

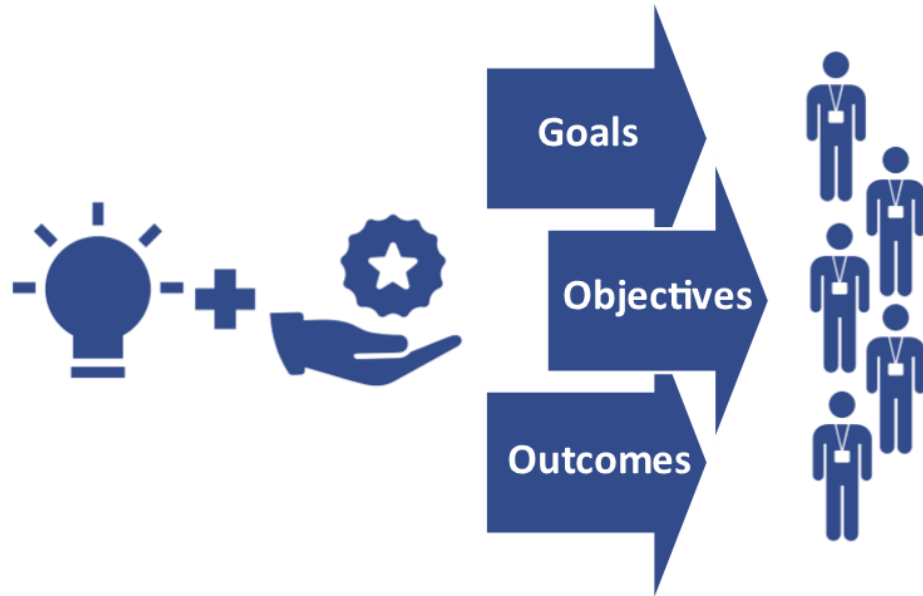


education**first**

Strategic Convenings

Education First's Approach to Strategic Convenings

Strategic Convenings At-A-Glance: What makes an Education First Strategic Convening?



We take your idea, add our content knowledge and expertise, and develop the convening's goals, objectives and outcomes to create a meaningful convening that achieves your vision.



Following Education First's Jobs to be Done model, convenings fall under the "Learning and Network Accelerator" category: "Facilitate, through product or process, the rapid sharing of perspective,

knowledge and experience within or across individuals, peer orgs or systems to build capacity and to help get more bang for the buck on invested resources.”

We bring expertise at all levels of convening creation and execution: Experience as practitioners and in the field, therefore informing the goals, objectives and agenda; experience as facilitators, ensuring that we harness the potential of all participants in the room; and experience with convening logistics, anticipating needs so that the client, convening participants, and facilitators can fully focus on collaboration. We also keep the big picture in mind: How does this convening fit within an overall strategy and the rhythm of the work?

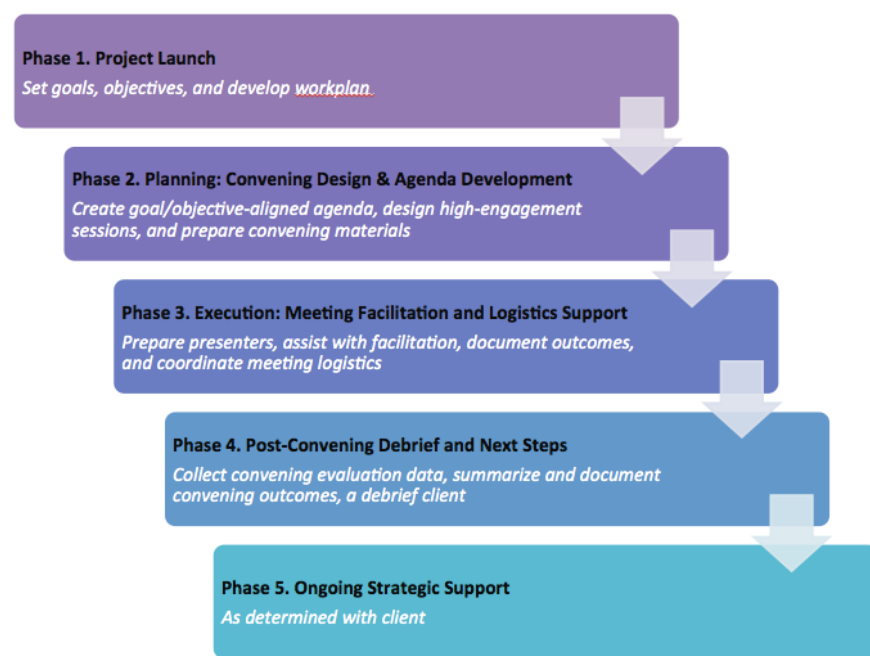
Strategic Convenings with Education First follow basic guidelines to ensure quality delivery.

- We work with the client to develop goals, objectives and preferred outcomes, and deliver on those markers through the development and execution of the convening.
- We apply the latest research on adult learning to develop convenings that are engaging, relevant and with actionable collaboration after the event has concluded.
- We are co-creators, applying the lens of the client’s goals and objectives to all aspects of the convening. A social and emotional learning (SEL) convening, for example, may emulate what adult SEL can look like in practice. Likewise, a convening on learning differences should offer multiple ways for participants to access materials and content.

Strategic Convenings in Five Phases

This Toolkit is organized around five phases of support, outlined in the graphic below:

1. Phase 1: Project Launch
2. Phase 2: Planning
3. Phase 3: Execution
4. Phase 4: Post-Convening Debrief and Next Steps
5. Phase 5: Ongoing Strategic Support



Sample Strategic Convening Scope and Timeline

Project Phase	Education First Activities	Deliverables
Phase 1: Project Launch <i>Month 1</i>	<ul style="list-style-type: none"> ▪ Develop detailed work plan, timeline and deliverables ▪ Finalize and administer pre-convening survey to gather input to inform planning ▪ Prepare analysis of survey findings to inform convening planning 	<ul style="list-style-type: none"> ▪ Detailed project work plan, continually updated for each phase of the project ▪ Pre-convening survey ▪ Analysis of survey findings
Phase 2: Convening Planning - Content & Logistics <i>Months 2-4</i>	<ul style="list-style-type: none"> ▪ Conduct in-person kick-off planning meeting ▪ Facilitate up to 3 planning calls with client ▪ Refine meeting objectives based on client needs and input ▪ Develop and refine agenda with consideration of exemplary adult learning practices and engagement strategies including creating a meeting that exemplifies best practices for diverse learners ▪ Identify, invite and prepare speakers by conducting at least one call with each speaker to discuss objectives, approach and expectations for the meeting ▪ Develop convening materials including participant and detailed annotated agenda ▪ Develop and disseminate pre-work ▪ Determine format and content for post-convening summary memo ▪ Coordinate meeting logistics including securing (as needed) and arranging: <ul style="list-style-type: none"> ○ Hotel ○ Venue ○ Meals during the meeting and evening dining options ○ Transportation on site, as needed ○ Flights for participants 	<ul style="list-style-type: none"> ▪ Regular planning committee calls (up to 3) ▪ Speaker/presenter identification and orientation calls ▪ Convening workbook ▪ Annotated meeting agenda with session objectives, content and speakers ▪ Participant agenda ▪ Confirmed venue, accommodations and travel for meeting ▪ Timely and responsive support for convening participants in arranging logistics and reimbursements ▪ On-site support for registration and logistics
Phase 3: Convening Facilitation & On-Site Logistics Support	<ul style="list-style-type: none"> ▪ Create a facilitator guide ▪ Prepare facilitators for their role at the convening via facilitator prep calls and in-person facilitator prep meeting ▪ Assist with session facilitation at the convening 	<ul style="list-style-type: none"> ▪ List of facilitators/speakers, including brief bios and summary of experience (same as above) for use in convening materials ▪ Facilitator's guide for convening

Project Phase	Education First Activities	Deliverables
<i>Month 5</i>		<ul style="list-style-type: none"> ▪ Facilitator prep calls
<p>Phase 4: Consortium Meeting Debrief and Next Steps</p> <p><i>Month 6</i></p>	<ul style="list-style-type: none"> ▪ Develop convening evaluation survey for participants ▪ Analyze results of participant evaluation and document in a memo ▪ Develop convening findings report ▪ Conduct debrief call with client 	<ul style="list-style-type: none"> ▪ Convening debrief call with planning committee ▪ Convening evaluation form ▪ Internal post-convening memo with reflections on what participants did and learned and recommendations for how to continue to support participants going forward (2-3 page memo plus survey analysis) ▪ Project debrief call with client
<p>Strategic Post-Convening Support</p> <p><i>Ongoing</i></p>	<ul style="list-style-type: none"> ▪ Specific activities to be determined as needed 	<ul style="list-style-type: none"> ▪ Specific deliverables to be determined as needed for the work