**www.pmadata.org/stlr**

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**We invite you to use and adapt PMA STLR tools!**

Whatever tool you discover and intend to try out, you will *need* to adapt these tools to your context.

This may include:

* ***Changing questionnaire question text*:** Some tools contain questions from our questionnaires ([*publicly available here*](https://www.pmadata.org/data/survey-methodology)), along with their numbering. Note that, in some cases, question numbering has changed across phases, but any questions cited in a tool use consistent numbering *within* that tool.
* ***Considering appropriate pronouns:***We use female pronouns quite often, as PMA worked with female enumerators – *and* as a bonus, we are happy to use a feminine pronoun by default for a change!

**TIP: *Use our hashtag system!***

As we used these tools across various country contexts, we developed a simple system of using hashtags as placeholders for information that will need to be updated based on the country, context, culture, and program.

For example, information in a tool that was country-specific is noted with the hashtag placeholder, *#countryspecific* – or possibly an even more specific placeholder like *#districtlevel* or *#localpartner*.

Information that required a change in date is noted with hashtags such as *#todaysdate* or #*lastyear*.

These hashtags allow those adapting the tool to use the Find&Replace function to quickly identify and update all instances of a hashtag within seconds.

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**Group Learners Check-in Guide**

This guide supports facilitators and supervisors in leading check-in sessions with self-directed learners. It offers considerations for leading a group check-in on learning progress for learners who are participating in self-directed & independent learning. It also contains tips for facilitating these check-ins in situations where the participants are external partners or collaborators and not colleagues who work together regularly.

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*When adopting, adapting, and sharing this tool, please use this suggested citation:*

“Group Learners Check-in Guide”, created by Sarah Nehrling, for PMA (Performance Monitoring for Action). Released June 2024. CC BY-NC 4.0.

*When adopting, adapting, and sharing this tool, please use this suggested citation:*

“Facilitator’s Card”, created by Sarah Nehrling, for PMA (Performance Monitoring for Action). Released February 2024.

**Quarterly Group Check-Ins Conversation Guide**

*A guide for TKX advisors to lead quarterly check-ins with GROUPS of partner learners*

**IN PREPARING FOR THE GROUP CHECK-IN:**

**A reminder for the facilitator**

# ***The core tenets of Technical Knowledge eXchange (TKX):***

1. **Accent on LEARNER driving THEIR OWN learning**, and on TKX goal to provide support for this learner-driven learning in terms of content (materials, learning resources, trainings) and process (Individualized Development Education Plan (IDEP), these check-ins, Learning Pathways, other resources, etc.)
2. **Focus on learning integrated with doing**,
   1. Not a series of week-long workshops
   2. Instead, mostly bite-sized learning opportunities that can be done as a part of ongoing work or in parallel with adequate resources made available

# ***Objectives of the TKX Quarterly Check-ins:***

TKX advisors will facilitate quarterly check-ins with partner learners participating in TKX. These check-ins are opportunities for learners to:

* **Reflect** on and **celebrate** progress made in the past quarter
* **Set** and **readjust** learning goals (both in their IDEP and in general)
* **Identify** learning resources and opportunities (within and outside of TKX structures)
* **Suggest improvements** to the overall TKX process.

They are *not* intended to be measurable assessments or performance reviews. Call facilitators are *not* acting as accountability partners, but rather helping provide space for reflection and planning.

**Preparing to Facilitate the Group Check-In**

1. Remind yourself about the learners and their goals
   * *Individual*: Review the IDEPs of a few learners who have confirmed attendance at this call; be ready to open other IDEPs of call participants during the call, when relevant or helpful
   * *Team and global:* Review the documentation of priorities for different partners and teams
2. Refresh your memory about organizational priorities and resources
   * Review the organizational Learning Pathways and other learning documents to refresh your memory about high-priority goals
   * Review your organization’s learning resources & documents, what they are and where they are kept to refresh your memory about available resources that might provide content or process support to learners
3. Read this Conversation Guide to give you ideas about how to prepare for and facilitate this conversation; familiarize yourself with the “additional prompts” questions so you may use them as useful

**FACILITATING THE GROUP CHECK-IN CONVERSATION:**

**The Nuances of a GROUP Check-In**

In a **group** check-in conversation, there are some important aspects that may differ from the one-on-one check-ins, including:

* **Active but light-touch facilitation**: A need to facilitate in a way that invites participating learners to share talk time, to avoid one or two voices dominating, while also limiting your own talk time
* **Less and broader content**: An expectation of covering fewer topics and going into less detail than would be possible in one-on-one calls
* **Learning across countries & between partners**: A focus on creating and boosting opportunities during the call for partner-partner exchanges and future partner-partner learning prospects, about both the process of learning and the content being learned
* **Less predictability, need for more flexibility**: We will not know who will participate in the check-in before the call starts. This means that we cannot plan specifically for the number of learners and the composition of the group (*all from one technical area? all experienced with PMA, with TKX? All verbal processors or quieter? etc.*). We will have to be more flexible in the moment by, for example:
  + Giving more prompts if participating learners are less verbal
  + Discussing data management-specific skills if there are only data managers on the call
  + Reviewing some TKX concepts and tools (self-directed learning, IDEPs, etc.) if participating learners are less familiar with TKX
  + \*\*\* Rescheduling check-in calls if there are simply too many learners to have a meaningful conversation; *this situation and how to handle it will be left to the discretion of the facilitators*
  + \*\*\* Using breakout rooms to discuss data manager-specific and survey operation-specific skills, if there are many learners and a desire for this level of specificity; *we suggest using a platform such as Zoom, to ensure the technical ability for breakout rooms*

**The difference between Group Check-Ins and Group Learner calls**

There will be some overlap between Group Learner Calls and this Quarterly Group Check-In, and the facilitator’s role remains the same in both: to provide space for reflection and planning.

However, we see two big differences:

1. **Structure**: The check-in is a structured call, focused on looking at each learner’s learning progress made (and on what and why/how) and on the learning they might target for the next quarter. Because of this structure, there *may* be more talk about technical details, if there is space in the conversation. The group learner calls have a very loose structure, in order to be reactive to needs and interests in the moment by the participants, and so may focus on anything related to learning. The mix of process talk and technical talk will be determined almost entirely by the topics raised by learners and the themes that the call takes on in turn.
2. **Objectives**: As mentioned above, the check-in call aims to support learners in reflection, celebration, setting and adjusting goals, and identifying resources and opportunities. Group learner calls aim to provide a space to connect, support, and motivate learners. (Both calls allow for learners to suggest TKX improvements.)

# **Suggested Conversational Steps & Questions**

* 1. **BACKGROUND: Remind the learners about two key tenets of TKX (above)**
  2. **OBJECTIVES AROUND PROCESS AND CONTENT: Share objectives for this session, and remind about most relevant documents for this discussion** 
     + **Objective 1 (Process)**: Gain clarity around what is working and what is not, in terms of **how** learners are learning and making progress toward IDEP and other learning goals during this quarter, and in what ways the TKX initiative (*structure, tools, roles, timing, etc.*) are more or less supportive
     + **Objective 2 (Content)**: Review and begin to plan for determining or modifying *what* to learn in this upcoming quarter, and the opportunities and resources to learn that X skill.
  3. **SHARING STORIES: Ask 1 or 2 volunteers (or 1-2 learners who were pre-selected and prepared by the facilitator) to share “in 3 minutes or less” a short story about their learning,** describing a time during this past quarter when their learning was exceptional, either positively or negatively. After each story, ask the learner to briefly respond to a few prompts you provide:
     + *Why* it was exceptional
     + The different things that went into making it happen (*e.g. time, focus, organization of learning, opportunity to practice, external support, etc.*)
     + The different things that resulted *(e.g. learned a lot, accomplished new task with new skill, given additional responsibility, better/higher-quality/more functional/more efficient product, etc.).*
     + Which of these elements are replicable, and how and by whom, to help them to learn better (*or more or faster or more efficiently or different skills*)

Alternatively, you could discuss their "performance" instead of their learning, and then back-track to the learning.

*Moderation:* Note that, as a facilitator, you will have to moderate this sharing. Be clear with the storyteller about the time limit, ask fewer prompts if there is less time, gently interrupt tangents (when appropriate), etc.

* 1. **INTRODUCTION OF KEY QUESTIONS: Introduce the key questions that will guide this conversation (which were also shared in the email invite to these check-ins). Read these questions, and then begin the discussion by rereading the first question and inviting responses.**
* **Progress**: What are you learning? What progress have you made?

*Additional prompts as useful*:

* + Can you think of an example where you’ve made exceptional progress this quarter? Why do you think that happened?
  + Where have you received praise, in terms of your IDEP skills or other targeted learning skills? What makes this praiseworthy (important, valuable)?
    - *If stuck, you can suggest that the learner identifies a time where they praised themselves for progress or an accomplishment.*
  + Even if you didn’t make progress on the goals in your IDEP, what other skills have you learned or made progress on this past quarter?
  + How do your IDEP/personal learning goals align with team-level goals? Are there any team-level goals that you want to include in your IDEP?
  + In what task(s) have you gained in comfort, efficiency, effectiveness, and/or accuracy?
  + What is helping your learning?
    - How has TKX supported this progress? How might TKX better support this progress?
    - How have the colleagues on your team and other global colleagues supported this progress? Are there additional opportunities for them to further support you?
  + What might you have learned that you can help others learn?
* **Challenges**: What aren’t you learning? What is hindering that learning?

*Additional prompts as useful*:

* + Can you think of an example where you’ve made an effort but did *not* make progress this quarter? Why do you think that happened?
  + Where have you received feedback about areas in need of improvement? What did you do after having received that feedback?
  + In what task(s) do you feel the most uncomfortable, inefficient, ineffective, and/or inaccurate?
  + Where do you still need to grow into your current role and responsibilities?
  + Where are there gaps between you and your role/responsibilities that you think cannot be reasonably filled?

*\*\*\* This question is meant to get at unnoticed gaps between their role/responsibilities and their learning goals, or potentially unsurmountable gaps between the responsibilities put on them and the reasonable time and resources needed to meet them.*

* + Is there another learner who might support you in this learning?
* **Individual AND team-level learning**
  + About team-level learning and individual learning efforts
    - Team-level: recap of developments of the team
    - Individual level: is there anything that one of your colleagues is learning that you may want to learn, or that hearing about has sparked interest?
* **Changes**: Is there anything you want to change for next quarter in terms of *what* you learn and/or *how* you learn? (*e.g. target different skills, focus on different parts of targeted skills, additional resources or learning methods, more or less use of TKX process tools, etc.*)

*Additional prompts as useful:*

* + Do you want to/is there a way to integrate/combine your self-directed learning goals and your team’s priorities?
  + Do you need more guidance on how to be effective at self-driven learning?
  + Would you benefit from more or a different kind of resources for a certain goal, or is it time to shift to a new IDEP goals entirely?
  + What skill might you share with others in PMA, through a resource you create or identify and then share in your organization’s learning resources & documents folder/page/repository, a hosted call where you explain the skill or provide a live tutorial, or other means?
  1. **TAKEAWAY AND NEXT STEPS: Recap the conversation’s takeaways and discuss next steps**

Questions for takeaway

* + - * **Main takeaway**: What did you learn from this call about your own learning this past quarter? About others’ learning?
      * **Process**: What is one idea about *how* to learn that you found particularly helpful and will try out next quarter?
      * **Content**: What is one idea about *what* to learn that you found particularly relevant and will try out next quarter?

Points of info for next steps:

* + - **Ways to continue this conversation, particularly if learner is interested in a more in-depth discussion of his/her technical learning goals**:
    - Email your TKX Advisor
    - Reach out on the Slack Collaborative Learning channel to engage with other learners.
    - **IDEP**: Encourage to update IDEP if helpful, as a way to think through what exactly the learner wants to focus on, how others might support that, what resources exist, and what the first step in that learning might be
    - **Partner team support**: Encourage, where helpful, a conversation between the learner and their principal investigator (PI)/supervisor about additional support for technical learning and/or application of what is being learned
    - **Resources**: Reminder of content and process tools available to support your learning, notably:
* Internal resources for your organization
* Standard operating procedures that contain detailed information on processes they may be interested in learning
* Google/YouTube search for additional resources for X skill
* **Feedback**: Reminder to complete and submit the Learner Reflection & Feedback Form
* Purpose is to (1) help learners reflect on their learning in the past quarter, and (2) contribute to the TKX M&E learning system
* Completing the form is voluntary, and any identifying information from responses will be anonymized before being used for M&E purposes

**AFTER THE GROUP CHECK-IN CONVERSATION:**

**6) DOCUMENTING THE CHECK-IN CONVERSATION: After completing the check-in, TKX advisors should:**

* + Save email exchanges/call notes

Note the status of check-in for each learner in the TKX Learners sheet, marking as having “attended Group Call [date]”

**7) ADVISORS’ RECAP AND ACTION:** After all expected check-ins are completed for the quarter, the next bi-monthly TKX advisors’ meeting will be dedicated to a structured reflection on how the check-ins went and the common requests for support, in order to:

* + Get advisors’ feedback on the overall process, notably on this new group check-in structure
  + Identify a commonly targeted skill or request for support for which the team supporting learners can feasibly create a new tool (or other concrete response to this need)

We will also engage in a “process review” of the group check-in pilot. For example:

* In what ways did the group check-in process help us progress toward our goals?
* In what ways did the group check-in process *hinder* us from progressing toward our goals?