

# LEARNING REVIEW

## Facilitation Guide

### Why Do this?

The Learning Review process is an opportunity for people to make sense of the information or data that has been collected to date about a program, initiative or movement. The goal is to bring together different perspectives to make sense of the information collected, to reflect, to learn and to generate new knowledge that will ultimately be used to inform decision-making and ongoing planning. The aim is to have, by the end of the meeting, a better understand of how to address critical issues in your community.

This guide is intended to provide ideas and suggestion for how to structure and facilitate a learning review meeting.

### Who Should Participate?

In order to gather a variety of perspectives and insights, a diverse group of stakeholders should participate:

1. *Organization staff*
2. *Program/Initiative coordinators, field agents*
3. *Program/initiative participants*
4. *Community leaders, opinion leaders (informal and formal)*

➔ Be mindful of power dynamics, and do what is necessary to minimize them. While we encourage a range of stakeholders to participate, in order for knowledge to be exchange across diverse perspective, the exact make-up of the learning review meeting will dependent on the nature of the work and the population primarily engage through the program/initiative.

### Considerations

1. The learning review meeting will take approximately 2-3 hours to complete.
2. **The learning review needs to be structures around some critical learning questions or lines of inquiry<sup>1</sup>** based on your work and the implementation of tools (participatory tools). Think of questions that seem most interesting, provocative or relevant to the stakeholders participating as well as to the work.
3. **Choose no more than 3 to 4 questions to focus on.** Consider prioritizing questions around who will be participating and what you have learned from the Action Learning process to date. The goal is for people to explore in greater depth a few questions rather than skimming through many questions.

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<sup>1</sup> For example, refer to your evaluation questions or the areas of inquiry that are driving your Action Learning process or evaluation/research.

<sup>2</sup> For more information on this approach, take a look at <http://www.theworldcafe.com/key-concepts-resources/world-cafe-method/> and

4. A few days before the meeting, share the selected questions with the meeting's participants. This will allow people who played a key role in the implementation of the participatory tools to review their notes and any documentation forms. (Note, this is not obligatory and you decide if this will be helpful.)
5. **You will need some materials to help facilitate the meeting.** This could include tables and chairs or wall space and chairs. Also, gather some large pieces of paper, cards or sticky notes, markers, tape or string, sticky dots or stickers, and construction paper.
6. **Read through the facilitation guide before implementing.** In fact, you may want to try it out with staff before working with stakeholders. Implementing this tool will require small group facilitation by staff or participants who have strong leadership skills. Make sure you understand the purpose of the meeting, have a sense for how to implement the activities, and considered space, materials, and information that might be needed. Make it your own!
  - *You are facilitating a conversation amongst experts – you are not the expert in this scenario. You are there to support a conversation by working through an activity.*

## Set-Up

1. **SETTING UP THE SPACE:** For one of the activities in the learning review meeting, each participant will be asked to share his or her insights about each of the identified questions. To do this, you will need to create “stations” - *one for each of the questions you selected.* These stations could be a small table and some chairs or chairs organized around a large wall. For another activity, you will need tables or a wall to work with along with construction paper cut-outs, tape and a large drawing of a tree. (See below – Knowledge Tree)
  - **Each group should have no more than 6 people.** If you have a large number of participants, than you can do TWO stations per question. Large groups make it difficult for quiet people to share and for facilitators to support the conversation.
  - **Each station should have a facilitator (see below).** For Activity #1, this person should write down the question that will be the focus of that station's conversation.
  - **Materials** for each station:
    - **ACTIVITY #1** – large sheets of paper, large cards or sticky-back paper (at least 4”x 6”) and markers. We recommend that you color code the use of cards, if possible; a different color assigned to each question, which will help with the Knowledge tree activity.
    - **ACTIVITY #2** - dots or stickers. These can be any color, but you may want to consider different colors for different types of stakeholders (gender, role in the organization or community, etc.)
    - **ACTIVITY #3** – construction paper cut-outs, markers, pen, tape, and a tree drawn on large sheets of paper. **Refer to the section below – the Knowledge Tree.** It is best to have drawn the tree and cut-out the “fruits” (or shapes cut out of construction paper) prior to the start of the activity to help save on time.
  - **Time-Keeping.** Make sure that someone (maybe the note taker) is keeping track of time and alerts facilitators when they have 2 to 3 minutes remaining for an activity. Use bells or clap your hands to signal to participants that it is time to move to another station or shift to another task.

## 2. ROLES:

### Facilitators:

- **You will need one main facilitator (or two) who will “set the stage”** for the process and give clear directions. The main facilitator(s) is not the person who will be supporting the conversations at the station.
- **You will need strong facilitators, for each station.** Their job is to make sure that people can participate, to listen deeply, and to ask questions such as “**Why did this happen?**” and “**What does this matter to you?**” We cannot understate the importance of asking these probing questions during the activities. *For example, if in response to one of the station's main question, someone says, “Girls don't like school”, you must ask, “Why? Why don't they*

like school? What makes them dislike school specifically?” By asking these questions, you are getting closer to the root of the issue and are facilitating a deeper conversation and greater critical thinking. Facilitators should help document their table’s discussion (the major points or take-aways).

#### Note takers:

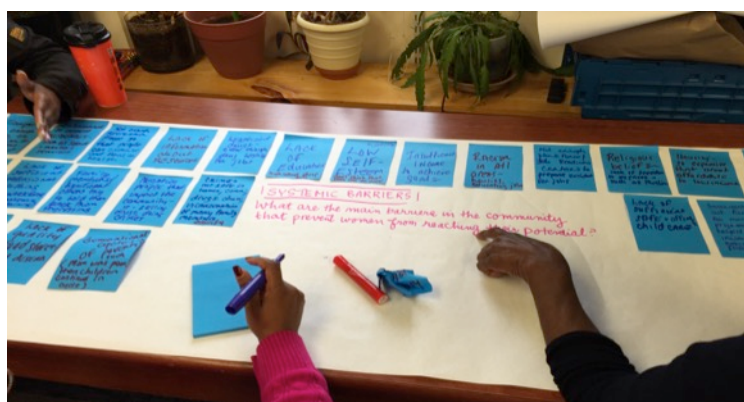
- You will need one person to be taking notes carefully about what comes out of the big group discussions; these are the discussions that will take place *after* the questions have been processed (please see below large group reflection Knowledge Tree). They need to write down important quotes, and identify who said what. Note that this person will not be able to participate in the large group discussion.
- The note taker also needs to be sure to **take pictures** of everything that is drawn and put on the Knowledge Tree (see below).

## Setting the Stage

The day of the meeting, before dividing participants into groups for the first activity, provide a very brief and general overview of why people were brought together, the goals for the meeting, the process that brought them to this meeting and how the meeting has been structured (generally). It is important to reinforce that participants are the experts and that the focus is to make sense of what has been learned to date in order to inform ongoing decision-making and planning. Divide participants into equal groups (about).

## How to do this?

1. **ACTIVITY #1 - WORLD CAFÉ (45 mins to 1.5 hrs):** For this first activity, you will be using the “**World Café**” method, which is a simple, flexible format to help structure conversations, in this case, around the 3 to 4 questions you have identified for the purposes of sensemaking and learning.<sup>2</sup> To goal is to capture diverse insights and perspectives about the questions in order to identify new knowledge (i.e. what we know, what we have learned) and support ongoing planning and decision. World Café takes place in “rounds of conversations”; each question represents a round, so if you have 3 questions, you will have 3 rounds of conversations. *Please take this into consideration when planning the activity and overall meeting to ensure there is sufficient time for people to have meaningful conversations.* Participants will spend a set amount of time at one station to share and contribute to one question, before moving to another station and so forth. At the end of the activity, each participant will have contributed his or her perspective and wisdom to each question/station. See above for what materials you will need for this activity.



<sup>2</sup> For more information on this approach, take a look at <http://www.theworldcafe.com/key-concepts-resources/world-cafe-method/> and [http://www.barefootguide.org/uploads/1/1/1/6/111664/barefoot\\_guide\\_2\\_learning\\_companion\\_booklet.pdf](http://www.barefootguide.org/uploads/1/1/1/6/111664/barefoot_guide_2_learning_companion_booklet.pdf)

### To facilitate this activity:

- **Divide participants** into small groups (e.g. you can number them off) and invite them to participate at a station.
- **Have participants think about the question quietly**, alone for a few minutes. (Remember that each station will be tackling a different question, so as the facilitator, work with your assigned questions only.)
- Then, ask participants to contribute insights, perspectives, knowledge in relation to the question. This might **start as a conversation**, before you begin to write down what is being said (i.e. themes, statements). Write down the themes or statements on the small pieces of paper or sticky-back paper; **only 1 idea per piece of paper**.
- **Ask “WHY?” often. Make sure to ask clarifying questions to get at the heart of the issue, statement or insight.** Don’t rush this. **This is critical, as statements will be rated (Activity #2) and people need to understand the point.**

*For example, if one of the questions explores why changes in the community do not happen and a participant contributes that it is because of community leadership or government, ask “WHY IS THAT? Can you explain?” Writing down “community leadership or government” will not be helpful to support ongoing reflection or learning; instead, the statement should be clear and comprehensive – such as “community leadership or government is not held accountable by community members because of fear of reprisal.”*

- Depending on time, spend about 15 to 30 mins on this first round of world café. **You will likely need to spend more time on the first and second rounds of conversations**, compared to the subsequent rounds, as people become familiar with the activity and feel comfortable sharing. Someone should alert you when you have 2 to 3 minutes remaining in the round.
- **When this first round of discussion is over, have participants go to another station.** Ideally, people should not stay in the same group each time, so please try to break-up groups. To do this, you can number of people or use colored tags, or the facilitator can send people to different groups. This will give people an opportunity to engage with other participants.
- **When your new group of participants arrives, introduce them to the question and share with them the major themes identified by the previous group(s).**
- Begin the process again, as laid out above, adding new insights, perspectives and building on the knowledge shared by the previous group(2).
- **The activity ends when each participant has visited each station and contributed to each question.** This activity will likely take at minimum 45 minutes to complete. **WE RECOMMEND YOU BEGIN ACTIVITY #2, RANKING, DURING THE LAST ROUND OF DISCUSSION. SEE BELOW.**

- ☞ **CONSIDER THIS.** If you prefer to use visuals instead of words, you can have participants draw on a large post-it or piece of colored paper symbols that represent what they want to share relative to the question. The symbols can be simple – this is just to represent the story or example that will be shared in the group. Each person then shares his/her story or example. (If people seem very shy, they can work in pairs or groups of three.)





**2. ACTIVITY #2 – RATING (20 – 30 mins).** Following the rich conversation around key areas of inquiry using World Café, it is important to identify which themes or statements are most critical or important. The goal of the rating activity is for stakeholders to identify what they believe to be most relevant, significant or contributory relative to the questions that frame sensemaking and learning. See above what materials you will need for this activity.<sup>3</sup>



**To facilitate this activity:**

- \* It is best to initiate this activity at the end of the final round of conversation in world café.\*

<sup>3</sup> For more information on group rating, ranking and other group generated statistics, please refer to, "Who Counts? The power of participatory statistics" edited by Jeremy Holland.

- **Number of Dots?** For each question, give each participant 3 to 5 sticky dots or stickers; the number of dots or stickers per question will depend on the number of themes generated for each question. If a small number of items were generated (e.g. under 10), give fewer dots as the purpose is to identify *themes that are most important*. For example, if World Café included the use of 3 questions, and more than 10 items were generated for each question, then each participant would receive 15 sticky dot or sticker.
- At the end of the last round of the World Café conversations, you can jump directly into this activity by having participants review the themes that were generated and identify individually which of the themes or statements are most important; they will rate by placing on dot on the card. **This is also why it is imperative that only 1 idea/theme/statement is written per card and that the statements are clear and comprehensive.**
- Give participants about 5 mins per station, although some may need more or less time. It is ideal to have a break after this activity.
- **Once all participants have rated the themes for each question, the facilitators will pull the cards with the most dots and place them at the root of the Knowledge Tree; See activity #3.**

**DON'T FORGET TO DOCUMENT!** Remember to take pictures of participants working in the groups (if you have consent) and to take pictures (overall and close-ups) of the information that was generated for each question.

**3. BREAK TIME!** – Make sure to give participants a break before heading into the next activity.

**4. ACTIVITY #3 – KNOWLEDGE TREE! (20-30 mins to generate ideas, and the report backs)** The goal for this activity is to begin putting into action the new knowledge generated from the World Café. This activity taps the collective creativity and talents of stakeholders by engaging them in conversations about what this knowledge means and how it can best inform decision-making and ongoing planning. See above what materials you will need for this activity.

*\* For the next activity, have ready your large tree drawn with big roots and lots of branches (see picture below) and the cut out shapes, like fruits on a tree (you will need about 30 or so). This is best prepared before the activities begin. Make sure to place the themes most rated from the World Café along the roots of the tree, organized according to question.*



### To facilitate this activity:

- There are number of ways to kick-off this activity and its best to ensure that everyone in the room (or small groups) knows which of the statements or themes (from World café) were identified as being most critical; this can be done through a quick review by the facilitators (e.g. reading off the cards posted along the rooms) or having participants go up to the tree and review on their own. (Consider the size of the group, space and time.)
- **Divide participants into small groups**, with no more than 6 people per table or working area.
- Provide each small group with a small pile of paper fruit/cut-outs and some markers. Ask participants: **Reflecting on was discussed and learned today that was most critical (i.e. the cards along the roots of the tree), what are some opportunities or BIG IDEAS for the program/initiative to consider in order to make progress on these issues? What could it do more of, or differently?**
- The group discusses, and writes down the most important ideas on the fruit/cut-outs and **only one important idea per fruit!**
- **Time to share out the ideas!** Have one group at a time (or one person per group) share the ideas written on the fruit, providing any additional clarifying information. Have one facilitator take the fruits and place them on the tree, clustering similar ideas together.
- **Group discussion.** Once all the groups have presented their ideas, engage the larger group in discussion around how the process felt for them? What was most surprising, interesting or difficult about the process and/or the information that was generated? What can each person commit to personally to put this knowledge into action in his or her work or community?
- **Rating?** If there is time and if identifying the top BIG IDEAS will bring value, you could have each participant identify what they believe is the top ideas. Use dots, only 1 or 2 per participants, as described above.

**DON'T FORGET TO DOCUMENT!** Remember to record the important takeaways from this conversation on large pieces of paper affixed to the wall or on a notepad (which, while practical, may not be transparent in the context of participatory tools implemented in group settings). Remember to take pictures of participants working (if you have consent) and of the knowledge tree.



**POST ACTIVITY DISCUSSION:** At the end of the meeting, the facilitators should review what they heard and learned from the participants, review the notes that were taken, the drawings that were created. **The conversation should focus on what was learned, especially new information or insights and what this means for the work or program? What shifts might need to be made, what else what need to be considered. DON'T SKIP THIS STEP!**