creating a matrix of ideas against the criteria: • **New:** Has the idea been tried before? An idea will score higher here if it is significantly different from approaches that have come before it. A new idea captures attention and possibility. • **Useful:** Does the idea *actually* solve the problem? An idea that solves the problem completely, without creating any new problems, will score better here. • **Feasible:** Can it be done? A new and useful idea still must be weighed against its cost to implement. Ideas that require fewer resources and effort to be realized will score better here. To play, the group rates each idea from 1 to 10 for each criterion and tallies the results. A group may choose to write down scores individually at first and then call out their results on each item and criterion to create the tally. Scoring should be done quickly, as in a "gut" check.	15-30 minutes	Gamestorming

SAMPLE MEETING AGENDAS

- CLA Initiative for Measurement Learning Network Synthesis Meeting
- Enhancing Private Sector Engagement Collaboration Workshop
- MERLIN Partners Meeting
- Ebola Response Big Picture Reflection Meeting

ADDITIONAL RESOURCES

› Facilitating Pause and Reflect

› USAID Strategy Mid-Course Stocktaking

› Designing Participatory Meetings and Brownbags

› Participatory Facilitation Techniques

› Community Tool Box: Conducting Effective Meetings

› Team Decision Making: The Gradients of Agreement

› A Guide to Co-training in Face-to-Face Programs

› Planning and Implementing Retreats: A Leader's Guide

› For more information, please email us at learning@usaid.gov