

Malawi Stocktaking Agenda

Dates: March 6 - 9 (Break-Day March 8)

Overall Objectives:

- Assess progress made thus far in the CDCS
- Reach renewed agreement on approach (as outlined in Theory of Change and 3C approach)
- Prepare for next CDCS

Day 1: Monday, March 6 (8:00 a.m. - 3:00 p.m.)

Overall Objective for Day: Establish State of CDCS

Morning

Participants: All Mission Staff (am), Implementing Partners, PCVs,
Objective: Establish State of CDCS / Are We Making Progress?

Key:

Plenary Times are Highlights in Yellow
Sector-Specific "Large Group" Times are in Dark(er) Blue
Sector-Specific "Smaller Groups" are in Light(er) Blue
Cross-Sector Small Groups are in Pink
Coffee and Lunch Times are in Grey

Afternoon

Participants (break-out groups): Technical Staff (EXO, some FMO might choose to leave after morning coffee break)
Objective: Explore the state of progress, noting what is going well/what needs improvement and why.

Time	Session Name	Session Goals/Outcome(s)	<u>Inputs Required</u> during or before	Facilitator/Preslenter and Notes/Action Items	Methodology
7:30 (45 min)	Coffee				
8:15 (10 min)	Welcome and Agenda Overview	Set Stage: <ul style="list-style-type: none"> • Review logistics, purpose, overall agenda, and flow • Establish participants' involvement as a critical input 	N/A	Amy (?) <ul style="list-style-type: none"> • Allow buffer time for folks to arrive? • Clarify bathrooms, coffee (at will), lunches 	Presentation (mission-wide plenary)
8:25 (20 min)	Opening Remarks and Vision from Mission Director	Set Stage: <ul style="list-style-type: none"> • Establish management vision for retreat • Acknowledge IPs in retreat 	MD Talking Points	Lit Tazewell	Presentation (mission-wide plenary)

<p>8:45 (15 min)</p>	<p>Why are We Doing This? We are Part of Something Critical</p>	<p>Set Stage:</p> <ul style="list-style-type: none"> Restate purpose of the mid-term CDCS review (including new ADS requirement) Establish parameters - what this process is and not Inspire and build buy-in/set tone for week 		<p>TDY facilitation team (David/Angelina)</p>	<p>Remarks and reflection (mission-wide plenary)</p> <p>TDY team remarks (5 min - some of below may be in MD comments):</p> <ul style="list-style-type: none"> Point to purpose of learning and adaptive management Highlight and applaud partner presence Establish parameters for week - what we are and are not going to achieve and where we are in the process <p>Reflection exercise (10 min):</p> <ul style="list-style-type: none"> Conduct reflection exercise at individual tables: <ul style="list-style-type: none"> Ask individuals to reflect on one key contribution they have made to help the Mission achieve its strategic goal Ask individuals to share with their tables Ask tables to identify two or three highlights Open it up to plenary to have various tables volunteer to share Introduce 5-4-3-2-1: 1-page note sheet
<p>9:00 (90 min)</p>	<p>Where Are We? Overview of CDCS/PMP and Sector Performance</p>	<p>Establish Status of Achievement:</p> <ul style="list-style-type: none"> Do a quick summary and review of development hypothesis (including 3C) Establish progress made against Goal and highest-level targets Reach agreement on whether there is a problem (with outcomes or sustainability) 	<ul style="list-style-type: none"> PMP Status SI Quant Report SI Qual Report Handouts (PPTs, or Summary Docs) 	<p>Brian Frantz</p> <p>Action Item: Angelina to finalize hand out.</p>	<p>Presentation (70 min; mission-wide plenary)</p> <p>Format: Brian to present; David and Angelina will use time cards</p> <p>Parameters: Highlight what doing well and present results/data, incorporate storytelling piece, steer clear of recommendations - focus is on presenting data and ensuring everyone working from the same information</p> <ul style="list-style-type: none"> Brian: Introduction (including purpose and overall flow), CDCS RF overview, 3Cs; PMP construction and change over time, explain thoughts card (5 min) DO 1: Health and relevant cross-cutting sub-IRs (Nutrition, HIV, MCH) (10 min) DO 2: Sust. Livelihoods and relevant CC sub-IRs (8 min) DO 1: Education and relevant cross-cutting sub-IRs (7 min) DO 3: Gov (5 min) Q&A (5 min) David/Angelina: Quick stretch break (2 min) and Reflection and Implications(?) using "5-4-3-2-1 Handout" (5 min of individual reflection) Social Impact reports (15 min) David/Angelina: Plenary soliciting general thoughts/observations (with neighbor, with table (time permitting) and a few ideas shared with large group) (10 min) <p>Reflections and Implications (15 min; sector-wide plenary)</p> <ul style="list-style-type: none"> Have individuals reflect regarding the below on paper/stickies and report out to their tables <ul style="list-style-type: none"> 5 ideas/outputs from the mission-wide session that were most relevant to your sector 4 things in the current CDCS that are working well for your sector 3 of the most meaningful contributions that integrated programming/cross-cutting are making

					<ul style="list-style-type: none"> o 2 challenges with the current CDCS for your sector o 1 item that didn't know (per sector) • Ask a few tables to share their reflections • David/Angelina: Closing and next steps with instructions on where to go following break (5 min) • Q&A Buffer (used throughout 10 min)
10:30 (15 min)	Coffee Break				
10:45 (30 min)	Break-Out Session, by Sector: Theory of Change (TOC) Review and Stocktaking	<ul style="list-style-type: none"> • Review TOCs at the sector level • Understand current status and risks and assumptions associated with TOCs • Identify and prioritize top issues for sector to delve into on Day 2 	<ul style="list-style-type: none"> • Facilitator's Guides • Action Item: Small-group distribution / assignments • TBD materials associated with activities (see Methodology) 	<p>Facilitators: Health - Amy / Brian Education - Angelina Sustainable Livelihoods - David / Ryan Governance - Richard /</p> <p><u>Groups Numbers</u> Health: 8 groups Education: 3 groups Sust Livelihoods: 6 groups Governance: 3 groups</p>	<p>Reflections and Facilitated Discussion (sector-wide plenary and small groups) Overview of Sector Workshops (10 min; sector-wide plenary)</p> <ul style="list-style-type: none"> • Facilitators provide overview of this session and how it fits into week: <ul style="list-style-type: none"> o Conduct TOC review and current status; identify and prioritize issues by sector (this session and afternoon of Day 1) o Revisit Day 1 and issues following TedTalks; brainstorm solutions and action items for sectors to present to Mission (Day 2) o Work on sector presentations (as needed on Day 3) o Present sector recommendations and prioritize as a Mission (Day 4) • Answer any questions or concerns participants might have <p>TOC Review (20 min; sector-wide plenary) Purpose: Ensure that all present within technical break-out group are familiar with the PAD-level TOC</p> <ul style="list-style-type: none"> • Facilitators present TOC for DO/sector and ask the below questions to get juices flowing: <ul style="list-style-type: none"> o Based on the data from this AM and your own observations, does it still hold true? o If not, how has our TOC changed as we implement?
11:15 (105 min)	Break-Out Session Theory of Change (TOC) Review and Stocktaking	<ul style="list-style-type: none"> • Review TOCs at the sector level • Understand current status and risks and assumptions associated with TOCs • Identify and prioritize top issues for sector to delve into on Day 2 	<ul style="list-style-type: none"> • Facilitator's Guides • Small-group distribution / assignments • TBD materials associated with activities (see Methodology) 	One facilitator per small group	<p>Stocktaking (60 min cont into afternoon; sector small groups) Purpose: Identifying what is going well and where we are having challenges. And clarifying why (towards identifying top issues).</p>
12:30 (60 min)	Lunch				

1:30 (80 min)	Break-Out Session, by Sector: TOC Review and Matrix Exercise (cont)	See above		One facilitator per small group	TOC Matrix Activity (cont) Stocktaking cont (30 min) <ul style="list-style-type: none"> Have small groups continue discussion from morning and document top issues on flip chart
2:00 (50 min)	Prioritization and Voting Pulse Taking / Closing	<ul style="list-style-type: none"> Get rapid feedback before closing for day Get sense for major issues to address for next day 	Feedback form or blank post-it notes		Prioritization and dot voting (50 min) <ul style="list-style-type: none"> Have groups put issues up on wall (one flip chart page) for other small groups within sector to review Conduct dot voting exercise to identify top three-to-five issues to unpack in Day 2 Facilitators will consolidate top issues after hours in handout for Day 2 Feedback gathering through forms or post-it notes
3:00	Departure at will				

Day 2: Ground Truthing our Progress

Overall Objective for Day: Consider how external factors have impacted implementation

<p><u>Morning</u></p> <p>Participants: All Mission Staff (am), Implementing Partners, PCVs, Embassy staff Objective: Expose staff to new information to further question assumptions and external risks</p>	<p><u>Afternoon</u></p> <p>Participants (break-out groups): Technical Staff (EXO, some FMO might choose to leave after morning coffee break) Objective: Finalize updates to approach (theory of change) and prepare for presentation to management</p>
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Time	Session Name	Session Goals/Outcome(s)	Inputs Required (during or before)	Facilitator/Presenter and Notes/Action Items	Methodology
7:30 (30 min)	Coffee				
8:00 (30 min)	Recap/Team Building	<ul style="list-style-type: none"> Ground staff in process Overview Purpose and Day's Schedule PO: Summarize highest level issues of sector-specific work 		Angelina	TBD
8:30 (80 min)	USAID TED Talks	<ul style="list-style-type: none"> Challenge internal thinking vis-a-vis TOC and issues identified in Day 1 Question assumptions before moving on to next steps Energizer (as appropriate) 	Presenter participation in recap of de facto strategy (? Validation style)	David/Angelina to moderate	<p>Activity Overview (2 min): David/Angelina to kick-off TED Talks - provide overview of flow and format and our role as moderators.</p> <p>Overall Flow and Format (see Small Group Facilitator's Guide for Detail):</p> <ol style="list-style-type: none"> TED Talk (short, sweet, high-impact) (20 min) Post-Talk / Quick Work/Feedback: First Impressions (10 min) - Handout: "I like...; I wish...; I wonder..." for participants to fill out Q&A Time: Try to keep these on target, related to CDCS and discussions (10 min) Repeat <p>TED Talks (80 min):</p> <ul style="list-style-type: none"> Economic: Richard Record, World Bank (8:30-9:10) Political: Dr. Blessings Chinsinga, Chancellor College (9:10-9:50)

9:50 (20 min)	Coffee				
10:10 (120 min)	USAID/TED Talks (cont)	See above	See above		TED Talks (120 min): <ul style="list-style-type: none"> • Climate Change: Dr. James Chimphamba, Chancellor College 10:10-10:50) • Population: Dr.Eliya Zulu, AFRIDEP (10:50-11:30) • U.S. Foreign Policy: Ambassador Palmer (11:30-12:10)
12:10 (5 min)	Submit "Vote" on Other "Missing Issues				
12:10/5 (60 min)	Lunch				
1:10/5 (15/20 minutes)	Break-Out Session, by Sector: Brainstorming and Action Planning	<ul style="list-style-type: none"> • Revisit issues identified on Day 1 from a new perspective • Conduct brainstorming and action planning to inform mission-wide presentations on Day 4 	Output: i. Sector-Specific Summaries of Issues ii. Inputs for the Sector-Specific presenter	One facilitator per small group	Reflections and Facilitated Discussion (sector-wide plenary and small groups) TED Talk Reflection (20 min; sector-wide plenary) <ul style="list-style-type: none"> • Ask sector how TED Talks may or may not have changed their thinking about the issues they identified (revalidates top-level issues or changes accordingly) • Document any key points on flip charts to address accordingly (whether within an existing issues or in creating a new issue) Overview of Process (10 min) <ul style="list-style-type: none"> • Divide up into thematic groups • Select one reporter per small group • Reach agreement that that team can meet to finalize presentations for Thursday AM
1:30 (90 minutes)	Break-Out Session, by Sector: Brainstorming and Action Planning	<ul style="list-style-type: none"> • Revisit issues identified on Day 1 from a new perspective • Conduct brainstorming and action planning to inform mission-wide presentations on Day 4 	Output: i. Sector-Specific Summaries of Issues ii. Inputs for the Sector-Specific presenter	One facilitator per small group	Brainstorming and Action Planning (90 min; small groups then sector-wide plenary) <ul style="list-style-type: none"> • Sectors have prioritized issues from Monday (handouts put together by facilitators from Day 1 and/or whiteboard/wall space) and revalidated these following the TED Talks • Break sectors down into three groups - each group brainstorms around one issue and suggested next steps (60 min) <ul style="list-style-type: none"> ○ Collectively brainstorm recommendations and initial action items for this issue by answering the following questions: <ul style="list-style-type: none"> ■ What small changes can be made over the next 18 months in regards to this issue that might result in quick wins and/or can set us up for success in the next generation CDCS ? (short-term to medium-term) ■ What recommendations do you have in regards to this issue for the next generation CDCS? (long-term)

					<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ■ What do we need to know and that we don't know now that we can learn over the next 18 months - PEA, scenario planning, special research study, etc.? ○ Chart recommendations on a flip chart with a line down the middle separating short-to-medium term from long-term ○ Review the recommendations by thinking through a feasibility lens. Which are the most feasible considering resources and level of effort to level of impact? Groups should prioritize 2-3 recommendations based on this. Questions to consider: <ul style="list-style-type: none"> ■ Technical <ul style="list-style-type: none"> ● Do we have the technical capacity? ● Does it hold technical merit? ■ Economic <ul style="list-style-type: none"> ● Do we have the resources? ● Does the funding match? ■ Organizational <ul style="list-style-type: none"> ● Does our organizational structure support it? ● Is there political will? ○ Finalize recommendations on one flip chart page based on above and select someone to present out to the sector ● Reconvene all small groups into sector-wide plenary for presentations and dot-voting (30 min) <ul style="list-style-type: none"> ○ A presenter from each group reports back to the room and provides top recommendations with rationale ○ All participants receive three dots to vote on their top three priority recommendations for the Office. ○ Participants walk up the flip charts and cast their vote ○ Facilitators summarize and share next steps with group (putting together presentation for mission-wide session on Thursday)
3:00 pm	Departure, at will		-		

Day 3: Rest Day (In the Office)

No planned activities.

Day 4: Operational Considerations and Action Planning: Short-, Medium-, and Long-Term Steps

Overall Objective for Day: Move towards adapted implementation and planning for the next CDCS

Time	Session Name and General Approach Description	Session Outcome(s)	Participants (Facilitators Needs)	Methodology
7:30 (30 min)	Coffee			
8:00 am (130 min)	Sector-Summary Presentations and Discussion	<ul style="list-style-type: none"> Reach agreement on next steps within each sector 	Ryan to moderate David/Angelina Support <ul style="list-style-type: none"> Idea notepads // for engaging folks in next process/step 	Facilitator Opening (5 min) Sector presentations (50 min - 25 min each with presentation (7 min) and Q&A)/Discussion (18 min)): <ul style="list-style-type: none"> Education (25 min) Health (25 min) Eyeopener / Energizer (15 min) (Or Coffee Break #1) Sector presentations cont (50 min) <ul style="list-style-type: none"> Sustainable Livelihoods (25 min) Democracy, Rights and Governance (25 min) Mission Director Closing and Thanks (15 min)
10:15 am (15 min)	Identification of Remaining Opportunities and Issues (Operational/Non-Technical and Cross-Sectoral)	<ul style="list-style-type: none"> Identify "other" topics that need attention in short-, medium-, and long-term 	David/Angelina to moderate	Conclusion and Identification of Cross-Cutting, Operational, Management, and Other Issues (10 min) <ul style="list-style-type: none"> Facilitators Ask: What is still missing from recommendations and actions in short/medium/long-term from an operational or non-technical standpoint to support strong programming? Participants write ideas on post-it notes before break Participants place post-its onto walls prior to departing for coffee
10:30 am (30 min)	Coffee Break			Organizing / Prioritizing <ul style="list-style-type: none"> During break, facilitators categorize the issues into groups Facilitator's write-up group names and identify break-out rooms (perhaps provide a print-out with the locations of break-out rooms // dividing groups up in rooms around operational, management, integration issues) Individual post-it notes are compiled and prepared for the facilitator of the small group
11:00	PLENARY: Next Steps and Process for Break-Out Sessions	<ul style="list-style-type: none"> Instructions Self-selection / Divide up (to Adjust group sizes 	Group size - ~80 (while IPs are gone; other staff members from Mission are present)	Small-Group Work Around Cross-Cutting Issues <ul style="list-style-type: none"> Facilitator's explain top issues/groups and ask participants to self-select to participate in a group (based on their interest) Ideally facilitator's work to determine that groups aren't too big.

		(?) <ul style="list-style-type: none"> • Move to Break-out rooms 		
11:20 (40 min)	Cross-Cutting Small Group Work	<ul style="list-style-type: none"> • Describe problem in break-out groups 		Small Group Work: All Staff <ul style="list-style-type: none"> • Small group facilitator's provide post-it notes for topic/theme to group. • Guiding questions: <ul style="list-style-type: none"> ○ What is the current state (including opportunity or risk, if relevant)? ○ What are the core issues / problems (or opportunities)? ○ What concrete actions can address these? (all ideas should be noted)
12:00 (60 min)	Lunch (Instructions are to take lunch at will)			
1:00 pm (60 min)	Cross-Cutting Small Group Work (contd)	<ul style="list-style-type: none"> • Finalize recommendations / solutions • Feasibility (time permitting) • Finish paper survey • Close with next steps (each facilitators) 		Some groups may continue or choose another topic.
2:00 pm	Structured Peer Review / Knowledge Cafe (30 min)	<ul style="list-style-type: none"> • Feasibility Consideration 		
2:00 pm	End of Workshop Celebration Tea / Coffee on Balcony (Perhaps Outside in Lunch Space?)			Review, summary, closing led by external facilitators (30 min) <ul style="list-style-type: none"> • Summarize results and reconfirm with mission that these are the right things to focus on • Ask staff if they have any final concerns/comments • Ask people to reflect individually on the below and share with their neighbors <ul style="list-style-type: none"> ○ I learned ... ○ I will ... • Cover any final acknowledgments, next steps, etc. and ask staff to complete evaluation form
3:00	Departure			

Day 5: What Can/Should We Do? Operationalize the Long Term and Strengthening our Team

(Perhaps a different week; Pro – more prep time; Con – may not feed directly into de facto/de facto and learning agenda strategy discussion)

Time	Session Name	Session Outcome(s)	Overall Objective	Inputs Required (during or before)	Participants (Facilitators Needs)	Methodology
8:00	Summarizing and Reaching Agreement (if needed)	Agreement / Validation of Finalized Workplan (Confirmation of commitments and agreements.)	Now-What? Next steps for CDCS update and redesign.	— Action plan, noting Key commitments from prior day; Key areas for clarification	USAID Program Office and Management Staff Only (?) <i>No external actors</i>	Session for Read-out, feedback (and adjustment, as needed)

Overall Approach Notes:

- Maximize internal prep (including PDA-led and Tech-team led), consider use of external actors for rapid document reviews
- External Feedback and Support is critical to success (as the major input to getting a quality product will be the facilitators/how and knowledge management – during and post discussions)
- Internal and external facilitation/leadership team
- Open agenda aimed at allowing DO teams to adapt their approach, as needed. Coffee/tea times are “at will” and room set-up should allow for seamless transitions from large group and small group, and back.
- Open v. pre-defined agenda (There are pros and cons, it would be excellent to have some flexibility and outside expertise to adapt, as appropriate)
- Pre-Assigned small groups

Workshop Management Approach - Lenses:

- Sustainability (via local actors)
- Risks (e.g. climate change, stability, humanitarian crisis)
- Management
- Multi-disciplinary approaches (to complex problems) / aka integrated programming
- Cross-cutting sub-IRs
- Knowledge management strategy
- Real-time notetaking Break-out groups: 1-2 notetakers per tech sector_____
- Summative visualization approach (read-out/visual summary production) Plenary wide: ??? DOC Team (?)
- Perhaps a Thursday (Day 1) and Monday (Day 2) approach would allow for an intense, but paced approach to the first set of discussions

Participants:

- Implementing partners (at key moments)
- Other donors (at key moments)
- GoM (?) on MGDS