

## **2018 MERLIN Convening**

Monitoring, Evaluation, Research and Learning Innovations Program (MERLIN), USAID Global Development Lab (the Lab)

### Agenda

#### Key assumptions:

- Approximately 21 participants from consortia plus about 12 from USAID (~33 total plus 2 facilitators)
- One 30-minute break in the morning and afternoon; 1 hour for lunch (based on feedback from 2017 that participants want more unstructured time to connect with peers)
- Assigned seating at the start of first day to support mixing between consortia
- Day 1: Plus/Delta evaluation at the end of the day to inform any changes to Day 2
- Day 2: Paper evaluations in the room for the end of the day
- Day starts at 8am with ~45 minutes for registration/breakfast; ends at 5pm

#### Objectives

- Provide updates and answer questions on USAID issues regarding reorganization, funding, and relevant policy/guidance matters
- Take stock of achievements and challenges facing MERLIN interventions from perspectives of USAID, clients and consortium members
- Begin to plan priority activities for the next year of MERLIN, including knowledge sharing, knowledge management and dissemination
- Brainstorm key issues and messages to inform USAID leadership decisions on budget, resources and decision-making for the future of innovative MERL interventions by the Agency

#### Set up

- Slide deck
- On tables: markers, post-its, pens, table toys, snacks
- Other materials: Construction paper, appropriately colored Post-its and notecards for exercises
- 4-6 tables depending on size
- 2 tables for facilitator materials, notetaking
- A/V, microphones
- Program Cycle poster

Day 1: Taking Stock		
Time	Morning: Reconnecting and Updates	Materials/ notes
8:00am - 9:00am	<p><b>Registration</b></p> <ul style="list-style-type: none"> <li>- Sign-in sheet</li> <li>- Name tags</li> <li>- Table tents (provided by the venue)</li> <li>- Participant agendas</li> <li>- List of lunch spots</li> <li>- Seating arrangement (on registration form)</li> </ul>	
9:00am - 9:15am	<p><b>Welcome and Objectives</b></p> <ul style="list-style-type: none"> <li>● Provide updates and answer questions on USAID issues regarding reorganization, funding, and relevant policy/guidance matters</li> <li>● Take stock of achievements and challenges facing MERLIN interventions from perspectives of USAID, clients and consortium members</li> <li>● Begin to plan priority activities for the next year of MERLIN, including knowledge sharing, knowledge management and dissemination</li> <li>● Brainstorm key issues, arguments and messages to inform USAID leadership decisions on budget, resources and decision-making for the future of innovative MERL interventions by the Agency</li> </ul> <p><b>Housekeeping</b> Agenda</p> <p><b>Round-Robin Introductions</b></p> <ul style="list-style-type: none"> <li>- Name, role, organization</li> <li>- More meet-and-greet later this morning</li> </ul>	

9:15am - 10:00am	<b>Introduce Leadership</b> <ul style="list-style-type: none"> <li>● Update from USAID (20 min)</li> <li>● Q&amp;A (25 min)</li> </ul>	
10:00am -10:20am	<b>Icebreaker: Change!</b>  Exercise - 10 min <ul style="list-style-type: none"> <li>- Designed to be a riff on the game of musical chairs; participants stand on squares of construction paper placed on the floor. At quick intervals, facilitators call out “change!” and participants must move to a new square. At the same time, the facilitators remove squares of paper from the floor as people are moving.</li> <li>- Go through several rounds until there are few squares left.</li> </ul> Debrief - 10 min Illustrative questions: <ul style="list-style-type: none"> <li>- What did you notice about people’s behavior as the game went on?</li> <li>- What did you do when you noticed the squares being removed? What did you learn about your reactions to this situation?</li> <li>- What sorts of tactics did you see being employed?</li> <li>- How does this relate to situations you encounter in the workplace? What happens when people are faced with scarce or dwindling resources?</li> <li>- How have you seen this manifest in your working life/on your team?</li> <li>- What does this mean for how to best manage situations of scarcity or competition?</li> </ul>	Construction paper
10:20am -10:45am	<b>BREAK</b> Set up gallery walk posters	
10:45am -12:00pm	<b>Visual roadmap for the day (consortium/MERLIN/MERL)</b>  <b>Intro Gallery Walk</b>	Consortia sheets  Post its

	<p><b>One person from each consortia stays behind - ask for a volunteer from each (5 min)</b></p> <p><b>Gallery walk of each consortia “FaceBook” page (20 min)</b>  On each poster:</p> <ul style="list-style-type: none"> <li>- 3 key achievements from the past year</li> <li>- 2 ideas for how to make the most of the coming year</li> <li>- 1 hard-to-solve challenge</li> <li>- 1 question for the year ahead</li> </ul> <p>Post comments, “likes,” emojis (smiley faces, “100!,” hearts, stars, etc.)  Optional: Individual can take his/her own notes on observations, questions, surprises</p> <p><b>Small groups (20 min)</b>  Count off by 6 and go to tables</p> <p>Assign a notetaker from among participants at the table</p> <p>Sit in mixed groups and discuss</p> <ul style="list-style-type: none"> <li>- What key learning(s) did you pick up from the pages?</li> <li>- What commonalities, if any, did you notice? <ul style="list-style-type: none"> <li>- How people plan to use the next year?</li> <li>- Challenges to address?</li> </ul> </li> </ul> <p>Notetake capture key points on flipchart paper</p> <p><b>Move back to consortia groups (20 min)</b></p> <ul style="list-style-type: none"> <li>- To what extent did these conversations raise ideas for you about the coming year?  How to address a challenge? Any adaptations? Other observations?</li> <li>- USAID to distribute between tables</li> </ul> <p><b>Popcorn a few ideas from groups (5 min)</b></p>	<p>Markers</p> <p>Flipchart paper</p>
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12:00pm - 1:00pm	<b>LUNCH</b>	
<b>Afternoon: MERL of MERLIN</b>		
1:00pm - 1:10pm	<p><b>Energizer: Rearrange Tables According to Birth Month (5 min)</b></p> <ul style="list-style-type: none"> <li>- What makes your birth month the best? (1 min)</li> <li>- 5 groups <ul style="list-style-type: none"> <li>- January - February</li> <li>- March - May</li> <li>- June - July</li> <li>- August - September</li> <li>- October- December</li> </ul> </li> </ul> <p>Report out (3 min) Re-size groups as needed for balance and send to tables</p>	
1:10pm - 2:50pm	<p><b>Instrument for assessing effectiveness of new approaches in the MEL space/rubric 30 mins total (10 min)</b></p> <ul style="list-style-type: none"> <li>● Clarifying Q&amp;A (10 mins)</li> <li>● USAID to provide general feedback from management perspective (10 min)</li> </ul> <p><b>PPL survey results (45 min)</b></p> <ul style="list-style-type: none"> <li>- Include clarifying Q&amp;A</li> </ul> <p><b>Table discussion (10 min)</b></p> <ul style="list-style-type: none"> <li>- Point out specific findings, observations, surprises</li> <li>- <i>One key question per individual - record on a sticky note</i></li> </ul> <p><b>Report out a number of people; capture all ideas (20 min)</b></p>	Slides

	Answer some questions as we can in the room, depending on time. Capture and feed back to rest to PPL	
2:50pm - 3:10pm	<b>Break (review questions in case relevant to panel)</b>	
3:10pm - 4:10pm	<p><b>Client feedback panel discussion (30 min)</b></p> <ul style="list-style-type: none"> <li>● What about the MERL innovation is most compelling to operating units?</li> <li>● What is less compelling/more of a challenge to incorporate into existing program structures?</li> <li>● What kinds of data/information do teams within the LAB use/need for decision making? How was that used?</li> <li>● What advice would you give consortia to make it easier for OUs to collaborate with them?</li> <li>● To what extent did engagement with the consortia live up to your/the OUs expectations?</li> <li>● Other comments, observations, feedback? (All)</li> </ul> <p><b>Open Q&amp;A (30 min)</b></p>	
4:10pm - 4:30pm	<p><b>Reflections</b></p> <p><b>Take 5 minutes and write down on 2 colors of sticky notes</b></p> <ul style="list-style-type: none"> <li>- What is one big lesson/takeaway about what you want to carry forward as a consortium that is in your sphere of influence? (pink)</li> <li>- What is one thing you think the MERLIN consortium should carry forward that is in your sphere of influence as a group? (green)</li> </ul> <p>Plus/Delta on the day Conclusion</p>	<p>Large pink and green sticky notes</p> <p>Plus/Delta flipchart paper</p>

5:00pm - 8:00pm	<b>Happy Hour</b>	
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<b>Day 2: Looking Ahead</b>		
<b>Time</b>	<b>Morning: Making the most of the next year</b>	<b>Materials/ notes</b>
8:00am - 9:00am	<b>Breakfast</b>	
9:00am - 9:30am	<p><b>Welcome</b> Reminder of Consortium/MERLIN/MERL framing</p> <p><b>1 midnight/happy hour musing (30 sec x 30 people = 15 min)</b></p> <p><b>Review grouped responses - carry forward as MERLIN</b></p> <p>As a full group review facilitators' theming of the reflections from day 1 (MERLIN carry forwards). At this point just to take in, we'll use later this morning after we hear more from USAID.</p>	<p>Framing visual</p> <p>Will need to make posters of grouped responses from day 1 reflection</p>
9:30am - 10:20am	<p><b>Getting into focus - Put your MERLIN hat ON</b> How to focus the remaining time and core resources to meet the goals and objectives of USAID</p> <p><b>Context - Leadership (10 min)</b></p> <ul style="list-style-type: none"> <li>- Challenges on funding; uncertainty</li> <li>- Goal: maximize utility and relevance of MERLIN methods</li> <li>- What do you have in the pipeline? What are your plans for the next year?</li> <li>- What USAID needs in terms of reporting from consortia</li> </ul> <p><b>Mapping of Key Milestones and Goals (40 min)</b></p>	<p>Colored post-its (5 colors)</p> <p>Large wall calendar with month markers</p> <p>Payoff-Capability Matrix on a flip chart</p>



	<ul style="list-style-type: none"> <li>- In consortia groups, write down key deliverables, meetings/events, targets and other key moments over the next 12 months - one per post-it note (different colors for different consortia)</li> <li>- Post on large wall calendar</li> <li>- Gallery walk and report-out of highlights - Where are there overlaps? What are we already doing/creating?</li> <li>- Other observations?</li> </ul>	
10:20am -10:40am	<b>Break</b>	
10:40am -12:00pm	<p><b>Count off by 4</b></p> <p><b>Action planning</b></p> <ul style="list-style-type: none"> <li>- Coordination and commitments around shared learning, thought leadership, knowledge products and dissemination. The what and the how.</li> </ul> <p><b>Idea Generation and Prioritization (30 min)</b></p> <ul style="list-style-type: none"> <li>- Introduce Payoff Capability Matrix (2 min)</li> <li>- In mixed groups: If goal is “to maximize utility and relevance of MERLIN methods” then what are some ideas for activities you believe would fall in the high payoff/high capability box and why? Write top idea on flip chart. (15 min)</li> <li>- Report outs to full group (10 min). <ul style="list-style-type: none"> <li>- Can any ideas be combined?</li> </ul> </li> <li>- Dot vote on 1-2 ideas they want to take forward collectively. (5 min)</li> </ul> <p><b>Planning and Next Steps (50 min)</b></p>	<p>Payoff Capability Matrix</p> <p>WHO/WHAT/W HEN/FIRST STEPS matrix on the wall</p>

	<ul style="list-style-type: none"> <li>- Full group discussion to capture major areas of work that need to get done and discuss who could be responsible for what</li> <li>- Identify a few key areas of work and have smaller groups work on next steps - filling out a WHO/WHAT/WHEN/FIRST STEPS matrix on the wall</li> <li>- How will you hold each other accountable for these actions?</li> </ul>	
12:00pm - 1:00pm	Lunch	
<b>Afternoon: Beyond MERLIN</b>		
1:00pm - 1:15pm	<p><b>Energizer - Remember the pattern!</b></p> <ul style="list-style-type: none"> <li>- Each table stands up and forms a close circle.</li> <li>- One person starts by throwing the ball to someone in the circle, saying their name as they throw it.</li> <li>- Continue catching and throwing the ball establishing a pattern for the group. (Each person must remember who they receive the ball from and who they have thrown it to.)</li> <li>- Keep going for a few minutes</li> </ul>	Balls/table toys
1:15pm - 2:15pm	<p><b>Messaging for sustainability - Take your consortium hat OFF</b></p> <p><b>Introduction - Leadership</b></p> <ul style="list-style-type: none"> <li>- Opportunity to be thought leaders with us based on your knowledge and experience in this space</li> <li>- Be in an advocacy state of mind</li> <li>- Objective of the session: ideas to inform messages on the value proposition of MERL innovations given two possible futures</li> </ul>	Slide/flipchart showing two worlds

	<p><b>Scenario planning for two “worlds”</b></p> <ol style="list-style-type: none"> <li>1. MERL innovations are driven through a <b>centralized</b> hub of funding and champions</li> <li>2. MERL innovations are woven into agency activities and guidance (<b>decentralized</b>)</li> </ol> <p>Note: these two worlds are not mutually exclusive, but they would require variations in approaches, models, and practices to make them successful. We want to be prepared for either scenario.</p> <p><b>Brainstorming exercise</b>  <b>Small groups: Count off by 4 (assign USAID table facilitators) (40 min)</b></p> <p>Groups 1 and 2 will brainstorm around the <u>centralized</u> possibility</p> <p>Groups 3 and 4 will brainstorm around the <u>decentralized</u> possibility</p> <p><b>Consider your assigned scenario and prepare a 5-minute presentation (including writing key points on flipchart paper) that answers the following questions:</b></p> <ul style="list-style-type: none"> <li>- What is the name of your scenario (can be a phrase or the name of a song, movie, thing, etc.)?</li> <li>- What would be needed to make this model successful? Types of approaches, organization/structure, practices, models?</li> <li>- How would you frame messages/arguments to advocate for continued resources for innovative MERL in this world?</li> </ul>	
<p>2:15pm - 2:45pm</p>	<p><b>Small group report-outs (20 min)</b></p> <p><b>Discussion (10 min)</b></p> <ul style="list-style-type: none"> <li>- What similarities did you pick up from each of the worlds? Where are there synergies?</li> </ul>	

	<ul style="list-style-type: none"> <li>- Where do you see the biggest challenges facing innovative MERL?</li> <li>- What other key takeaways do you have from this exercise?</li> </ul>	
2:45pm - 3:05pm	<b>Break</b>	
3:05pm - 4:00pm	<p><b>Defining Key Messages - Give me your card!</b></p> <p><b>Not trying to finalize messages - come up with the best ideas to share back with USAID</b></p> <p>Given what you have heard, we will now work to succinctly frame the key messages for continued support for innovative MERL in each scenario. (5 min)</p> <p>Situation: You are heading into a meeting where a few key USAID leaders are discussing the future priorities of the agency. At a coffee break, one of the leaders with whom you have been talking suddenly says she is a late for another meeting and has to leave. She adds - we have been pleased with the work of the MERLIN consortium. Would you jot down on the back of your card 1 main point about how we can continue this work moving forward?</p> <p>You will have 1 minute to write your key message on the card. You can only write on one side, and please be sure it is very legible. (1 min)</p> <ul style="list-style-type: none"> <li>- Green card: centralized</li> <li>- Purple card: decentralized</li> </ul> <p>We are now going to sift out the messages you feel would be most convincing to USAID leadership to build their support for continuing innovative MERL approaches.</p> <p><b>25/10 Crowdsourcing</b></p> <ol style="list-style-type: none"> <li>1. Everyone will stand up</li> </ol>	<p>Green and purple note cards</p> <p>Pens/markers</p>

- a. Round 1. Mill around and share cards with other participants without reading them. This will mix up the cards. When the bell rings stop passing cards and pair up to exchange thoughts on the cards in your hands. Then participants individually rate the idea/step on their card with a score of 1 to 5 (1 for low and 5 for high) and write it on the back of the card. This is called "Read and Score."
- b. When the bell rings, cards are passed around a second time "Mill and Pass" until the bell rings and the "Read and Score" scoring cycle repeats. This is done for a total of five scoring rounds.
- c. At the end of cycle five, participants add the five scores on the back of the last card they are holding. Finally, the ideas with the top ten scores are identified and shared with the whole group

*Demonstrate one exchange-and-scoring interaction using a sample index card to clarify what is expected during the milling, namely no reading of the cards, only passing the cards from person to person so that each person has one and only one card in hand. The process can be confusing for some people. (2 min)*

**Begin exercise**

- Mill/pass/score (15 min)

**Find the best-scoring ideas with the whole group by conducting a countdown (5 min)**

- "Who has a 25?" Invite each participant, if any, holding a card scored 25 to read out the idea and action step. Continue with "Who has a 24?," "Who has a 23".... Stop when the top 5 decentralized, and top 5 centralized ideas have been identified and shared.

**Fine-tune selected messages (25 min)**

- Where is there overlap?
- What can be combined?
- Anything to add?

4:05pm - 4:30pm	<b>Reflections (at tables)</b> <ul style="list-style-type: none"><li>- I learned....</li><li>- I will ....</li></ul> Evaluation Thank you and conclusion	
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