DRAFT Mission-Internal Adaptation/Decisional Portfolio Review Workshop

Session Facilitators’ Guide

* Estimated # of attendees
* Venue

# Purpose of the Workshop

1. Reflect as a Mission on what we’ve learned from:
	1. Field-based Learning Reviews - observations from site visits and talking to beneficiaries/implementers
	2. Activity Quarterly Reports
	3. Any completed Assessments, Research, Evaluation, Monitoring Data on our programming
	4. All-IP meeting
2. Surface possible adaptations that respond to gaps, needs, or changes in context that we’ve identified or anticipate in the near future
3. Prioritize those adaptations so we can focus on those that give us the most “juice for the squeeze”
4. Action Plan how to implement priority adaptations so that we can put our learning into action

# Guiding Principles for the Decisional Workshop

* **Learning oriented**
	+ We will use observations from our Field-Based Learning Reviews, complemented with good quantitative and/or qualitative data where we have it, as well past experience, inputs from partners and other stakeholders, and what we know about relationships and social/political capital as well.
* **Action/Solutions-oriented**
	+ Stay focused on the “so what?” questions - how will this line of inquiry get us to an action plan?
* **Participatory**
	+ Should engage staff from all levels, offices, and support units, particularly FSNs who have uniquely valuable contextual experience
* **Good enough / “roughly right”**
	+ No plan survives first contact with reality - we will strive to make plans to adapt without getting overly invested in getting every detail of that plan perfect

#

| Time | Session | Session Objectives | Activity | Materials | Facilitator(s)/Speakers |
| --- | --- | --- | --- | --- | --- |
| (20m) | Intro & Welcome | Participants understand the objectives, agenda, and expectations for their contributions | * Welcome remarks from FO
* Objectives for this event (and specifically, for today)
	+ What does success look like?
	+ What do we need to achieve in order for people from across the Mission to feel like participating in the stocktaking was time well spent?
* Ground Rules
* How we got to today
* What we hope participants will contribute/ take away
 | [Slide deck](https://docs.google.com/presentation/d/1fJbSpinIuAmLd79Ssnysm5OlPG9ZllkXKl9e5iNxEVQ/edit#slide=id.p1) | -John Allelo (Welcome)-Rebecca White (Objectives)-Shannon (Ground Rules)-Arpi (what the Mission has done so far) |
| (30m) | Overview of learning per Technical Teams | Participants are reminded of (or hear for the first time) what we’ve learned so far from FBLRs, MEL, All-IP Meeting | Each DO team will have no more than 15m to present no more than 10 slides, including DO-level summary of RF | [Slide deck](https://docs.google.com/presentation/d/1fJbSpinIuAmLd79Ssnysm5OlPG9ZllkXKl9e5iNxEVQ/edit#slide=id.p1) | Technical Team Leads |
| (45m) | What can we do about what we’ve learned | Together, Look Back on Progress to Date and Decide What Adjustments Are Needed | [What, So What, Now What?](https://www.liberatingstructures.com/9-what-so-what-now-what-w/)* First stage: WHAT? Individuals work 1 min. alone on “What happened? What did you notice, what facts or observations stood out?” then 2–7 min. in small group. 3–8 min. total.
* Salient facts from small groups are shared with the whole group and collected. 2–3 min.
* If needed, remind participants about what is included in the SO WHAT? question.
* Second stage: SO WHAT? People work 1 min alone on “Why is that important? What patterns or conclusions are emerging? What hypotheses can I/we make?” then 2–7 min. in small group. 3–8 min. total.
* Salient patterns, hypotheses, and conclusions from small groups are shared with the whole group and collected. 2–5 min.
* Third stage: NOW WHAT? Participants work 1 min. alone on “Now what? What actions make sense?” then 2–7 min. in small group. 3–8 min. total.
* Actions are shared with the whole group, discussed, and collected. Additional insights are invited. 2–10 min.
 | * Chairs for people to sit in small groups of 5-7; small tables are optional
* Paper to make lists
* Flip chart may be needed with a large group to collect answers
 | SHANNON |
| (20m) | Narrowing our focus to what’s possible | Prioritize proposed adaptations | *(If there are more than 5 proposed adaptations that need discussion by the whole Mission we can do a quick dot voting exercise to narrow them down first.)*Facilitator pulls large post-it notes containing a proposed adaptation from the wall, one at a time and asks participants to guide where it is placed on the 2x2 matrix:* First: L to R for small impact to large impact
* Second: once all the post-its are arrayed L to R, then each individually is moved top to bottom for difficult to easy to implement

Facilitator highlights those that end up in the lower right quadrant as “low hanging fruit” - i.e., big impact for low effort.*(Alternatively, if there are popular “issues” that everyone feels we need to fix, but not a clear proposal for the way forward, we could replace this exercise with* [*25/10 Solutions*](https://www.liberatingstructures.com/12-2510-crowd-sourcing/) *to help generate and prioritize ideas for what to do about it.)*Facilitator asks for volunteers who will work together to create [Action Plans](https://docs.google.com/document/d/1S3Gx0jGIyLYiF_yf50utmgQ_x7v5f-Ktq5b1JetH-BU/edit) for each low-hanging fruit solution. | 2x2 Impact v. Feasibility Matrix on BIG Flip ChartLarge post-it notes with each propose adaptation written in bold marker so it’s easy to read(stickers for dot voting) | SHANNON |
| (5m) | Wrap Up/ Next Steps |  | As they are leaving the room/virtual session, participants add post-it notes to 3 flip charts/ slides:* I liked…
* I learned…
* I wish…
 | Flip charts and slides to collect feedback on the workshop. | **SHANNON** summarizes what we covered today |

#