2024 CLA CASE COMPETITION
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Case Title:

Using CLA Principles for Collaborative and Effective Learning Agenda Design Facilitation: A GH PEARL Case Study

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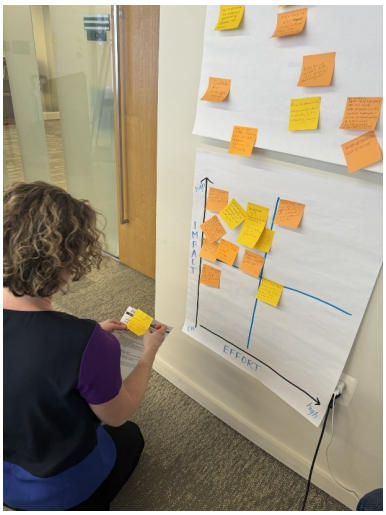

Participant places a potential learning question along the Impact vs. Effort Grid during the GH PEARL in-person partners' meeting. Credit: Morgan Brown.

Summary:

Implemented by a consortium of seven partners dispersed across three continents, the newly launched Global Health Program Evaluation, Analysis, Research, and Learning (GH PEARL) project conducts monitoring, evaluation, research, and learning (MERL) activities in family planning; reproductive, maternal, newborn, and child health; nutrition (FP/RMNCH+N); and other priority global health areas.

The project leaned on Collaborating, Learning, and Adapting (CLA) components and subcomponents, particularly internal collaboration and knowledge management, to develop and implement an interactive learning agenda design session during the project's first in-person partners' meeting. This case study outlines the facilitation strategy and highlights the CLA approaches used to optimize this process.

Meeting attendees consisted of a large group with varying expertise, and GH PEARL needed to harness everyone's knowledge to effectively develop the project learning agenda. While all team members were technical experts, each had differing experiences with and knowledge of CLA. Therefore, internal learning was a crucial first step.

The process began with capacity strengthening to learn more about CLA and the learning agenda process. Participants were then led through a hands-on participatory session with brainstorming, prioritization, consensus-seeking, and operationalization activities. Following the meeting, outputs were collected, transcribed, and synthesized to inform a draft of the project's learning agenda. Additionally, a learning agenda technical advisory group (TAG) was identified to guide implementation and adaptive management of the learning agenda throughout the life of the project.

By intentionally integrating CLA into this process, the effectiveness of the GH PEARL team was improved by increasing knowledge and understanding of CLA, cultivating relationships between partners, and fostering learning agenda buy-in through joint ownership.

1. **WHAT: What is the general context in which the case takes place? What organizational or development challenge(s) or opportunities prompted you to collaborate, learn, and/or adapt?**

Launched in October 2023, the Global Health Program Evaluation, Analysis, Research, and Learning (GH PEARL) project facilitates the effective generation and use of high-quality data and evidence to strengthen policies and program implementation to improve health and save lives in low- and middle-income countries.

The project is co-managed by the Offices of Maternal and Child Health and Nutrition (MCHN) and Population and Reproductive Health (PRH) in USAID's Bureau for Global Health. GH PEARL is implemented by a partner consortium led by the Carolina Population Center at the University of North Carolina at Chapel Hill in partnership with GEMNet-Health; icddr,b; Ifakara Health Institute; Palladium International; Q2 Impact; and Tulane University.

With such a large team with varying expertise across monitoring, evaluation, research, and learning (MERL) and family planning; reproductive, maternal, newborn, and child health; and nutrition (FP/RMNCH +N) disciplines and contexts, GH PEARL needed a way to harness the knowledge of the partner consortium to ensure buy-in and effectively develop the project's learning agenda.

Myriad resources exist for developing learning agendas, from frameworks such as the Four Ds (Define, Discover, Design Deliver) to checklists for good learning questions. Facilitation resources on how to collaboratively accomplish this, however, are scant.

GH PEARL leaned on Collaborating, Learning, and Adapting (CLA) components and subcomponents to develop and implement an interactive learning agenda design session during the project's first in-person

2. **What two CLA Sub-Components are most clearly reflected in your case?**

Internal Collaboration

Knowledge Management

3. **HOW: What steps did you take to apply CLA approaches to address the challenge or opportunity described above?**

Step 1: Capacity Strengthening
Before diving into learning agenda design, two sessions—CLA 101 and Learning Agenda 101—were held to orient partners to relevant principles, definitions, and requirements. These interactive sessions allowed participants to become familiar with CLA components and expectations of a good learning agenda. This intentional capacity strengthening set the stage for cultivating a culture of learning and adaptive management.

Step 2: Collaborative Brainstorming
With sufficient baseline knowledge of the task ahead, participants jumped into internal collaboration. To unearth potential learning questions, the four GH PEARL Intermediate Results (IRs) were written on large sheets of flip chart paper and placed around the physical meeting space. Participants from USAID and consortium partners were provided with stacks of sticky notes and placed into four groups. Each group brainstormed learning questions and added them to the poster. For virtual participants, a shared online slide deck was used to mirror the setup of the room.

After ten minutes, the groups rotated to the next IR to add their questions, share openly, and build off what the previous group had done. This snowball method of brainstorming allowed for real-time iteration and refinement while also following the knowledge management cycle of capture, document, synthesize, and share. After groups visited each IR station, IR leads debriefed the full group by verbally sharing the more than 90 potential learning questions generated through this process.

Step 3: Prioritization
To narrow down and focus on potential questions for inclusion in the GH PEARL Learning Agenda, a prioritization exercise was conducted using an Impact vs. Effort Grid. Participants were asked to return to their sticky notes and move them into the appropriate quadrant of pre-made flip-chart grids.
• Low-effort, low-impact questions are deemed “fill-ins” and should be avoided.
• High-effort, low-impact questions are deemed “thankless tasks” and should also be avoided.
• Low-effort, high-impact questions are “quick wins” that the team could move forward with.
• High-effort, high-impact questions would be “major projects” but should be considered.

Step 4: Consensus Seeking
Next, the nominal group technique was used to seek consensus on which questions to potentially move forward with. Each participant was given a strip of ten stickers and asked to vote on the questions they felt most strongly about including in the learning agenda based on feasibility, relevance, and focus, as well as their expertise, knowledge, and passion. This form of independent, democratic decision making gave all participants an equal voice and resulted in three prioritized questions per IR based on the number of votes received to use for the final step.

Step 5: Methods for Operationalization
The final activity asked participants how GH PEARL will operationalize the learning agenda and add to the technical evidence base. For each prioritized question, participants were asked to individually do the following:
• On a blue sticky note, propose methods or activities that could help answer the question.
• On a green sticky note, note why GH PEARL is well-suited to answer this question.

4. **RESULTS: Choose one of the following questions to answer.**

We know you may have answers in mind for both questions; However please choose one to highlight as part of this case story

B. ORGANIZATIONAL EFFECTIVENESS

Intentional integration of CLA has improved the effectiveness of the GH PEARL team by increasing knowledge and understanding of CLA, cultivating relationships between partners, and fostering buy-in of the learning agenda through joint ownership.

This effort marked the first time most participants were involved in developing a global project's learning agenda. Thus, a steep learning curve existed in understanding what a learning agenda looked like and what the group wanted to learn and prioritize. Through the process outlined above, consortium partners co-created the first draft of the learning agenda. This collaborative, interactive, and facilitated session harnessed the full breadth of knowledge in the consortium and engaged all partners in the process.

By dividing participants into groups with other consortium partners, organic connections were formed and authentic sharing occurred. The mix of group and individual activities throughout the learning agenda design session created a culture of openness, allowing participants to share thoughts in ways that worked for them, either written or verbally. Engaging all participants equally broke down hierarchies, allowed for greater knowledge capture, and led to increased internal collaboration.

Finally, by dedicating a large amount of time during the partners' meeting and involving participation from USAID and across consortium partners, the process created a greater sense of enthusiasm, excitement, and buy-in around the learning agenda. Because partners feel a sense of ownership and can see their contributions reflected in the product, the team anticipates improved participation in the learning agenda moving forward. This will lead to more learning questions being answered, better learning activities being effectively implemented, and stronger learning products being developed.

5. **ENABLING CONDITIONS: How have enabling conditions - resources (time/money/staff), organizational culture, or business/work processes - influenced your results? How would you advise others to navigate any challenges you may have faced?**

As a MERL-focused project, a barrier to integrating CLA into learning agenda development was participants' unfamiliarity with CLA. It was important during the capacity strengthening step to distinguish between a research agenda and a learning agenda through questions like: Is this internal or external facing? Do we use the technical evidence base or contribute to the technical evidence base? Does this apply only to technical work or operations as well?

Prioritizing capacity strengthening at the outset ensured representatives from all seven consortium partners were clear upfront about the CLA subcomponents and how they can be leveraged for organizational effectiveness across all activities. Before diving into this collaborative process, everyone needed to be on the same page.

It was also critical to emphasize that CLA is everyone's job—it is not a separate workstream but a lens through which all work should be viewed and done. Gaining buy-in from operations and process-focused participants was a challenge, as CLA examples are often more technical and focus on service delivery successes. GH PEARL is keen to build examples of CLA in action and will offer ongoing internal learning opportunities about CLA topics.

A key enabler of this process was GH PEARL and USAID leadership's support for CLA integration. GH PEARL leadership has modeled the CLA behaviors they wish to see, created an open environment for sharing and listening, and provided the resources—time and funding—to allow staff to pause and reflect. In fact, pause and reflect sessions and after action reviews (AARs) are a requirement of all GH PEARL

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