

**CBSL 2020–2021**

Toolkit for Building a   
Virtual Learning Cohort

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Capacity Building for Strategic Learning Initiative: Toolkit for Building a Virtual Learning Cohort

A toolkit of tips, tools, and considerations for building and facilitating a virtual learning cohort

Context

From May 2020 to September 2021, Mathematica and Catalyst:Ed partnered with the Bill & Melinda Gates Foundation and a set of nine K–12 education grantees for the [Capacity Building for Strategic Learning (CBSL) pilot initiative.](https://www.mathematica.org/projects/gates-capacity-building-for-strategic-learning-initiative) The partnership defined equity-centered strategic learning as the set of efforts that enables organizations to set goals that contribute to increased educational equity for Black and Latino students and students experiencing poverty; establish hypotheses on how to reach their goals; build strong organizational culture, practices and systems that support implementing and testing those hypotheses; and use information to improve their model on an ongoing basis. Critically, the partnership believes that strong equity-centered strategic learning is demonstrated when equity is considered in not only the organization’s goal but also in its learning and decision-making approach. The initiative’s goal was to strengthen grantee capacity for equity-centered strategic learning by helping grantees scope projects in their area of need, matching grantees with providers that could help build organizational capacity, delivering cohort learning activities, and offering thought partnership.

In its role as an intermediary, Mathematica facilitated activities on behalf of the foundation. These included helping grantees identify and address their organizational needs, as well as supporting grantee-to-grantee relationships by fostering a peer learning community that offered webinars, interactive discussions, and social events—referred to as “learning activities.” This toolkit can serve as a useful starting point for facilitators for similar peer-learning cohorts, and the materials are adaptable to meet the differing needs and goals of facilitators. A second toolkit from the initiative containing resources to launch a strategic learning initiative can be found [here](•%09https:/mathematica.org/publications/toolkit-to-support-capacity-building-for-strategic-learning-initiatives).

How do I use this document?

As a learning cohort facilitator, you can use this document when planning a variety of learning activities for a learning cohort. This toolkit offers guiding **values** to consider when planning activities for a cohort of participants organized around a common theme, such as **equity.** It provides **10 transferable tools** to help you get started in your activity-planning process, including a scheduling survey, activity-planning template, activity flyer template, meeting design template, tools for planning a virtual retreat, and an evaluation form.

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| --- |
| Throughout the tools and templates, brackets [ ] will be used to indicate where facilitators should fill in their own information. |

Before You Begin: Guiding Values

From the start, it may be useful to establish shared values among facilitators, funders, and participants. Doing so helps ensure the learning cohort experience is satisfactory and the needs and goals of all the stakeholders are met. These were values we held while developing the following tools, and they can be adapted as necessary.

|  |  |
| --- | --- |
| Person with idea | Choice: Participants should be able to choose how, when, and to what extent they engage in the activities. |
| Repeat | Consistency: Activities and communications should be predictable and clear. |
| Scales of justice | Equity: Seek to promote the voices of historically marginalized participants, speakers, and stakeholders. |
| Paint | Creativity: Think outside of the box to meet diverse learning needs. |
| Line arrow Horizontal U turn | Flexibility: Assume things will change, and be responsive to evolving participant needs and external factors. |
| Upward trend | Value: Lead with a determination to create a worthwhile experience for participants by adding value through collaborative learning activities. |

Before You Begin: Prioritizing Participant Feedback

Be sure to incorporate the voices of cohort activity participants into all stages of planning and facilitation.

| Engagement strategy | Description | Level of effort | Stage | Steps to implement engagement strategy |
| --- | --- | --- | --- | --- |
| [Scheduling survey (Appendix A)](#app_A) | Template for requesting feedback on the best days and times to hold learning activities | Medium | Planning | * Identify times when the key facilitator is available. * Identify topics that are relevant to the participants. * Use scheduling system or form to create a survey for participants to indicate their availability and interests. * Choose a date, time, and topic that work best for most participants (consider varying the timing of sessions if you are scheduling multiple learning activities to ensure everyone gets exposure to the cohort). |
| [Periodic Check-In Template (Appendix B)](#app_B) | Template for capturing notes on grantee experience with the initiative and cohort monthly | High | Ongoing | * Create template that aligns with the cohort/project’s goals. * Ensure the template has core questions that you can repeat each meeting and rotating questions that you can ask as needs change. Having core questions can be a helpful way to evaluate the progress of grantees’ strategic learning efforts. * Use the same template with all participating organizations to ensure you get all organizations’ perspectives on each topic. |
| [Post-Activity Evaluation Forms (Appendix C)](#app_C) | Template for gaining participant feedback on learning activities | Low | After | * Identify a set of questions (we identified 5–7 for our forms) related to the initiative’s or activity’s goals—aim to ask how well the activity contributed to those goals. These questions can be geared toward the initiative overall or for specific learning activities. * Present questions using different scaling options. * Include at least one extended response question so participants can share qualitative feedback anonymously.   AND/OR   * Identify three multiple choice questions that participants can quickly answer at the end of a learning activity to share their experience. |

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| Additional considerations  Participants will engage in each of these engagement strategies differently depending on their relationship with the facilitators. Participants may become more vulnerable or honest as trust is built.  Ensure the data you collect will be used: Create a plan before engagement on how you will use data.  Prioritize transparency with participants. Keep them informed as to why you are collecting data. |

Getting started: Communicating with Participants

Tips for outreach to cohort participants about learning activities

|  |  |
| --- | --- |
| Watch | Thank participants for their efforts. Regardless of the context, thanking or acknowledging participants’ efforts in activities that are not part of their day-to-day business is crucial for relationship building. |
| City | Acknowledge context – pandemic, racial unrest, busy seasons, etc. Acknowledge any contextual factors affecting the participants’ work or lives, because these may affect participants’ ability to engage in any given activity. Participants’ safety (psychological, physical, or emotional) must be addressed before work can begin on an ongoing basis. |
| Single gear | Specify the topic and structure of activity. Early in communication with participants, provide information on what the learning activity will cover and how the time will be used. Doing this helps participants judge whether an activity is a good use of their time and aligned with their learning style. |
| Daily calendar | Provide concrete details – date, time, deadlines for sign-up, etc. Bolding, italicizing, or highlighting the key information helps participants focus on the most critical pieces and helps ensure they complete next steps. If this key information is not easy to find, participants may not see it as they quickly read through materials. |
| Boardroom | Describe what participant engagement should look like – discussion, questions in chat, listening and learning. Participants need to know how to show up. Being concrete about what level of participation will be required is not only helpful to you as the facilitator but also to participants. For example, if a participant expects to attend and listen, they would be surprised if they are asked to speak multiple times. Sharing this information early helps people build trust by minimizing surprises and helps participants prepare appropriately. |
| List | Send agendas and pre-reads ahead of time. Agendas will help participants feel comfortable attending because they will know what to expect. Pre-reads are a way to share information that might not have space in the agenda or that will provide helpful context on the learning activity’s topic. Sharing both with participants a few days in advance can help participants feel prepared and ready to jump in once the activity begins. |
| Email | Be mindful about communication frequency. Aim to send as few emails as possible in a week (no more than one or two) because participants can become fatigued if they receive multiple emails and might not respond to or read them. |

Getting Started: Considerations for Planning Learning Activities

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| Bullseye | Align learning activities with the cohort or initiative’s purpose and goals. Clarify from any relevant stakeholders the purpose of the cohort and align activities closely with its purpose and the goals. Without clear connections to goals, participants may feel that activities are not a good use of their time |
| Wi Fi | Assess participants’ bandwidth. To determine the frequency of learning activities, consider participants’ bandwidth— their ability to make time and pay attention. See the Communicating with Participants page above for specific engagement strategies to monitor participants’ bandwidth. Avoid creating too many learning activities when participants have low bandwidth, which will cause them to disengage, or creating too few learning activities when participants have high bandwidth, which can leave them feeling unsatisfied. Here are some examples:  Example 1: Participants may have a high bandwidth for learning activities due to their excitement, balanced workloads, and additional funding. In this case, participants may have space for intimate learning pods or frequent cohort meetings.  Example 2: Participants have low bandwidth due to a busy season, low staff capacity, or stressors from current events. In this case, participants may seek structured activities that occur less frequently (for example, once a month for no more than 60 minutes). |
| House | Consider content and structure. While planning an activity schedule, it is tempting to think about what content the activities will cover first. However, it is also important to figure out how (or the structures through which) information will be delivered. For example, facilitators and participants should consider the structure of the learning activities, including whether they will be in person or virtual, who will be speaking and for how long, and what the participation expectations are for participants. Early on, you may not know what topics to cover, and the participants’ interests may change over time. Therefore, topics can remain flexible and develop over time to fit the structure. Choose varying structures to account for diverse learning needs and ensure the structure and format of activities are informed by participant preferences (e.g., discussion over lecture). Finally, try to incorporate learning activities that accommodate variations in bandwidth.  Planning template: Map logistics of all planned activities along a project calendar to align with the guiding values and goals of the initiative and determine frequency and roles.  Diverse activities: Use multiple types of learning activities to keep participants engaged and be responsive to diverse learning needs.  Flyer: Translate relevant details to a digestible and visually pleasing flyer to distribute to participants. |
| Questions | Clarify optional vs. required activities. Clarify early on whether learning activities are optional or required, and communicate this to participants. When designing each activity, consider how participants will engage in each scenario. For example, when activities are optional, there may be low attendance at times, and when they are required, participants might be in attendance but might not be engaged. |

Promising Practices for Conducting Virtual Webinars and Meetings

We recommend incorporating and being attentive to your guiding values before, during, and after learning activities. We developed these promising practices based on the guiding values for our initiative, including choice, consistency, and flexibility. These promising practices can help you stay mindful of participants’ bandwidths and accommodate them accordingly.

|  |  |
| --- | --- |
| List RTL | **Preparation:**   * Send calendar invite at least one month in advance. * Attach pre-reads, speaker bios, and slides to the calendar invite. * [Create meeting design](#_Appendix_G:_Meeting). * Conduct a dry run with all relevant speakers and facilitators. |
| Call center | **During the meeting:**   * Start and end on time. * Share meeting norms. * Be responsive to questions in the chat. * Be responsive to participant energy levels. |
| Envelope | **After the meeting:**   * Send an email with any relevant materials to all participants, including those who were not able to attend. * Debrief: what went well, what did not work, and what should be changed for the next learning activity? |

Planning a Virtual Retreat

|  |
| --- |
| Sample retreat goals   * Provide an opportunity for all initiative participants to step back and reflect on project/initiative. * Reflect on and build participant capacities. * Provide space for collaborative engagement and relationship building. * Celebrate progress and look toward the future of this initiative and beyond. |

|  |  |
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| Clipboard | Keep track of ideas: The time leading up to a virtual retreat will be filled with ideas for how to spend the retreat time. Use a [“parking lot” document](#_appendix_H:_Parking) where facilitators and initiative participants can record ideas for the retreat’s topics and structure. Having a home base for ideas promotes equity in decision making by giving space for participants who may not feel comfortable verbally sharing their ideas. |
| Filter | Prioritize activities: Begin to prioritize ideas two or three months before the retreat. Prioritize by identifying ideas that meet the learning needs of the participants, which you can collect using a [check-in template](#_appendix_b:_MONTHLY). If there are still an overwhelming number of ideas that align with participant needs, combine ideas that are similar or complementary, and ask participants to anonymously vote on their favorites. |
| Scales of justice | Strike a balance: Virtual retreats can create technology burnout. To keep participants engaged, vary the structure of each retreat learning activity. Hold time for listening, conversations via breakout rooms, networking, and virtual collaboration. Try different platforms and offer a lot of breaks! |
| Social network | Feature participants: Building community in a virtual setting is hard, so it is important to formally feature and honor the work of the participating organizations. [Create posters](#_APPENDIX_I:_POSTER) for each participating organization and disseminate them in advance to help participants get to know one another’s organizations and work. Time permitting, offer opportunities for participants to lead sessions or present their work. |

Planning Time for Virtual Connection: Ideas for Structuring Connection Time

|  |  |
| --- | --- |
| Group brainstorm | Learning pods: Great for participants with high bandwidth  The goal of [learning pods](#_appendix_J:_learning) is to help build lasting, working relationships among participants in the cohort. Learning pods help align the guiding values with the learning activities, such as choice, equity, creativity, and value. Because learning pods are more structured and require focused participation, they work well with participants who have higher bandwidth. More information on learning pods is in [Appendix J](#_ap_pendix_J:).   * Assign participants to groups based on organizational similarities or learning needs. * Identify how often the pods should meet. * Align the pod topics to other cohort activities. * Identify facilitators for pod sessions. |
| Radio microphone | **Unfacilitated conversations: Great for participants with low bandwidth**  The goal of unfacilitated conversations is to make space for peer-to-peer learning, brainstorming, and problem solving around specific topics related to the initiative. These sessions are great for participants with low bandwidth because they don’t require every participant in the cohort to attend. Participants can choose whether they are interested in attending the sessions.   * Identify learning topics participants have raised as important during learning activities or check-in calls. * Identify three or four days and times that participants can sign up for. * When two or more participants sign up for a topic/date, send calendar invite. * Provide topic-relevant discussion questions. |

Offering Cohort Closure

|  |  |
| --- | --- |
| Thought bubble | Reflect on the wins, losses, and everything in between. Spend time remembering the beginning stages of the cohort. Talk about how things changed. |
| Ear | Honor the mixed feelings associated with closing. Excitement, sadness, frustration, and contentment are all feelings participants might feel as the cohort ends. |
| Handshake | Celebrate the hard work and dedication of all involved by sharing highlights and disseminating findings or successes from the participants’ work. |

Appendix A: Scheduling Survey

Below are sample questions that you can choose from as you design scheduling surveys. We recommend using an electronic form, such as Google Forms or Doodle Poll, to make it easier to gather and compile the information.

|  |
| --- |
| [Name of facilitator] is scheduling a [learning activity type] for the [project name]. Participants will come together to [insert objective of meeting(s)].  Our hope is for the [learning activity name] to take place over [frequency]. We are looking to hold a [length of time] [activity] from [time] to [time, time zone].  Please respond, either as an individual or an organization, by [deadline]. A reminder will be sent on [date].  \*Required |

Question 1

|  |
| --- |
| Will you be completing this form for your individual availability, or will you be answering as an organization? \*   * Individual response * Answering as an organization |

Question 2

|  |
| --- |
| Organization\*  [Insert organization name] |

Question 3

|  |
| --- |
| Name (if answering as an individual)  [insert individual name] |

Question 4

|  |
| --- |
| Which day and time work for you or your organization? Please select all that apply. \*   * Monday, January 1 from 1 p.m. to 2 p.m. ET * [day, month, date] from [time] to [time, time zone] * [day, month, date] from [time] to [time, time zone] |

Question 5

|  |
| --- |
| Of the options above that work for you, do you have a preferred day?  [insert preferred day] |

Question 6

|  |
| --- |
| Do you have any scheduling limitations that we should be aware of? For example, dates that you are mostly available but may have some short interruptions.  [describe any scheduling limitations] |

Appendix B: Periodic Check-In Template

[Participant name] Check-in Notes

This template outlines the information that we will collect at each [insert time interval – monthly, weekly, etc.] check-in call with participants. The goal is to track on an ongoing basis information that is helpful for (1) addressing your immediate needs and concerns related to your projects, (2) gathering information on your needs for designing future learning activities, and (3) capturing successes and challenges that can help understand the experiences of [participant name].

Reference links and notes

* Points of contact:
* Best days to meet:
* Goal: Use [insert time interval] check-in calls as a reflective exercise for all.

Because one of our goals is collaboration and transparency with participants, we are sharing this template with you in our first meetingto invite your feedback and ideas for running these check-ins.

| Topic | Notes |
| --- | --- |
| Date | [Day, month, year of call] |
| General updates | [Add notes from call] |
| Project updates   * What has been going well? Are you seeing any meaningful changes to your organization from the project? * What challenges have you faced, and how are you addressing them? * What do you feel your organization needs for your successes to be sustainable? * How do you see this work connecting to other work, projects, initiatives, or funders? |  |
| Equity   * How are you applying an equity lens in this work? * Are there concrete steps you apply to keep equity central? * What has gone well in centering equity in this work? * What barriers have you encountered? How are you working to overcome them? * What do you think is important for sustaining equity in [insert project]? |  |
| Feedback on the process   * What feedback would you offer to us to make this process better? * What has worked well? What has been the most helpful support the project has offered? * Is there anything else you needed or would have liked to see done differently? |  |
| Learning needs and activities   * Do you have any reactions or reflections on the most recent learning activity? * How do you feel about the structure? What's working well? What would you like to see improved? * What learning topics would be most valuable to your organization at this moment? |  |
| Questions for the organization   * Is there anything you would like us to convey to [insert partner/funder/organization]? |  |
| Action items   * Include future meeting topics. |  |

Appendix C: Post-Activity Evaluation Form

Below are sample questions you can choose from as you design evaluation forms. We recommend using an electronic form, such as Google Forms or Doodle Poll, to make it easier to gather and compile the information.

|  |
| --- |
| [insert statement thanking participants and giving instructions, such as “Thanks for attending our [name of learning activity] on [insert topic]! Let us know what you thought of the learning activity through this quick, anonymous form.] |

Question 1

|  |
| --- |
| How engaging was this learning activity?   * Not engaging * Somewhat engaging * Engaging * Very engaging |

Question 2

|  |
| --- |
| I left this learning activity with increased knowledge about tools or practices that are relevant for my area of work.   * Strongly disagree * Disagree * Agree * Strongly agree |

Question 3

|  |
| --- |
| This learning activity shared techniques for [insert topic] and provided a space to practice in real time.   * Strongly disagree * Disagree * Agree * Strongly agree |

Question 4

|  |
| --- |
| This learning activity drew upon participants’ own experiences to learn from one another.   * Strongly disagree * Disagree * Agree * Strongly agree |

Question 5

|  |
| --- |
| I feel this learning activity expanded my understanding of [insert topic].   * Strongly disagree * Disagree * Agree * Strongly agree |

Question 6

|  |
| --- |
| I see myself using something I learned today in my organization.   * Yes * No * Maybe |

Question 7

|  |
| --- |
| I feel the structure of this learning activity (length, number of speakers, breakout rooms, etc.) allowed for optimized engagement and learning.   * Strongly disagree * Disagree * Agree * Strongly agree |

Question 8

|  |
| --- |
| What did you enjoy about the structure or content of this learning activity?  [enter response] |

Question 9

|  |
| --- |
| What would you change about the structure or content of this learning activity?  [enter response] |

Question 10

|  |
| --- |
| Please share one idea discussed in the learning activity that resonated with you the most.  [enter response] |

Appendix D: Activity Planning Template

| Date | Activity | Purpose | Person assigned | Notes |
| --- | --- | --- | --- | --- |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Participant spotlight #X: [topic] |  |  | Goal: Participants will contribute to their peer learning cohort by sharing challenges, successes, and practices in a given area of work. Participants not presenting will provide feedback, share thoughts, and learn from their peers so that they can adapt what they learn for their organizations. |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Town hall |  |  | Goal: Participants will have an opportunity to anonymously submit questions for a [name of speaker/organization] or [name of speaker/organization] to respond to. The objective of this learning activity is to provide a space for participants get their questions answered about [topic] and facilitate dialogue between [name of speaker/organization] and [participants]. |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Participant spotlight #X: [topic] |  |  |  |
| XX/XX/XXXX | Webinar #X: [topic] |  |  | Goal: Participants will learn from invited speakers on topics they are struggling with or have not yet started working on. Participants will apply what they learn to their practices. |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Webinar #X: [topic] |  |  |  |
| XX/XX/XXXX | Webinar #X: [topic] |  |  |  |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Webinar #X: [topic] |  |  |  |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Retreat |  |  | Goal: This cohort retreat with multiple sessions will explore and improve the participants’ use of [topic] in their work in a variety of areas [insert example areas]. Facilitators will allow space for participant-initiated topics or work sessions. |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Participant spotlight #X: [topic] |  |  |  |
| XX/XX/XXXX | Webinar #X: [topic] |  |  |  |
| [Month] [Year] | | | | |
| XX/XX/XXXX | Webinar #X: [topic] |  |  |  |
| XX/XX/XXXX | Cohort celebration |  |  | Goal: Leaders from facilitating team will share some closing remarks and encouragements. Participants will briefly share their successes, lessons learned, next steps, and plans for sustainability. |

Appendix E: Example Learning Activity Structures

Spotlight

Purpose: Participants will contribute to their peer learning cohort by sharing challenges, successes, and practices in a given area of work. Participants not presenting will learn from their peers so that they can adapt what they learn for their organizations.

* Choose number of spotlights and topics relevant to the participants’ work.
* Create a Google Form (or other sign-up system) with the [number] topics for participants to choose from.
* Send questions to the speakers about a month in advance of their spotlight. This allows them to meet with staff, create talking points or a presentation, and identify resources they would like to share with the group. For example:
* Please give an overview of how your organization navigates [topic]
* What challenges have you faced?
* What successes have you experienced?
* What tools (templates, reports, best practices) can you share with your peers to help them better navigate [topic]?
* Conduct dry run and prep call one week in advance of the spotlight.This allows speakers to practice timing and work out any kinks, and it confirms for facilitator staff that what the speakers are sharing is in line with and complements the topic.
* Sample spotlight structure:
* Duration: 1 hour
* 00:00-00:05 Welcome & Introductions of speakers
* 00:05-00:15 Speaker #1
* 00:15-00:25 Speaker #2
* 00:25-00:35 Speaker #3
* 00:35-00:55 Q & A and discussion led by speakers
* 00:55-1:00 Closing remarks from facilitator and next steps (transition to learning pods if they are occurring during the same learning activity)

Webinar

Purpose: Participants will learn from invited speakers on topics they are struggling with or have not yet started working on. Participants will apply what they learn to their practices.

* Choose webinar topics.
* Identify and contact speakers or outside subject matter experts.
* Draft email to send to speakers and experts. This email should include project background, a list of the participants, the topic we are seeking to address, and the logistics of the meeting.
* Conduct planning call with the speaker and experts. This allows for the speakers and experts to ask questions about what they should focus on and share a rough outline of the talk, and for the facilitator to ask questions.
* Sample webinar structure:
* Duration: 1.5 hours
* 00:00-00:05 Welcome & Introductions of speakers
* 00:05-00:35 Presentation
* 00:35-00:55 Q & A
* 00:55-1:00 Break/transition/flex time
* 1:00-1:25 Breakout rooms with questions/activity assigned by speaker
* 1:25-1:30 Report-out and closing remarks

Appendix F: Learning Activity Flyer Template

Capacity Building for Strategic Learning Cohort:   
Learning Activities Overview

Goal #1: [Insert goal]. [Insert a statement explaining how this goal relates to the project or program].

Example: Increase participants’ strategic learning capacity. The program aims to improve participants’ ability to regularly measure, interpret, and use data to inform their strategic decisions, a set of efforts we refer to as strategic learning. Past work with the foundation has revealed three sets of capacities that drive strategic learning: hypothesis development (theories about the causal relationships between levers and impact, and clarity on how to measure and test these assumptions); technical capacity (organizational practices and systems to collect, store, and analyze data); and innovation capacity (the ability to use data for decisions).

|  |  |
| --- | --- |
|  | Objective #1:  [Insert a statement that explains how Goal #1 will be accomplished].  Example: A series of five webinars by subject matter experts on topics related to equity and strategic learning will improve the grantees’ hypothesis development, technical capacity, and innovation capacity. These webinars will achieve this by providing the scaffolding and knowledge necessary for grantees to enhance their decision making, organizational practices, and research processes. |

Goal #2.[Insert goal]. [Insert a statement explaining how this goal relates to the project or program].

|  |  |
| --- | --- |
|  | Objective #2:  [Insert a statement that explains how Goal #2 will be accomplished]. |

Goal #3.[Insert goal]. [Insert a statement explaining how this goal relates to the project or program].

|  |  |
| --- | --- |
|  | Objective #3:  [Insert a statement that explains how Goal #3 will be accomplished]. |

Capacity Building for Strategic Learning Cohort:   
Learning Activity Formats

Format 1: Participant spotlights

|  |  |
| --- | --- |
| Lightbulb with solid fill | [Revise as appropriate:] Speakers will contribute to their peer learning cohort by sharing their experience on a given area of work. Participants who are not presenting will provide feedback, share thoughts, and learn from their peers so that they can adapt what they learn for their organizations. Each speaker will give a presentation that answers these questions:   * [insert question] * [insert question] * [insert question] |

|  |  |
| --- | --- |
| [Speaker name] | [Presentation title]  [date] [time, time zone] |
| [Speaker name] | [Presentation title]  [date] [time, time zone] |
| [Speaker name] | [Presentation title]  [date] [time, time zone] |

Are you interested in being a speaker for one of the spotlights? Each presentation will be approximately [length of time]. Please fill out [insert hyperlink onto “evaluation form”] expressing interest by [deadline]. **The deadline to volunteer for the first spotlight is** [date].

Format 2: Town hall

|  |  |
| --- | --- |
| *Customer review* | [Revise as appropriate:] Participants will have an opportunity to anonymously submit questions for a [name of speaker/organization] or [name of speaker/organization] to respond to. The goal of this learning activity is to provide a space for participants get their questions answered and facilitate dialogue between [name of speaker/organization] representative(s) and [participants]. |

|  |  |
| --- | --- |
| [name] Town hall | [date] [time, time zone] |

Please submit your questions using [insert hyperlink onto “sign-up form”] by [date].

Format 3: Webinars

|  |  |
| --- | --- |
| Social network with solid fill | [Revise as appropriate:] Participants will learn from invited speakers on topics they are struggling with or have not yet started working on. Participants will apply what they learn to their practices. |

|  |  |
| --- | --- |
| [Speaker name]  Webinar #1 | [Presentation name/topic]  [date] [time, time zone] |
| [Speaker name]  Webinar #2 | [Presentation name/topic]  [date] [time, time zone] |
| [Speaker name]  Webinar #3 | [Presentation name/topic]  [date] [time, time zone] |
| [Speaker name]  Webinar #4 | [Presentation name/topic]  [date] [time, time zone] |

Format 4: Retreat

|  |  |
| --- | --- |
| Cheers with solid fill | [Revise as appropriate:] Participants will come together virtually to take a deep dive into [insert topic], hear from [name of speaker(s)], workshop parts of their projects, and build relationships with peers. |

|  |  |
| --- | --- |
| [name] Retreat | [date] [time, time zone] |

Format 5: End-of-project celebration

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| --- | --- |
| Handshake with solid fill | [Revise as appropriate:] Project leaders from [name of facilitator] will share some closing remarks and encouragements. [Participants] will briefly share their successes, lessons learned, next steps, and plans to sustain their work moving forward. |

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| Project celebration | [date] [time, time zone] |

Appendix G: Virtual Meeting Design Template

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| This meeting design template was created to be adaptable for facilitating various learning activities. Creating this template was an iterative process as new needs arose. We identified key components that were important to have planned before a meeting, including times, agenda items, and content and logistics. However, that is not an exhaustive list, and facilitators can adapt this template as they see fit. |

[Title of Learning Activity]

[date] from [time] to [time, time zone]

Location: [virtual (include link) or in person]

Presenting: [names of facilitators]

Participating: [names of participants]

Meeting objective: [outline the format and purpose of the meeting]

| Key for meeting design | Notes for facilitator(s) | High-level agenda: Key times and activities |
| --- | --- | --- |
| When creating a shared meeting design, it is important that all editors and viewers understand the typography. As you fill out this template, incorporate these elements:   * **Bold** – **bold any names so that they stand out and can easily be seen. This will help everyone quickly identify who should be doing what and when.** * *Italics – italicize all actions to differentiate them from talking points. For example, the command* “start recording” *should be italicized to ensure this action is completed.* | * If participants are not asking questions during any of the Q&A sessions, feel free to identify and ask questions you think it would be good for the participants to hear. * Provide links for any materials before the meeting, as well as in the chat during the meeting, if necessary. * Embrace honesty and vulnerability when discussing complex challenges. * Use participant feedback from previous meetings, if applicable, to improve your meeting. * [insert other relevant notes]   Roles and responsibilities:   * [name] – moderator * [name] – tech point person * [name] – slides * [name] – manage chat * [name] – take attendance | 12:00 – 12:03 Join meeting (if virtual, invite participants to join early),  welcome everyone, go over meeting norms 12:03 – 12:04 Purpose  12:04 – 12:05 Agenda  12:05 – 12:45 Main content  12:45 – 1:00 Next steps |

Virtual Meeting Agenda (this should align with the high-level agenda above)

| Time (EST) | Agenda item | Facilitator | Content and logistics | Notes |
| --- | --- | --- | --- | --- |
| 11:50 | Join meeting | All facilitators and participants | *Join video conferencing platform at least 5 to 10 minutes before the learning activity starts to set up and ensure all host and cohost functions are working well.*  *As participants join, start with verbal icebreaker – favorite thing about summer!*  [name of slides person] *displays welcome slide* | Facilitator staff should log in to their video conferencing accounts before launching the webinar. Encourage participants to join a few minutes early to make sure their technology is working.  [insert and re-insert links into the chat as participants join] |
| 12:00-12:02 | Join meeting | All facilitators | [Name of tech point person] *starts recording*  *Welcome participants as they join the call.*  [name] *displays slide 2, “Meeting Norms”* |  |
| 12:02-12:03 | Welcome | [name of moderator] | [insert introductory welcome statement]  [insert speaking points for meeting norms]  [name] *return to welcome slide*  [insert speaking points for the introduction] |  |
| 12:03-12:04 | Purpose | [name] | [name] *displays slide 3, “Purpose”*  [insert purpose statement and speaking points]  [name] *flips to slide 4, “Speakers”*  Introduce speakers.  [name] *put link to bios of speakers in chat (if applicable)* |  |
| 12:04-12:05 | Agenda | [name] | [name] *displays slide 5, “Agenda”*  [insert agenda speaking points] | Remind participants that they can put questions in the chat. |
| 12:05-12:45 | Main content | [name] | [name] *displays next slide (If first speaker is not from the facilitator, they can share their screen instead).*  [insert main speaking points]  [name] *shares screen and flips through slides*  [insert main speaking points]  \*continue same format for each speaker as needed | If multiple speakers, discuss before who will be manage slides and screen sharing—the designated slides person or the current speaker.  To make sure speakers stay within their allotted time, remind speakers when they have two minutes left. |
| 12:45-1:00 | Next steps | [name] | [name] *shares screen and displays a wrap-up slide*  [insert concluding remarks]  [name] *stops sharing screen*  *Facilitate Q&A.*  [insert prepared questions]  [name] *shares screen and displays “Thank you!” slide*  [insert final speaking points]  [name] *provide link(s) to additional resources or a post-event evaluation form in chat*  *Ask participants to provide feedback by completing a survey.*  *Thank participants for joining.*  *Follow up with participants by sharing the slides and a link to the evaluation in an email after the activity.* | If having a Q&A, determine ahead of time whether it will be moderated or unmoderated. If moderated, prepare questions or read questions from the chat. If unmoderated, prepare to keep track of timing. If too chaotic, use the “raise hand” function on the video conferencing platform. |

Appendix H: “Parking Lot” for Activity Ideas

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| **Topic ideas** |  |
| **Structure ideas** |  |
| **Other ideas** |  |

Appendix I: Poster Template

|  |  |  |
| --- | --- | --- |
| [Participant Name] | | |
|  | | |
| [insert image]    [name] | [insert image]    [name] | [insert a brief bio about the participant] |
|  | | |
| What was [participant name]’s initial scope and where are they now? | | |
| Scope: [insert organization’s scope] | | |
| Updates and progress: [insert statement] | | |
|  | |  |
| What is [participant name] good at? | | |
| [insert answer] | | |
|  | |  |
| What would [participant name] like to learn from others? | | |
| [insert answer] | | Briefcase |

Appendix J: Learning Pods

A learning pod is a way of organizing participants in a cohort that allows them to build lasting, working relationships with other participants. The objective of learning pods is for participants in each pod to learn about one another’s organizations, share challenges with one another, collaborate on expert-assigned homework activities, and prepare next steps together. The learning pod can serve as a discussion-based space for participants to learn from one another in addition to the more formal learning activities. Tying into our guiding values, we saw the learning pods as an opportunity to provide choice to participants, focus on equity by giving space to promote the voices of the participants, and add value by enabling participants to learn collaboratively.

Below are guiding steps you can take to organize and incorporate learning pods into your learning activities, as well as tips for facilitating the learning pods:

* Sort participants into learning pods that they will remain in for the duration of the initiative. Be intentional about incorporating the guiding values and goals of the initiative into how they approach grouping participants. The [name of facilitator] will sort the participants into [number] learning pods based on any of the following criteria:
* Similar mission/work
* Struggling or succeeding with the same things
* Geographic location
* Population served
* Learning pods will meet[number] times over the course of the project.A stable schedule over the course of the project is way for participants to build meaningful and hopefully long-lasting relationships with one another. As a guiding value, consistency in the learning pods can help keep participants engaged.
* The activities are based on what would be needed to help participants build a working relationship before starting their work.As pod participants take time to introduce themselves and get to know their general challenges, they should be able to work more honestly, openly, and efficiently in later cohort sessions.
* [Name of facilitator] staff members will be assigned to a pod: Participants might feel more comfortable speaking with one another and being open if they have a consistent [name of facilitator] facilitator. It might be helpful if this facilitator is the staff member who does their monthly check-ins.

Pods can occur in the same meeting as the spotlights, webinar, or listening session, or separately; attaching the pods to the other learning activities ensures participants have a consistent time commitment each month. Some participants might like grouping everything together, which would be easier in terms of scheduling. However, long virtual meetings can also be exhausting. Holding learning pods and other activities separately each month is another option that could allow for more continuity and for participants to see one another more often. Grouping activities together might work especially well for the expert sessions in which the expert would be providing an activity. The bottom line is for you as a facilitator to be consistent in whichever approach you choose—doing so allows participants to know what to expect and prepare accordingly.