



the metis way TOOLKIT

A practical guide to collectively reimagining education

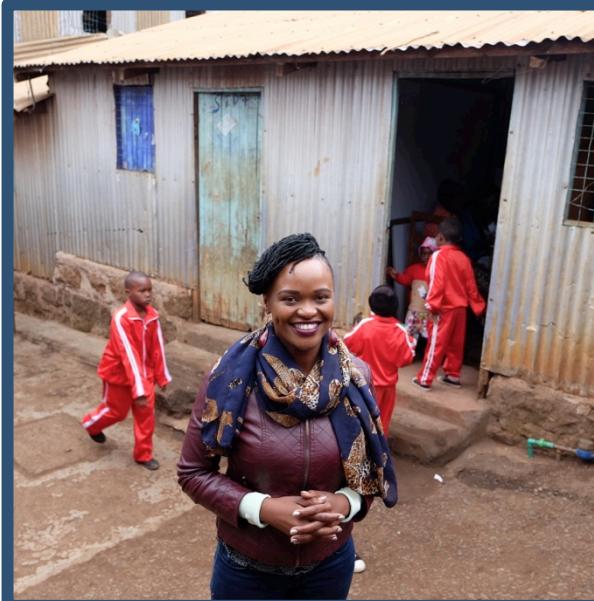


If you always do
what you always did,
you will always get
what you always got.

Albert Einstein



welcome to the metis way



Are you a learner?
Leader? Entrepreneur?
Do you want to improve learners' experiences?
The education system as a whole?

the metis way is for you.
This toolkit is for you.
It's a step-by-step guide to
unlocking your genius
and creating positive impact.

what is the metis way?

the metis way is about acting on the knowledge that collectively, we can transform difficult challenges into powerful opportunities to improve education for all.

the metis way is a process that facilitates the creation of new & relevant learner-centered solutions.

the metis way is:

collaborative

cyclical

strengths-based

Further reading

Inspiration for this toolkit came from the following sources, which should be explored for deeper understanding of our approach:



African Leadership Academy
Developing the next generation of African leaders

seeing challenges as opportunities



How might we strengthen relationships between parents, students, and schools in informal settlements?

How might we support university leaders to lead sustainable and financially transparent institutions?

How might we create a strong community of adult learners who support each other to continuously improve their practice?



the metis way

A design-thinking approach to collective impact in education



m

**make
meaning**



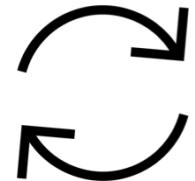
e

empathize



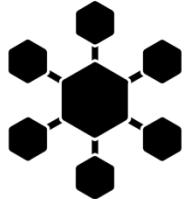
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tackle



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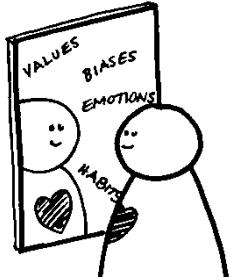
iterate



s

share

metis mindsets



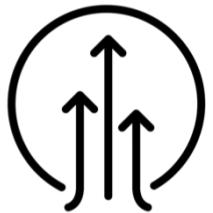
practice self-awareness

We look in the “mirror” often to understand how who we are shapes what we see and how we design.



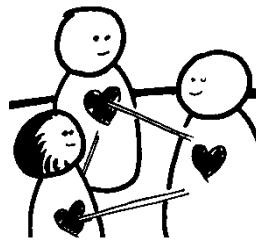
bias towards experimentation

The complexity of reforming education requires courageous action. We build to think and learn.



focus on transformational change for learners

Everything we create must enable more learners to access an equitable and excellent education.



build trust

We intentionally invest in relationships, especially across difference. We hold space for deep reflection and listening.



seek liberatory collaboration

We bring together innovators with diverse backgrounds and viewpoints. We recognize differences in power & identity. We design “with” instead of “for”.



be mindful of process

As we embrace the complexity of design work, we also know where we are in the design process, what methods to use in that stage, and what our goals are.

getting started

Hello, Changemaker!

You are taking a brave step to change the trajectory of learners' lives by designing new solutions that build from people's strengths, needs, and desires. Exciting! This toolkit is meant to help you structure your process and capture your thoughts. Let's begin! The first step is to define your challenge and create a project plan.

In this section:

- 0-1 Define a challenge
- 0-2 Create a project plan



We are the leaders
we have been waiting for.

Grace Lee Boggs, social activist



0-1 Define a challenge

Dreams & Gripe Session

Finding opportunities for design often begins by noticing problems. Sometimes it can come out as wishes ("I really wish our school had ____). Sometimes it can come out as complaints ("It annoys me that we're not ____.") Either starting point is fine.

Dreams/things I wish would exist



Next, flip these statements into possible design challenges. Beginning your question with "How might we..." turns the problems you see into opportunities for design! (Note: Expect that these questions will evolve over time- but it's nice to the metis way process with questions in mind).

How might we...

Gripes/things that could be better



How might we...



0-2 Create a project plan

Sketch out the end goals

What will we work to produce?

End goals:

- _____
 - _____
 - _____
 - _____

How do these goals relate to and support your organizational theory of change?

Define Indicators of Success

What measures and indicators will help us know our ideas are successful?

Measurements:



0-2 Create a project plan

Establish Constraints

What constraints will I need to manage?

Constraints:

Other Things to Keep in Mind



0-2 Create a project plan

Project Checklist

What do you need to get in place in order to enable you to get started on this project? Do you need to align schedules to conduct a challenge? Do you need to book space or request materials? Who do you want help from?

Checklist:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

The Metis Way is flexible. The process can be run in a day, a week, a year, or more. What you put into the challenge determines what you get out. The depth of insight, opportunity area, and level of concept refinement and impact will vary depending on the length of your project. For now, choose the timeline you'd like to begin working with. After getting started on the project, you may find that you wan to evolve this plan to meet the needs of your design solutions.

Below, sketch your timeline.



0-2 Create a project plan



I want to finish this iteration
of the project by:

make meaning

We are changemakers.

What challenge do we care about?

In this stage, make meaning from the challenges around you, understand that you are a changemaker, and that there are many other changemakers in your community.

In this section:

- 1-1 Explore personal moments of obligation & values
- 1-2 Understand the challenge
- 1-3 Map your community
- 1-4 Create a story of self, us, now





Never doubt that a small group of thoughtful,
committed citizens can change the world.
Indeed, it is the only thing that ever has.

Margaret Mead, anthropologist



1-1 Explore personal moments of obligation

We begin our work as changemakers with self awareness. Articulating our motivations and values helps ground our work and orient ourselves to others and to the challenges we want to collectively address.

Read

- [Find your moment of obligation, Lara Galinsky, Harvard Business Review.](#)
- [Resist that calling. It's probably not your purpose in life. Fred Swaniker, Medium.](#)

Reflect

What are your moments of obligation?

When you look back at your life, have there been moments, or a series of moments where you felt compelled to act?



1-1 Explore core values

Explore

- Read the list of values [here](#) and circle ten values that you feel are most important to you
- Cross off 5 of those values, leaving 5 that you feel are most important to you
- From your list of 5, cross off 2, leaving 3 that are most important to you. These are likely your core values.

Reflect

- Notice the feelings that come up when you read your short list. How does your energy shift?
- Consider how the actions you take reflect your core values. Are there values that show up more often in your actions at work? At home? In social circles? With family? Do you ever notice a discrepancy between what you consider to be a "value" and actions that you take?
- Write your three core values on a piece of paper and post them somewhere prominent. Reflect on them for a week or two. See if they still feel like "core" values.
- Reflect on them every year. Are they the same? Have they changed? Do you think these would have been your core values 10 years ago?

(Activity from Elena Aguilar, *The Art of Coaching*, 2013.)



1-2 Understand the challenge

Review the challenge

Now that you've articulated what drives and anchors you, it's time to revisit what challenges you care about.

What are some things you/your team identified about the current design challenge? Capture key thoughts, constraints, and barriers from the discussion.

Share what you know

What do you believe you already know about this challenge? What would you like to learn more about? Capture your assumptions and your questions.

I already know:



1-2 Understand the challenge

What I want to know more about:

How might we...

Did your team rewrite the design question after your discussion? If so, clarify it here:



1-3 Understand your community

Map the ecosystem

You have your design challenge—fantastic! Who else cares about this challenge? Who is your community has knowledge about this challenge? Who is affected by this challenge? Who is already doing something related to this challenge?

Relevant person

Why



1-3 Understand your community

Build your team

Who are the core and extended members of your team who will work together on this design challenge? Through your discussion, what did you determine about the roles each will play and the unique goals you each have?

Core team member

Goals & role

Extended team member

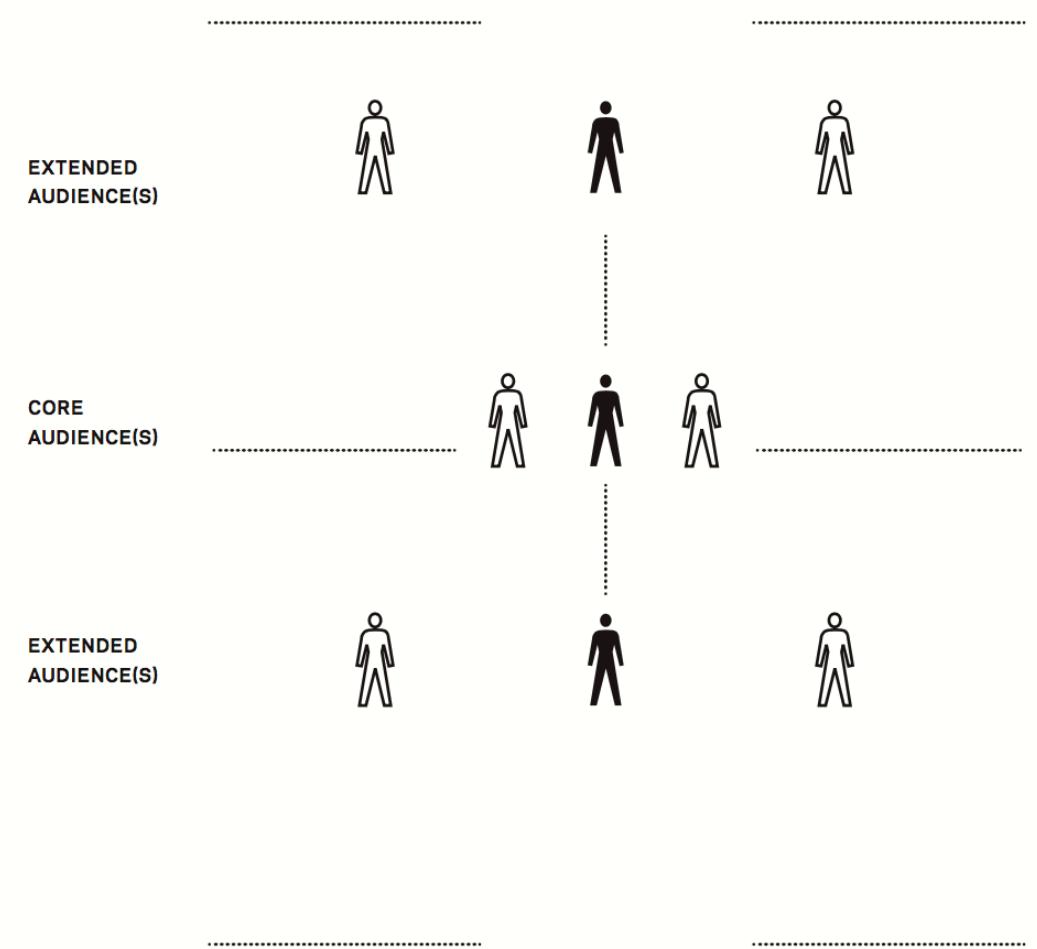
Goals & role



1-3 Understand your community

Define your audience

For whom will you be designing? Consider the core audience and extended audience. Draw a visual reminder.





1-4 Create a story of self, us, now

Read

[Telling your public story: self, us, now](#) by Marshall Ganz

Reflect

As a team, create a story of self, us, and now.

Listen to the stories of your teammates, with whom you will be working closely for the duration of the innovation process.

→ It's possible that you will not have the information or need to create a "story of now", but being mindful of this framework can help you mobilize people throughout the design challenge.

Further reading:

This narrative framework was developed by Marshall Ganz. It has been used by community organizers and leaders around the world.

Read examples of powerful collective stories at:

[inspirED](#)

[Barack Obama, DNC](#)

[Chimamanda Adichie, The danger of a single story](#)

[James Baldwin, A talk to teachers](#)

[Tom Hanks "I owe it all to community college"](#)

empathize

We look & listen to understand.

What are root causes?

In this stage, deeply understand the perspectives of your end users and refine your design challenge.

In this section:

- 2-1 Prepare research
- 2-2 Immerse & observe
- 2-3 Tell & interpret stories
- 2-4 Frame strengths & opportunities





**Nothing about us,
without us,
is for us**

South African disability rights slogan



2-1 Prepare research

Identify sources of inspiration

Who are all of the people involved in your topic? Who might represent extreme behaviors related to your topic? Which experts do you want to meet with to learn more about your topic? Brainstorm a list of people here and circle 3-5 with whom you want to engage with first.

Where can you go to have an inspiring experience related to your challenge? What are analogous settings? List as many locations as you can and circle 3-5 that you are most excited to observe first.

“There comes a point where we have to stop just pulling people out of the river. We have to go upstream and figure out why they’re falling in. “

Desmond Tutu



2-1 Prepare research

Select research participants

Who specifically do you want to talk to and learn from?
Create detailed descriptions of 3 different participants.
Ensure that they represent a diversity of experience,
gender, etc.

Participant 1

Participant 2

Participant 3

Participant 4



2-1 Prepare research

Build a question guide: interview

What do you want to learn to better understand the challenge? What are you hoping to understand about people's motivations and frustrations?

Start specific. What are some specific questions you can ask to open the conversation?

Go broad. What are some questions that can help you start to understand this person's hopes, fears, and ambitions.

Probes.



2-1 Prepare research

Build a question guide: observation

What are you looking to learn in this observation?
Capture themes & questions that you want to make
sure you get into.

Things to see

Things to do



2-2 Immerse & observe

Inspiration notes

Name of the person/interviewed/place visited

Observations and quotes

As you are interviewing, capture what you see and hear during a field visit. Capture direct quotes. Separate your observations from your interpretations so that you know what you saw and what you thought it meant for that person.

Interpretations

Tip!

Fill this out
for each
interview



2-3 Tell & interpret stories

Capture your learnings

Capture one observation, highlight, or quote per post-it note.

- Who did you meet?
- What was the most memorable or surprising story?
- What was interesting about how he/she interacted with the environment?
- What did this person care about most?
- What frustrated him/her?

Share your learnings with your team

Take turns sharing stories of the people you talked to or the places you visited.

Make sure to consult

[**Stanford d.school's Bootleg Bootcamp**](#)

for many activities to help your team share.



2-3 Tell & interpret stories

Define Insights

Insights are a concise expression of what you have learned from your research and inspiration. They are the “aha” moments and unexpected learnings.

Sometimes, it can be helpful to write an insight in the form of a Point-of-View (POV) statement which makes an insight specific to a user or user group. A simpler way to create a POV is through the POV equation.

user + need + interesting learning = POV

Insight/POV:

Insight/POV:

Insight/POV:

Insight/POV:



2-4 Frame strengths & opportunities

Identify strengths

What strengths can you identify in the people, relationships, physical spaces, current activities, etc.?

How might these strengths influence your refined design challenge?

Make Insights Actionable

Actionable and successful ideas start with the right question, which identifies important opportunities through great INSIGHTS. Remember, each “How might we” (HMW) question will only address a portion of your challenge so you can create multiple HMW’s and prioritize them for ideation.

How might we...

How might we...

How might we...



tackle

We see an opportunity. What do we create?

In this stage, ideate and prototype.

In this section:

- 3-1 Generate ideas
- 3-2 Refine ideas
- 3-3 Build a prototype





I've got news for you.
Superman isn't coming. It's up to us.

Tom Mboya, Kenyan freedom fighter



3-1 Generate ideas

Prepare for a brainstorm

There are many great activities to use to prepare for and facilitate ideation activities from the d.school and IDEO. Please consult them, and decide which activities work best for you!

[Stanford d.school's Bootleg Bootcamp](#)

[Design Thinking for Educators \(Ideo\)](#)

Below are some questions to help you plan for the brainstorm:

Invite a diverse group of people who can stay open-minded and can build on each other's ideas. 6-10 is ideal for a brainstorm. Who will you invite? Do you have voices that represent the community you are serving?

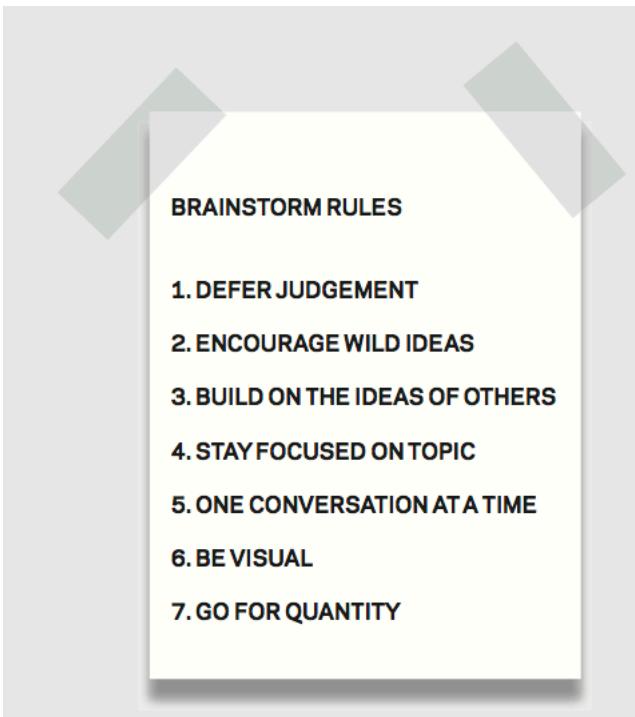
How will you set up the room to allow everyone to be able to have space to move around and see each other's ideas? Draw your set up.



3-1 Generate ideas

Prepare for a brainstorm

Here are some sample brainstorming guidelines. What will your guidelines be to support plentiful idea generation?





3-1 Generate ideas

Facilitate a brainstorm

What HMW questions are you focusing on?

What warm-up questions or activities might you use to get the group started?

Materials needed:

- Brainstorm rules
- Post its
- Wall space
- Markers
- Snacks





3-2 Refine ideas

Select Promising Ideas

After you brainstorm, cluster any related ideas, and have the team pick 3 of their favorite ideas. What are they?

Continue to consult the d.school and IDEO guides as needed to narrow down to one idea. Now let's do a reality check!

What is the real value of this idea?

What are challenges or barriers to this idea?



3-2 Refine ideas

Describe your idea

Concept name

Sketch

How does it work?

What needs or opportunities does the concept address?

One –sentence concept description:

Who does it involve, both creating and using it?

What do you hope to learn more about through prototyping?



3-3 Build a prototype

Prototypes enable you to share your idea with other people and discuss how to further evolve it. Choose the form that suits your idea best from the list below.

Create a storyboard

Visualize the complete experience of your idea over time through a series of images, sketches, stick figures or even just text blocks. Use Post-it notes or individual sheets of paper to create the storyboard so you can rearrange their order.

Create a model

Put together simple three-dimensional representations of your idea. Use paper, cardboard, pipe cleaners, fabric and whatever else you can find. Keep it rough and at a low fidelity to start, and evolve the resolution over time.

Create a mock-up

Build mock-ups of digital tools and websites with simple sketches of screens on paper. Paste the paper mock-up to an actual computer screen or mobile phone when demonstrating it.

Create a story

Tell the story of your idea from the future. Describe what the experience would be like. Write a news- paper article reporting about your idea. Write a job description. Create a letter to be sent to parents. Describe your idea as if it were published on the school website.

Create a role-play

Act out the experience of your idea. Try on the roles of the people that are part of the situation and uncover questions they might ask.

Create an ad

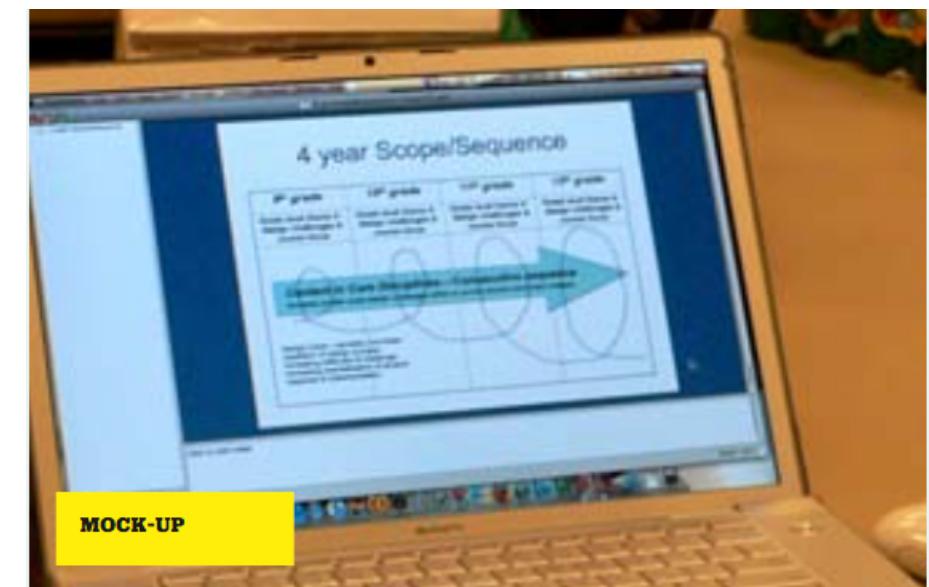
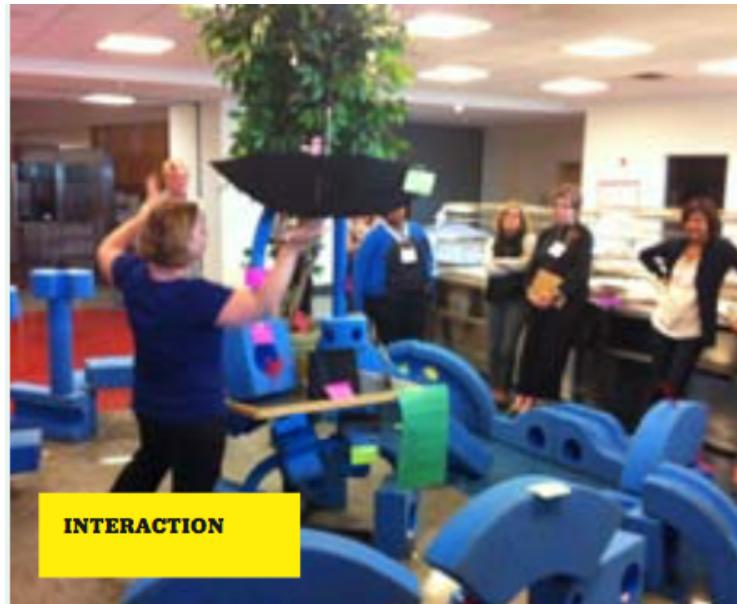
Create a fake advertisement that promotes the best parts of your idea. Have fun with it, and feel free to exaggerate shamelessly.

Create a diagram

Map out the structure, network, journey or process of your idea. Try different versions.



3-3 Build a prototype



iterate

We tried something new.
How do we evolve it?

In this stage, improve your innovation and track its impact.

In this section:

- 4-1 Seek feedback
- 4-2 Integrate feedback
- 4-3 Define success
- 4-4 Document progress





**Fail often
so you can succeed sooner.**

Tom Kelley, IDEO



4-1 Seek feedback

Identify Sources for Feedback

How do you need to test your prototype in order to receive the most relevant feedback? Can you let people experience your prototype without further explanation by leaving it in various places? Do you need to walk people through the experience of your prototypes? What will your testing session look like?

What about your idea do you need to test?

What kind of feedback do you need in order to iterate and refine your idea? What is the most important question you want to ask? Are you trying to learn whether people would participate in a new activity you designed?



4-1 Seek feedback

Select Feedback Participants

Who do you want to engage in the feedback process? Who will you learn the most from? Include people you have met during your field research as well as new participants.

Build a Question Guide

It is likely that as you have made your idea tangible, you have developed questions about how the prototype should work, what people are interested in, how to best engage participation, etc. During your feedback session, you'll want to ask for specific feedback about your idea. What would you like to know more about?



4-2 Integrate feedback

Reflect

Review the goals you set out in the getting started section of this workbook. Reflect on how your vision maps to where you are today. How has your concept been used? Is the prototype being used by the people you intended it for? What do they appreciate about your concept?

Features to evolve



4-2 Integrate feedback

Identify what's needed

List the materials you will need to build your refined concept. Are these supplies available at your school? Will you need to purchase any new assets?

Identify who is needed



4-3 Define success

What does success mean to you?

What do you wish to see happen with this project? Are you hoping that a large number of colleagues attend an event? What would you tell the school's leadership in order to receive more funding? What would you like to hear a student say about your idea?

Impact we are looking for

Method for tracking

How will you track and measure the success of your design solution? Will you ask people about the concept? Are you waiting for someone to approach you?



4-4 Document progress

Document progress of your concept. What different behaviors have you noticed since implementing your concept? Have the relationships between people changed? What comments have you received from your students or peers?

What do you need to illustrate the “before/after” impact overview of the design solution? Do you need to gather images? Quotes?

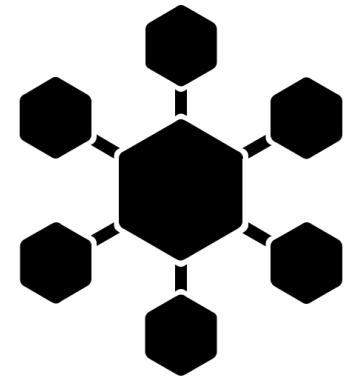
share

We share our learning. How do we support others?

In this stage, share tools, systems, or knowledge you created.

In this section:

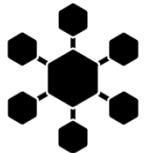
- 5-1 Engage others
- 5-2 Share your story





If you want to go fast, go alone.
If you want to go far, go *together*.

African proverb



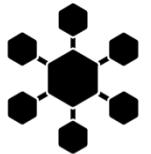
5-1 Engage others

Build partnerships

Which organizations or individuals have capabilities you are missing in order to realize your idea? How can you reach out to them?

What are you asking from them? Consider adapting your pitch to speak directly to this audience. Why would they be interested in helping? How do both parties hope to benefit from a partnership?

Who can benefit from what you've created?
Who can benefit from what you've learned?
How can you share?



5-1 Engage others

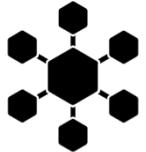
Expand your community

Advancing your understanding of the metis way is best done through repeatedly undergoing the process with new design challenges. Having a network of people you can bounce ideas off is essential to moving your thinking forward. Who will you invite to your design network?

Who will you meet?

How often?

Where?



5-2 Share your story

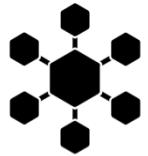
Remember your process

Use photos to illustrate where possible.

What was the most crazy brainstorm idea?

Share a few initial concepts or prototypes.

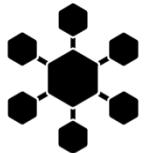
What sort of feedback did you receive on these concepts?



5-2 Share your story

Concept/prototype

Feedback



5-2 Share your story

Figure out what story to tell

Perhaps you & your team have a clarified story of self, us, now that will motivate others in your community to join you in the use of implementation of your innovation.

Perhaps you want to share the story of self, us, and what you've learned until now, so others can undergo the same process.

Find platforms

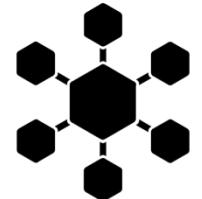
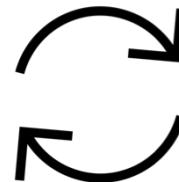
- Who might benefit from your learning?
- How can you share your stories with them?
- In community meetings? At conferences? On the radio? In local newspapers? On blogs or international online platforms?

Check out the following online platforms to get you started:

Huffington Post
Medium
Teacher's Guild



the metis way



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make meaning

We are changemakers.
What challenge do we care about?

empathize

We look and listen to understand.
What are root causes?

tackle

We see an opportunity.
What do we create?

iterate

We tried something new.
How do we evolve it?

share

We share our learning.
How do we support others?

Essential reading

[Asset-Based Community Development \(ABCD\)](#)

[Design Thinking for Educators \(Ideo\)](#)

[Liberatory Design Cards](#)

[Public Narrative: Story of Self, Us, Now](#)

[Public Narrative Worksheet](#)

[Stanford d.school's Bootleg Bootcamp](#)



A photograph of a classroom scene. In the foreground, several students are seated at a wooden desk, writing in notebooks with pencils. One student on the left is looking towards the camera with a smile. In the center, a teacher wearing glasses and a patterned headwrap is smiling and looking towards the right. In the background, there is a chalkboard and a world map on the wall.

Together, we can build education ecosystems across Africa that prepare learners—from cradle to career—with the skills, mindsets, and opportunities they need to create a better future for themselves and us all.