The following are examples of messaging that facilitators can use when socializing CLA and the self-assessment and action planning process. This document also includes sample calendar invitation text and talking points for the self-assessment and action planning sessions. Please note that these are suggestions only; facilitators should feel free to tailor them as needed

PRE-SESSION SOCIALIZATION MESSAGES

ABOUT THE PROCESS

- USAID and our partners are better equipped to achieve our development objectives when programming is coordinated, based on evidence and learning, and adjusted as needed throughout implementation. Finding the time to figure out what this means for us and how to put it into practice can be challenging.

- The CLA Self-Assessment and Action Planning workshop will be an opportunity for us to have a frank conversation, reflecting on our current practice related to collaborating, learning and adapting as well as the enabling conditions that can further strengthen our development efforts.

- This is an important [Mission] priority, that will help us implement our work in accordance with the recently revised ADS 201 Program Cycle guidance that puts new emphasis on continuous learning in support of adaptive management.

FOR CALENDAR INVITATIONS

- **SELF-ASSESSMENT SESSION:** This facilitated session will help you to gain a deeper understanding of how your Office is already operationalizing CLA, where you may have gaps, and how you can intentionally build on existing efforts to improve your work environment, processes, and development outcomes.

  Teams use the CLA maturity tool—a card deck that describes various stages of CLA maturity—to prompt a conversation about what you're currently doing around CLA and where you would like to improve or build on these practices, and determine the aspirational future state for your CLA practice.

- **ACTION PLANNING SESSION:** Following on the [Date] CLA Self-Assessment session, this session will take your team through a facilitated exercise to help you identify the most important follow-up actions. You will come out with a clear action plan for how to move forward on CLA.

ABOUT CLA

" Collaborating, learning, and adapting (CLA)—USAID's approach to organizational learning—is a way to operation-alize adaptive management throughout the Program Cycle. By integrating CLA practices appropriate for their context and building conducive enabling conditions, USAID and its implementing partners can become stronger learning organizations capable of managing adaptively."

" We know from talking with staff in the field and from evidence that we're more effective when we collaborate strategically, learn intentionally, and adapt appropri-ately. We've seen this through cases of strong collaboration between internal and external partners, evaluations and other sources of knowledge used to inform programming decisions, and flexible designs that are able to respond to changing contexts."

" USAID is increasing focus on intentional CLA, as evidenced by the expanded guidance on CLA in the updated Program Cycle guidance. For example, CLA Plans and MEL Plans are now required components of a mission's work, as a way to strengthen adaptive management capacity and in recognition that we work in complex, often-changing contexts that require the ability to shift when necessary."

SESSION TALKING POINTS
CLA INTRODUCTION

- Collaborating, learning, and adapting aren't new for USAID or to you. CLA is **not a different work stream** or done for its own sake. It's a different way of approaching our work; making our work as effective as possible; maximizing development impact. [If you know them, add examples of CLA that participants are already doing.]

- CLA can seem like a nebulous concept, leading people to ask "what does CLA look like?" USAID's CLA Framework identifies key components and subcomponents of daily work within USAID that can be opportunities for **intentional, systematic, and resourced CLA** attention.

- Basically, CLA asks, **"Do you take the time to think critically about your work? Are you strategic in who you collaborate with, what you're learning, and do you adapt accordingly?"** That's "CLA in the Program Cycle"— how CLA shows up in your programming and day-to-day work. The other dimension is the Enabling Conditions—**how we do things here and what is the culture at the Mission**. Those enabling conditions of culture, processes and resources are equally important, because, as we say, **CPR (culture, processes, resources) keeps CLA alive**.

SELF-ASSESSMENT PROCESS

- The maturity tool uses USAID's CLA Framework to help teams focus in on what you are doing well already, where you want to improve, and out of that, what you want to prioritize. It's not meant to do everything at once, but really **identify a few key tweaks** that will be helpful for your work right now.

- Maturity stages help you **articulate where you are now and where you may want to go** with a specific topic. They range from Not Yet Present to Institutionalized.

- Everyone will get their own mini-deck and you'll have the opportunity to choose why you feel your team is at a given stage and share your thoughts with the group. It's **okay to *feel* where you are, but if you can provide an example** that supports your selection it can help everyone better understand each other's perspectives.

- **This is not a test or an evaluation.** We ask you to think critically and be open about what's working and what's not working. This process is meant to interactive and informal. The richer the conversation the more useful the exercise will be.

- This process may feel unusual, even uncomfortable, at times. We ask only three things of you: first, that you **trust the process**, which has evolved through engagement with more than a dozen missions. Second, that you bring an **open and honest mindset** to this discussion; we're all here to improve development results. And third, that you welcome this as a Pause and Reflect moment in the middle of your busy work lives; **have some fun!**

- [Based on decisions made during pre-planning, add a talking point about how the information will be captured, used, and shared.]

ACTION PLANNING PROCESS

- The goal is to brainstorm and then prioritize ideas that will **move us from the current stage toward our aspirational stage** on the subcomponents that we self-assessed.

- Ideas should be **as concrete as possible**. So, not "pause & reflect more," but "hold AARs after major activities" or "dedicate 30 minutes of one team meeting a month to discuss a learning question."

- It is critical to **be realistic about what the team can take on**, given our context, time commitments, and current resources.

- This is not the end of your CLA action planning; it is just the start. We want to familiarize you with this as a process, so that you have **a new tool in your arsenal**; in fact, we'll be leaving a complete Maturity Tool deck behind.

- [Based on decisions made with leadership during pre-planning, add a talking point on the accountability mechanism you will use to check on how implementation of the action plan is going.]