2024 CLA CASE COMPETITION
COLLABORATE • LEARN • ADAPT

Case Title:

The integration of the CLA approach for the design of the Carvajal Foundation's portfolio

Name:

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Organization:
Fundación Carvajal

Summary:

(Approximate Word Limit: 200-250)

Carvajal Foundation team during the development of one of the P&R sessions

The Carvajal Foundation is a non-profit organization with the purpose of contributing to overcoming poverty in prioritized households. In its 2023-2026 Strategy, it establishes as its mission to design and implement innovative social methodologies in Valle del Cauca and the north of Cauca, aimed at improving the educational conditions of the home, income generation, and personal development.

Within this Strategy framework, the goal is for the social methodologies and programs to be evidence-based and have the potential for transfer and scale at national and international levels, with the objective of amplifying impact and contributing to strengthening the capacities of ecosystem actors.

Considering the challenge of scaling impact, the Collaboration, Learning, and Adaptation (CLA) approach and its subcomponents of internal collaboration, technical evidence, and pause and reflection (P&R) are used to support the design of the organization's product portfolio, aimed at strengthening ecosystem skills.

To achieve this, a route consisting of four stages is designed and implemented: planning, implementation, validation, and adaptation, in which actions for evidence generation and P&R spaces are decisive.
The product portfolio includes three lines: Transfers, Community and Training, Expert Advisory, and has successfully positioned itself within the ecosystem, impacting 14 organizations through 29 partnerships, representing a total of $3,142 million Colombian pesos (COP) (USD 776,516[1]).

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[1] RMR: 4.046,38 COP

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?**

(Approximate word limit: 250-300)

In 2023, the Carvajal Foundation defined a new institutional strategy aimed at contributing to overcoming poverty as its central purpose, acknowledging the social and economic challenges of the environments.

As an institution, it was decided to leverage the learnings from its experience and build on what has been achieved, focusing on households as the center of intervention to support them comprehensively in their goal of overcoming poverty. Additionally, the aim is to impact the ecosystem through innovative social solutions, using the experience gained over more than 40 years.
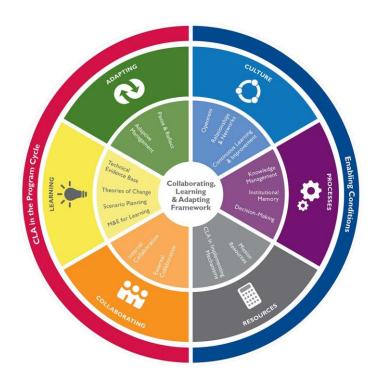
Regarding the challenge of scaling social solutions and amplifying their impact, the decision was made to generate a learning agenda that utilizes different mechanisms, including P&R spaces, where evidence is presented, and based on strategic, high-quality, and effective questions, delves into topics previously unaddressed, strengthening the critical capacity of the Carvajal Foundation's collaborators.

As an organizational opportunity, the importance of disseminating and making the results of the P&R sessions available to the entire organization was recognized to facilitate decision-making and the adaptation of programs to meet needs, allowing their transfer to other ecosystem actors and their mobilization to other regions.

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

Learning
Technical evidence base

Adapting
Pause & Reflect

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

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Within the framework of the institutional Strategy, the Carvajal Foundation takes on the challenges of amplifying its impact through a scaling process and designing its product portfolio. To this end, the Knowledge Management and Evaluation team, supported by FHI360 in their organizational strengthening efforts, deployed a methodological route within the CLA approach, including the subcomponents of internal collaboration, technical evidence, and pause and reflection.

To assess the scaling potential of the programs, the route has four stages was designed and implemented:

1. **Planning:** In this first stage, analysis categories were defined to examine whether each program had documentation, registered trademarks, systematizations, evaluations, transfers (to which institution and in which territory), literary works, audiovisuals, and courses/content on the Carvajal Foundation's e-learning platform. Additionally, a competitive benchmarking exercise was conducted, identifying how other organizations carried out scaling processes by analyzing commonalities, differences, and points to highlight. These analyses led to the design of the State of the Art instrument.

2. **Implementation:** During the implementation stage, technical evidence was gathered, and the State of the Art instrument and its respective categories were completed. Additionally, standards from organizations such as the World Bank, Inter-American Development Bank (IDB), and Stanford University were used as references, and criteria were defined to analyze the scaling potential of the programs: evidence, transfer, and distributive model, with a percentage assigned to each criterion.

3. **Validation:** For this stage, the first P&R space was structured, titled "Assessment of the maturity level and scaling potential of the Carvajal Foundation's programs," where leaders, coordinators, and technical team members participated. Based on their individual perspectives (experience and knowledge) and the presented technical evidence, they reviewed the compliance with the criteria. The sum of the criteria resulted in the program's maturity status in percentage. Ranges and states for assessment were defined: initial (0-25%), basic (26-50%), satisfactory (51-70%), advanced (71-90%), and optimal (above 90%). In this stage, questions inspired by the CLA were posed to deepen and generate insights into the application experiences of the programs and help determine their scaling possibilities in light of the 2023-2026 Strategy.

4. **Adaptive Management:** This final stage featured a second P&R space called "Innovative Minds, a space to reimagine the Carvajal Foundation's intervention," where the consolidated results of the maturation exercise and critical factors for innovation and scaling were shared. Collaborators were invited to think of innovative social solutions and possible operational routes from the areas of Social Innovation and Scalability.

The outcome of these exercises refined the products and services of the institutional portfolio, consolidated into three lines: 1) transfers, 2) community and training, and 3) expert advisory, enabling the Foundation to share its knowledge with other actors and generate new income sources for its sustainability.

The implementation of this route, inspired by the CLA approach, was effective due to the existence of a strong knowledge management culture in the organization, facilitating the conscious adoption of collaborative practices that promote learning, innovation, and adaptability. Additionally, the critical capacity of the collaborators was strengthened, encouraging them to ask the right questions.

In the future, it is expected to continue using the CLA approach to evaluate and update the portfolio.

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

A. DEVELOPMENT RESULTS: How has using a CLA approach contributed to your development outcomes? What evidence can you provide?
(Approximate word limit: 250-300)

Historically, the Carvajal Foundation has supported the most vulnerable communities through the implementation of programs and social methodologies aimed at strengthening income generation, educational conditions, and personal development. In the past, some of these programs were transferred to other ecosystem actors, but not as part of an institutional strategy focused on amplifying impact. It is now necessary to deploy a formal scaling strategy using CLA resources to broaden the impact.

Consequently, following an assessment of the maturity level and scaling potential of the programs with the technical teams, the Foundation's product and service portfolio is intentionally structured. This also responds to a mandate from the organization and the Carvajal family, who seek to share knowledge and experience with others.

From the consolidation of the portfolio, peer organizations within the ecosystem have been strengthened, while learning from them, combining efforts, and diversifying income sources. Notably, by June 2024, 14 organizations have been impacted, reaching 236 people directly and 3,273 indirectly. This has resulted in 29 partnerships amounting to $3,142 million COP (USD 776,516), resources that contribute to the organization's sustainability and support the mission of helping households overcome poverty.

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?

(Approximate word limit: 250-300)

For over 14 years, the Carvajal Foundation has been systematizing its experiences and generating lessons learned. However, it is since 2023 that intentional and systematic P&R (Pause and Reflection) spaces have been implemented within various processes and projects to identify learnings and manage their adaptation, using methodologies such as After Action Review (AAR), Fishbowl discussion, Coffee Around the World, and Chalk Talk.

The approach to asking the right, high-quality, and effective questions has been refined, enhancing the emotional intelligence of teams by delving into topics that previously went unnoticed and strengthening collective critical capacity.

These spaces have proven to be useful and practical for understanding and further deepening what happened, why it matters to the organization, and what it means, as well as for disseminating learnings among teams. Evidence is recognized, and learnings are constructed to aid future decision-making, improving the efficiency, effectiveness, and sustainability of actions.

The most challenging aspect of their implementation is getting teams to share their mistakes, as humans tend to

perceive discussing elements that didn't go well as questioning the work done. It is essential to change this perception and use it for continuous improvement and adaptation.

For positioning P&R spaces as an institutional strategy, the support of leadership has been crucial. They have convened these spaces and utilized the resulting reports for decision-making, overcoming the risk of this information remaining just on a paper.

P&R spaces are beginning to impact the culture and processes (the DNA) of the Foundation through reflective inquiry, as they have started to be strategically applied in the broader social innovation process.

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