

Facilitation Activities

- The following spreads walk you through the specific order of activities that will be used at the Summit.
- Please review it in advance of the event and plan to use it as a **field guide** while you are on site.
- The facilitation activities are **listed in the order they will be used**. Facilitation materials, like markers, charts, post-it notes, and pens will be provided.
- If you have any questions, or would like further clarification, please contact Dustin Stiver at The Sprout Fund (contact information can be found on page 2).

Let's Do It

DAY ONE

Facilitation Agenda

◆ Day One (4 hours, all participants)

1. Introduction: Learning Landscape 4C Matrix (30 min)
2. Current State of Badges Rose, Bud, Thorn (30 min)
3. Future State of Badges Affinity Clustering & Mad Libs (30 min)
4. How Can Badges Get Us There? Pathfinder (60 mins)
5. What Should We Do First? Impact/Effort Matrix (30 min)
6. Project Design Preliminary Concept Poster (30 min)

Take breaks as needed

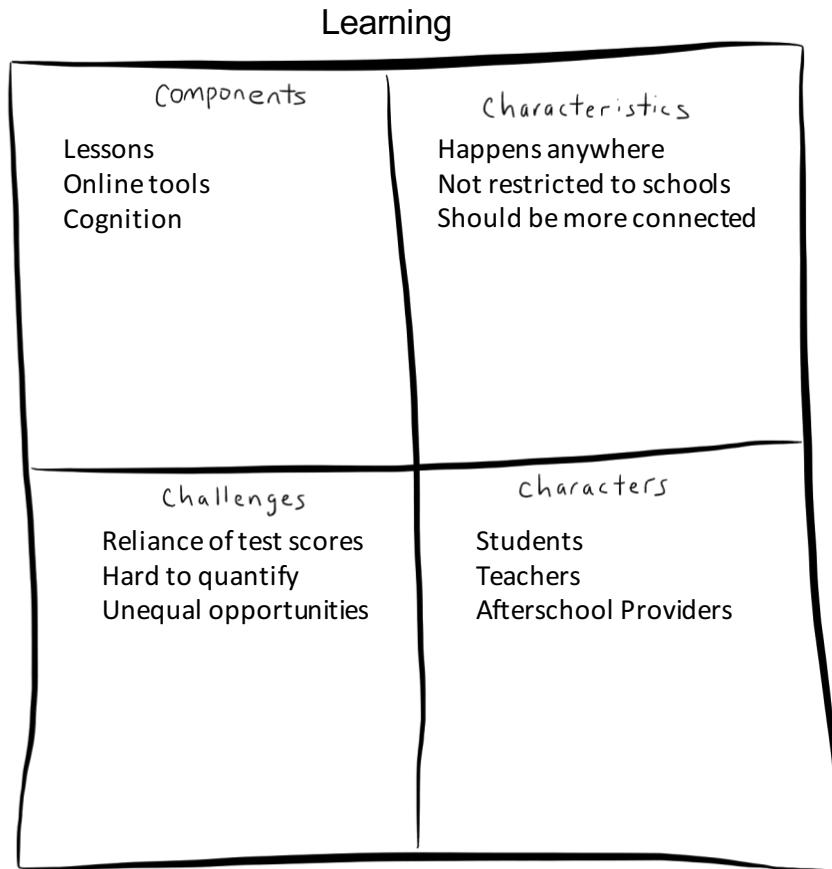
Times are approximate

Introduction:

Learning Landscape

4C Matrix

STEP 1
30 min



- Objective: quickly gather and organize information about how your working group views **learning** using four common key concepts
- Before the meeting, a 2×2 matrix will be drawn for you on a large white piece of paper with the following labels:
Components, Characteristics, Characters, and Challenges

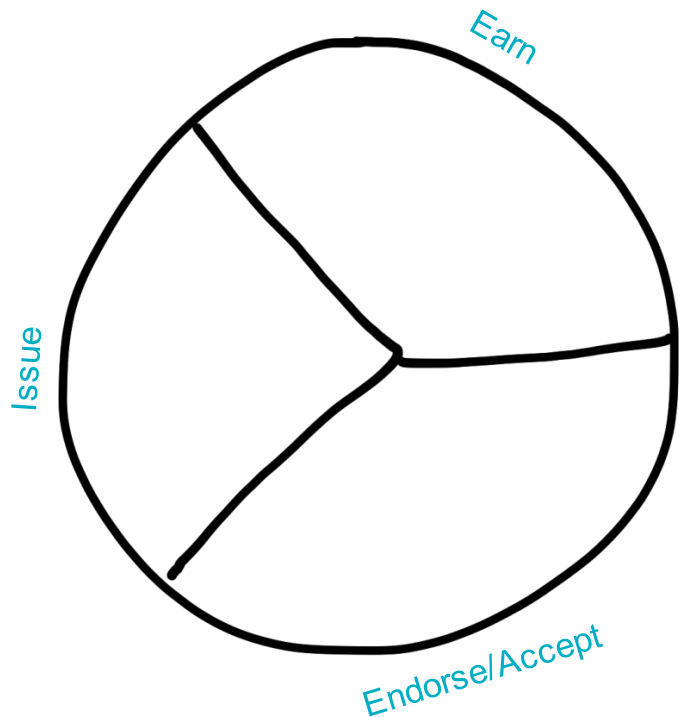
- Components are parts of the topic (e.g. process-oriented, mechanical attributes)
 - Characteristics are features of the topic (e.g. descriptive words associated with the subject)
 - Challenges are obstacles associated with the topic (e.g. identifiable barriers to success)
 - Characters are people associated with the topic (e.g. notable audience segments associated with the subject)
 - Introduce yourself and your role at the Summit – to be an impartial facilitator intent on creating a respectful and productive working environment.
 - Mention who you are, where you are from, what you do, and **your affiliation to The Sprout Fund** – *“Sprout is leading Pittsburgh’s transformation by supporting innovative people and their ideas – learn more at sproutfund.org”*
- Give each group member **4 post-it notes – 1 for each category**
 - Ask them to **think broadly about learning** and write down one idea for each category (**Don’t include badges yet!**)
 - Then have group members **introduce themselves one by one** while they talk about their ideas
 - Keep the introductions quick and to the point
 - No grandstanding – there will be plenty of time to pitch personal project ideas



Current State of Badges

STEP 2
30 min

Rose, Bud, Thorn & Affinity Clustering



Endorse/Accept

ROSE

BUD

THORN

- Objective: identify the positives, negatives, and opportunities as they relate the current state of badging (and create **3-5 clusters of post-its** that will be used in the next activity)
- Before the meeting, a pie chart will be drawn for you on a large white piece of paper
- The diagram will be labelled with three categories: **Issue**, **Earn**, and **Endorse/Accept**

- 🟢 **Roses:** what's going well
- 🟢 **Buds:** what has potential to be transformative
- 🟢 **Thorns:** obstacles in our way

- 🟢 **Issue:** those who give badges
- 🟢 **Earn:** those who receive badges
- 🟢 **Endorse/Accept:** those who recognize, assign, accept, or add value to badges

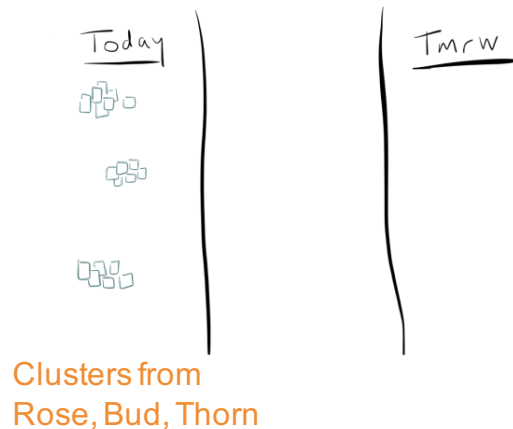
- 🟡 Give each participant **6 post-it notes – 2 of each color**
- 🟡 Instruct them to **identify roses, thorns, and buds** that relate to their interests in badges and learning
- 🟡 When complete with the individual activity, **have them get up and place them on the pie chart** in the pre-determined audience categories
- 🟡 Encourage participants to read what people wrote and **cluster post-its** within the audience categories
- 🟡 Try to match related roses, buds, and thorns together
- 🟡 Also look for instances when one person's rose is another's thorn
- 🟡 Help them identify commonalities across audiences (3-5 clusters)
- 🟡 **This exercise should focus on how badges relate to the topic at hand**

Future State of Badges

STEP 3
30 min

Mad Libs & Today → Tomorrow

Fig 1



- **Objective:** Use the 3-5 clusters that emerged during the last activity to devise forward-thinking, future-oriented statements on cards that will be affixed to the “Tomorrow” column
- The Today → Tomorrow framework assesses the current state of the working group topic area and envisions an ideal one that can happen in the future (with badge projects)
- Move the Rose, Bud, Thorn clusters that you identified from the pie chart into the **Today column** (Fig 1)
- If there are too many clusters on the pie chart, **help the group prioritize the top 5**. If there are too few clusters on the pie chart, **build at least 3 clusters** before moving onto the next step

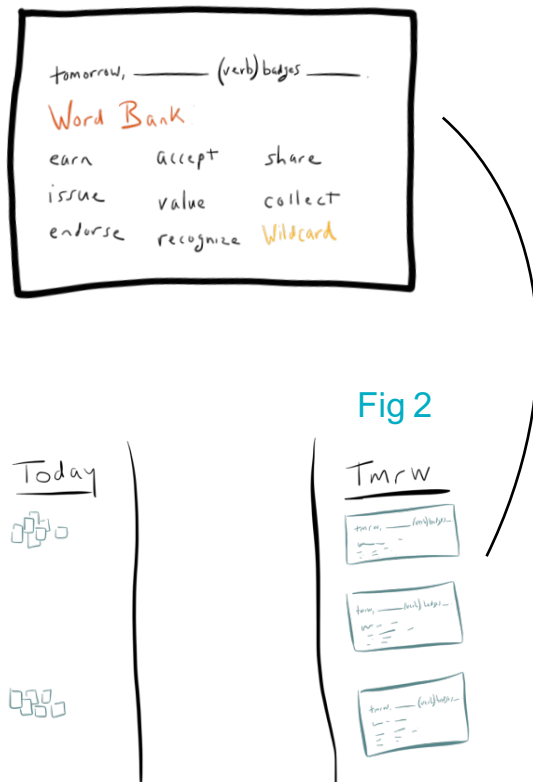


Fig 2

- A set of 12 Mad Lib-like cards will be placed in the center of the table with various verb constructions, like:

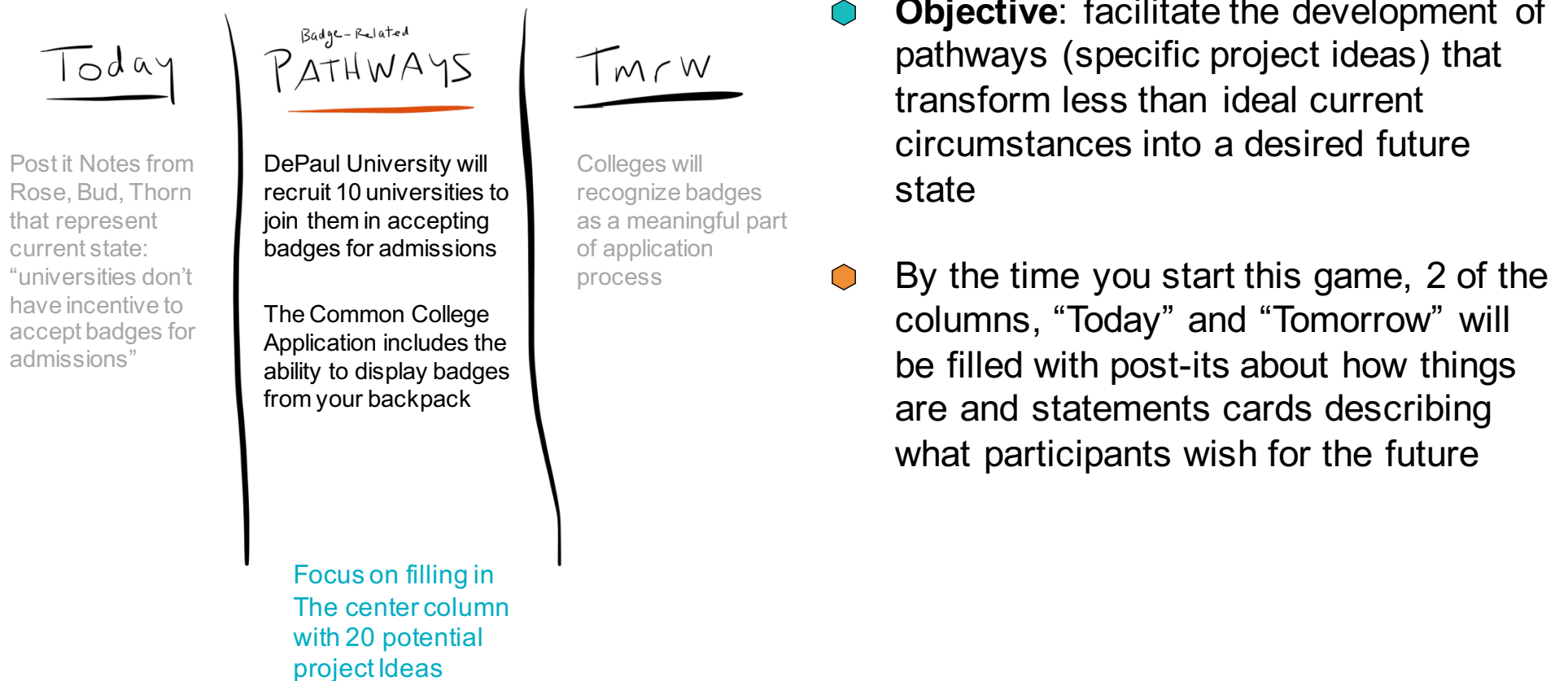
Tomorrow, _____ will (earn) badges _____.
- Ask participants to **work on their own to construct 1 statement** that transforms the topic of a Rose, Bud, Thorn cluster of their choice into an **action-based outcome**
- Once they have completed their statement, **the card should be affixed to the Tomorrow column** on the chart across from the relevant cluster of post-its (Fig 2)
- It is okay if multiple statements are associated with same cluster

How Can Badges Get Us There?

STEP 4
60 min

*You will need to write
this heading yourself!*

Pathfinder



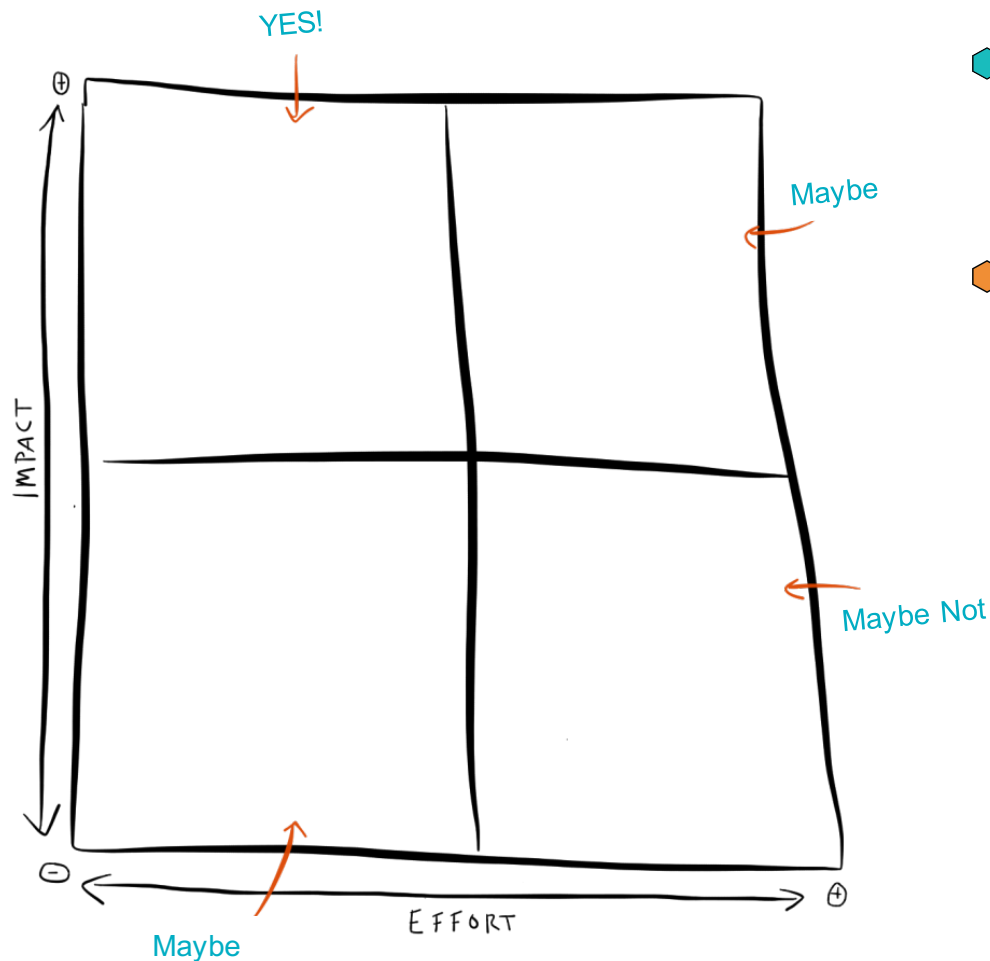
- **Brainstorm pathway projects** that would bridge the gap between where participants think they are and where they want to go
- Instruct participants to focus on what they can do and ways that they can leverage their power, influence, and expertise – *the goal is not to create projects for others to do*

- This is a generative group activity, it is **not necessary to prioritize** the pathways at this stage
- The goal is to **develop 20ish pathways** – you can have more than one pathway for each statement
- **Actively facilitate the collective development of pathways** as a group
- **Write each project idea on a 4x6” post-it note and place it in the center column** between the related cluster and statement card

What Should We Do First?

STEP 5
30 min

Impact/Effort Matrix



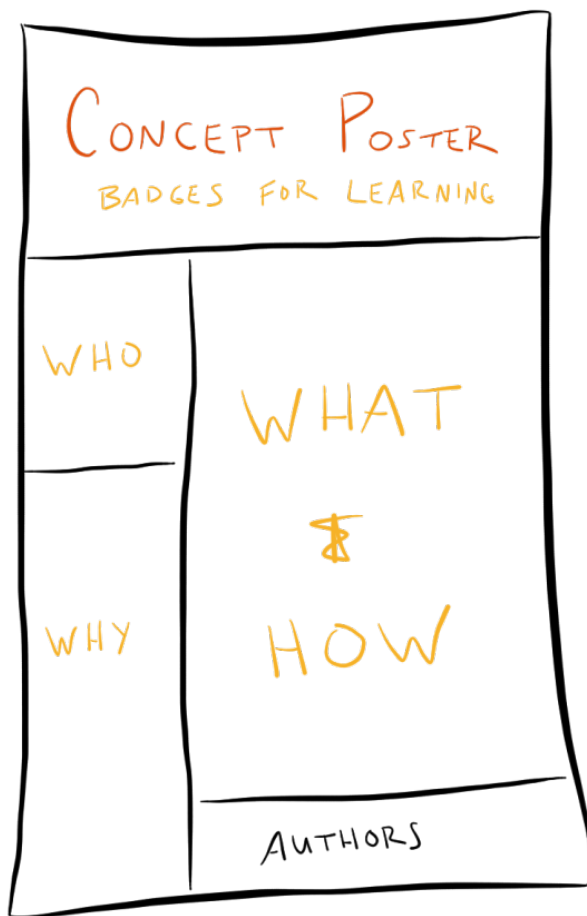
- 🟡 **Objective:** compare and contrast project ideas based on two criteria: Effort and Impact
- 🟡 Before the meeting, a matrix will be drawn for you on a large white piece of paper. The x-axis will be labelled “Effort” and the y-axis will be labelled “Impact”

- ⬢ This map is designed to prioritize competing project ideas.
- ⬢ **Low Effort & High Impact** ideas should be immediately put into action
- ⬢ **High Effort & Low Impact** project ideas should be shelved
- ⬢ **High Effort & High Impact** are worth greater consideration
- ⬢ **Low Effort & Low Impact** are possibly worth pursuing

- ⬢ (Ask one participant to **summarize the pathways from the last activity onto new, smaller post-its**)
- ⬢ For each rewritten post-it, help the group **determine which quadrant the project idea best fits into**, based on the quadrant rules
- ⬢ **All 20ish pathways** from the last activity should be placed into this chart
- ⬢ **Read them aloud and have the group help you place them** in the appropriate place on the chart

Project Design

Preliminary Concept Poster



- ❖ **Objective:** get participants thinking about the major elements of a project plan: What, How, Who, Why, etc.
- ❖ Before the meeting, Concept Poster Templates on 8.5x11 paper will be created for distribution to the group at this time

- ❖ The poster asks participants to consider and present information regarding **what** a project intends to do, **how** the participants think it can be done, **who** needs to be involved, and **why** the project should be undertaken
- ❖ Posters can be customized as needed. Other potential categories include: **Goals, Metrics, and Needs**
- ❖ **Encourage participants to pair up and choose a viable project** from the matrix
- ❖ The teams should **discuss the major elements** of the poster
- ❖ Moderators can assist project teams by asking pointed questions such as “*Who will this project impact the most?*” or “*Why is this project important to undertake?*”
- ❖ If there is time, have the participant teams take turns presenting their posters to each other
- ❖ For participants coming back on Day Two, this exercise will be good practice for the core of tomorrow’s work
- ❖ For participants *not* coming back 😞, they can use this exercise to encapsulate their idea for a badge project to take home

Day One Closing Remarks

- ◆ **Thanks for working so diligently** over the last four hours!
- ◆ We covered a lot of ground and **I appreciate your engagement and expertise.**
- ◆ It is our hope that you will **take the ideas sprouted here today and continue to development them** – either tomorrow here at the Summit or in your neck of the woods.
- ◆ **Please make your way back to the plenary area for today's closing remarks.**

Notes

Let's Do It Again

DAY TWO

Facilitation Agenda

Day Two (2 sessions, fewer participants)

Station 1: Concept Generation (AM ONLY)

- Creative Matrix
- NUF Test

Station 2: Concept Refinement

- Concept Poster Development
- Pre-Mortem
- The Blind Side

Station 3: Pledge Center (PM ONLY)

- Commitment Form Development

Ideation

Creative Matrix

	More Issues	More Earners	More Endorsers/ Accepters
Tech Tools			
Messaging			
Research			
Policy			
Wildcard			

- **Objective:** generate a wide swath of ideas in a short period of time and encourage the cross-pollination of ideas
- Each cell represents the intersection of two categories and a potential area where a project can be developed
- The first column represents *tools* that enable innovation. Across the top, you will see a familiar set of three categories.
- Encourage project teams to identify as many project ideas as possible!

Prioritization

NUF Test

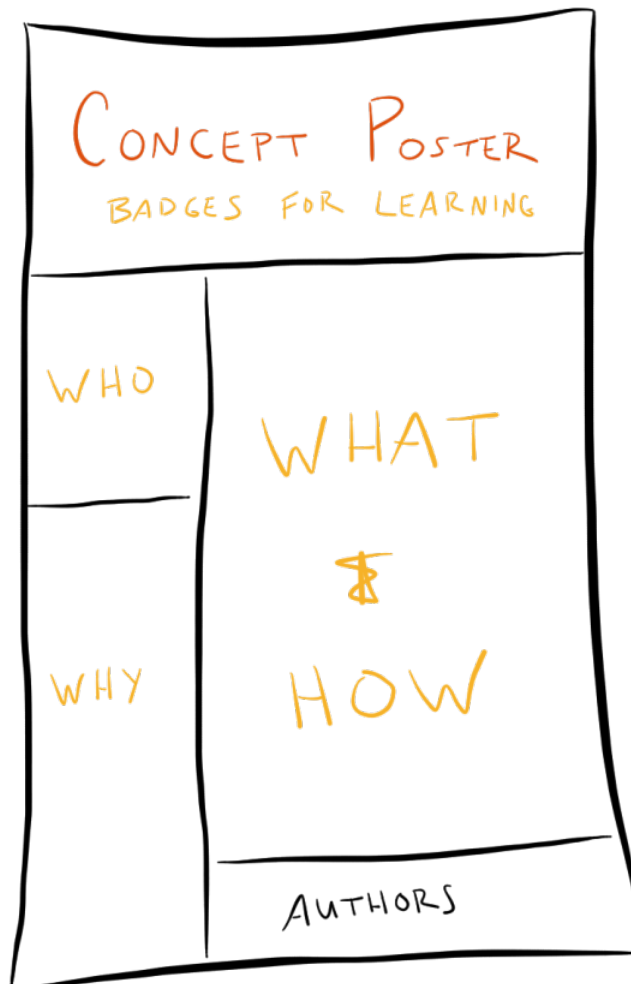
	NEW	USEFUL	feasible
New school policy	7	2	6 = 15
Insert great idea here	0	3	10 = 13
Something interesting	0	6	8 = 14
Badge Bingo Night	8	9	5 = 22
Open Badge Trainings	10	4	1 = 15

-  **Objective:** do a quick “reality check” on proposed ideas.
-  In the NUF Test, participants rate an idea on three criteria: to what degree is it New, Useful, and Feasible?
-  **New:** Has the idea been tried before?
-  **Useful:** Does the idea actually solve the problem?
-  **Feasible:** Can it be done?
-  To play, the group rates each idea from 1 to 10 for each criterion and tallies the results
-  A group may choose to write down scores individually at first and then call out their results on each item and criterion to create the tally
-  Scoring should be done quickly, as in a “gut” check

Project Design

Concept Poster

DAY 2
Station 2



- Objective: get participants thinking about the major elements of a project plan: What, How, Who, Why, etc.
- This is the same exercise as Day 1, but with more focus and attention to the details
- The poster asks participants to consider and present information regarding **what** a project intends to do, **how** the participants think it can be done, **who** needs to be involved, and **why** the project should be undertaken
- Posters can be customized as needed. Other potential categories include: **Goals, Metrics, and Needs**

Risk Assessment

Pre-Mortem

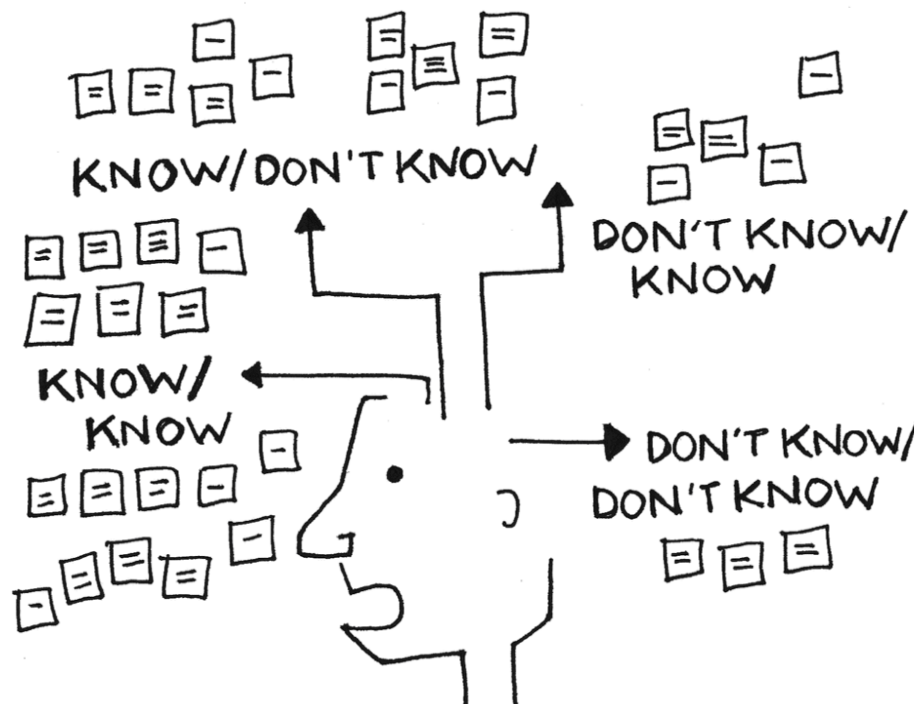
DAY 2
Station 2



- Objective: open a discussion at project inception about what *could* go wrong to address the risks for project failure as part of the planning process
- The exercise starts with a simple question: “What will go wrong?” though it may be elevated in phrasing to “How will this end in disaster?”
- Unlike a more formal risk analysis, the pre-mortem asks team members to directly tap into their experience and intuition, at a time when it is needed most, and is potentially the most useful
- A pre-mortem is best conducted with all key team members present and after preliminary goals and a plan have been laid out

Reality Check

The Blind Side



- 🟢 **Objective:** disclose and discover unknown information that can impact the success of a project or initiative
- 🟠 Help participants work their way clockwise:
- 🟠 Things they know they know (about the project) (e.g., “we are content experts”)
- 🟠 Things they know that they *don't know* (e.g., “we are not tech experts”)
- 🟠 Things they didn't know they knew (e.g., hidden talents and skills among the group)
- 🟠 Things they don't know they don't know (e.g., requires outside perspective; new, diverse partners)
- 🟢 Having a diverse group enhances the feedback loop for the Don't Know categories

Source: Gamestorming

Facilitation Training 36

Commitments & Pledges

DAY 2
Station 3

Commitment Form Development

Summit to Reconnect Learning

Commitment Form

Digital badges are a promising new way to reconnect learning to the demands and possibilities of our times. By recognizing skills and competencies wherever they are acquired, badges can illuminate unique and personalized pathways to job, career and civic success.

Commitments should be designed to be actionable, specific, and measurable...

TITLE: <INSERT DESCRIPTIVE & EXCITING TITLE>

COMMITMENT BY:

<INSERT NAME & INFO FOR ORG LEADING THIS COMMITMENT?>

PARTNER(S):

<INSERT NAMES OF PARTNER ORGANIZATIONS>

SUMMARY:

<INSERT SUMMARY OF YOUR PROJECT; UP TO 200 WORDS>

APPROACH:

<INSERT DETAILS ABOUT YOUR APPROACH, INCLUDING WHATS UNIQUE>

DESIRED OUTCOMES:

<INSERT SPECIFIC GOALS FOR THIS COMMITMENT AND HOW THEY WILL BE MEASURED>

BACKGROUND:

<INSERT BRIEF HISTORY OF THIS COMMITMENT>

NEEDS:

<INSERT HELP YOU ARE SEEKING TO MAKE THIS COMMITMENT HAPPEN>

POINT OF CONTACT:

<INSERT CONTACT INFO FOR MAIN POINT OF CONTACT>

- This station is a gold-standard of the Summit to Reconnect Learning
- The goal is that many people will make commitments before they leave the summit
- Forms will be submitted online using a template that will be provided
- Facilitators should encourage teams to work diligently to complete the form
- Feel free to ask group probing questions as they work through the questions and prompts
- By this point, participants should be discussing the more nuanced aspects of the project at hand and what their organization can offer

Help Desks

- ◆ **Ask the Experts in the Make Zone**
 - ◆ Badge visionaries – folks with deep knowledge about making badges happen successfully – will be available throughout Day Two to answer questions in their areas of expertise
- ◆ **Visit the Doodle Desk**
 - ◆ A graphic artist will be available on Day Two to help people illustrate their ideas, create icons and logos, and/or build a storyboard

Sources & Further Reading

Alphachimp Learning Systems: <http://www.alphachimp.com/>

The Interaction Method: <http://fog.ccsf.edu/jbiehn/documents/Interactionmethodofconductingmeetings.DOC>

Mozilla Open Badges: www.openbadges.org

Reconnect Learning: www.reconnectlearning.org

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Kumar, V. (2012). *101 Design Methods: A Structured Approach for Driving Innovation in Your Organization*. Wiley.

Luma Institute. (2012). *Innovating for People Handbook of Human-Centered Design Method*. LUMA Institute.

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