2019 CLA CASE COMPETITION

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Case Title:

Making the most of our potential:Using CLA to intentionally increase cross-sectoral learning

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Organization: RTI International

RTI staff collaborate across sectors through the Philippines Learning Summit
Credit: RTI International, Paolo Fernandez

Summary:

RTI International works across the world in the field of international development, implementing programs in a number of different sectors such as Agriculture, Energy, Health, Governance and Education. Within the past few years RTI has focused internally on intentionally growing our efforts to share and learn from each other across the organization, using a CLA approach to guide us.

One of the ways we have tried to institutionalize CLA throughout RTI has been our Monitoring, Evaluation, Research, Learning and Adapting Community of Practice (MERLA CoP). This internally funded group has had a lot of fun collaborating across RTI to discuss MERLA related issues and problem solve together. The CoP is made up of both home office and field office staff, and is an open space for questions, resource sharing and MERLA work. We have grown over the past two years to be 60+ members.

One event that the MERLA CoP hosted that was particularly exciting was our Philippines Learning Summit. This event brought together staff from our four USAID funded programs in the country as well as other implementers, local partners and USAID to share learnings, both successes and challenges, about implementing CLA within their work. We also held an internal retreat, which focused on actionable ways to collaborate more intentionally across the four programs.

We believe that these efforts are leading to new connections with staff across sectors and regions, producing higher quality implementation, and eventually, improved outcomes for our programs.

Think about which subcomponents of the Collaborating, Learning & Adapting (CLA) Framework are most reflected in your case so that you can reference them in your submission:

- Internal Collaboration
- External Collaboration
- Technical Evidence Base
- Theories of Change
- Scenario Planning
- M&E for Learning
- Pause & Reflect
- Adaptive Management
- Openness
- Relationships & Networks
- Continuous Learning & Improvement
- Knowledge Management
- Institutional Memory
- Decision-Making
- Mission Resources
- CLA in Implementing Mechanisms

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

Within international development, cross-sectoral learning is essential for success but can be challenging to achieve. RTI implements programs across sectors such as global health, food security, education, governance, energy and environment; often, RTI works in several sectors within one region or country. In the Philippines, RTI has implemented work on health, education, and energy resilience for over 10 years. This breadth of programming provides an ideal opportunity for cross-sectoral learning. However, programs have rarely come together to share experiences across sectors.

Recently, RTI invested internal funds to unite programs across different sectors, deciding to use an intentional CLA approach to bring these divisions together. Initially, we invited experts from the field and other implementing partners to share their experiences with CLA with our home office. These conversations highlighted the need to bring perspectives from the different sectors to our field programs. RTI then hosted a learning summit where home office and field office staff came together and shared CLA experiences from their programs and brainstormed on how to collaborate, learn, and adapt more intentionally together.

2. Why did you decide to use a CLA approach? Why was CLA considered helpful for addressing your organizational or development challenge(s)?

RTI has developed an overarching MERLA approach for international development program implementation. The MERLA approach integrates traditional M&E and operations research with USAID's CLA best practices to create rapid feedback loops for intentional learning and evidence-based decision making. Understanding the importance of a systematic and intentional approach, RTI has invested internal funds to create a MERLA community of practice which brings together home office representatives from RTI's different sectors on a regular basis to standardize tools and share learnings from different programs. This community of practice, grounded in a CLA outlook, supported the idea of a Philippines learning summit.

At the same time, in the Philippines, USAID Mission staff were sharing CLA approaches with individual programs, especially within the health office. The engagement from the Mission bolstered RTI's interest in supporting the programs to take a CLA approach in their work across sectors in the Philippines, as the environment was supportive of integrating and innovating with CLA.

We saw that CLA would improve our intentional collaboration amongst programs and bolster a feeling of a united RTI portfolio rather than a series of independent programs. This is something that our Chiefs of Party and program teams had expressed previously but had not had the time or resources to prioritize.

3. Tell us the story of how you used a collaborating, learning and/or adapting approach to address the organizational or development challenge described in Question 2.

In order to bridge the gap in intentional collaborating and learning across sectors for improved development outcomes in the Philippines, we leveraged the MERLA community of practice. This community of practice was developed to create a cohesive MERLA strategy across international development programs within RTI. It aims to create a culture of learning and a mechanism to work more closely with and learn from staff across international development sectors.

In May 2018, the community of practice hosted a learning symposium in Washington, DC where a panel of guests from different institutions discussed CLA approaches based on their experiences. After the event, one of the panelists—Easter Dasmariñas, a CLA champion of USAID's LuzonHealth program in the Philippines—proposed a similar event in Manila for all RTI programs working in the Philippines. RTI implements health, education, and energy resilience programs in the Philippines, which made Manila an ideal location for a cross-sectoral event. Ms. Dasmariñas explained that the programs did not have a systematic way to share experiences, find commonalities, and learn lessons from one another. The community of practice agreed that a learning summit in the Philippines would be an ideal way to share learning and adapting experiences from the field and discuss ways to move beyond traditional M&E to intentional and dynamic learning and adapting.

The event's success required coordinated effort across RTI's programs. To engage both field and home office staff across programs, a diverse core steering committee planned the event. The committee worked to create a dynamic, discussion-based gathering through an agenda including brief presentations from external partners and dedicated discussion time focused on understanding internal program challenges and identifying ways to address those challenges through a CLA approach. The event was discussion based, and moderators prompted table groups to discuss the successes and challenges panelists brought up during their stories. The event both opened and closed with networking opportunities so participants could discuss and find new collaborative possibilities.

The learning summit, titled "From learning to adapting: How do we get to learning, and where do we go from there?", was held in August 2018. The event brought together an audience of nearly 140 people representing a wide spectrum of international development sectors. All RTI programs in the Philippines, along with additional partners, exchanged experiences (both successes and challenges) of incorporating the principles of learning and adapting during implementation. Representatives of the Philippine government, NGOs, private sector partners, USAID and RTI programs listened to stories on learning and adapting and then discussed the successes and challenges faced while implementing a CLA approach.

After a morning of storytelling and conversation, all program staff were invited to an RTI retreat focused on identifying and breaking down barriers for a more collaborative RTI in the Philippines, the Western Pacific region, and the world. Through a prioritization activity that weighed overall effect and effort, we focused on solutions for collaborating more systematically between programs. We identified a few solutions to start sharing more consistently from as simple an activity as including information about all programs in staff onboarding to beginning a Philippines MERLA community of practice where MEL staff could come together and discuss program results and challenges and share back with their own teams.

4. Organizational Effectiveness: How has collaborating, learning and adapting affected your team and/or organization? If it's too early to tell, what effects do you expect to see in the future?

The learning events in DC and Manila, which engaged both home office and field staff, were the first of their kind at RTI. They served as a pilot that has ignited exciting discussions of what is possible when we provide our programs with the resources to encourage a true culture of learning. Through the learning summit in the Philippines, we have cultivated a message of valuing cross-sectoral effort.

The learning summit inspired program staff to develop an ongoing platform for gaining insights from one another. In the Philippines, RTI programs now look for opportunities to share personnel skills, regularly exchange quarterly reports, and meet together once a quarter to discuss and brainstorm solutions for implementation challenges. The programs identified MEL as one of their strongest commonalities and so have created their own MERLA community of practice, which has recently begun to meet and create goals. Within this community, RTI has discovered that sectors share many commonalities and that establishing space for regular communication provides an efficient and effective way forward. For example, several programs focus on policy change, grants and scaling innovations; when the community of practice meets, the agenda may include time to look for lessons learned in these areas. Programs also prioritized sharing information on their efforts to include stakeholders in operations research and learning, and how they have been able to be effective in this capacity building effort.

5. Development Results: How has using a CLA approach contributed to your development outcomes? What evidence can you provide? If it's too early to tell, what effects do you expect to see in the future?

Although this shift has led to exciting new connections, learnings, and adaptations, it has not yet concretely affected development outcomes. The Philippines learning summit took place seven months ago, and we believe that the programs are developing capacities for reflection, research, analysis, and dialogue which will ensure learnings are generated and shared. These learnings are informing improvements in program implementation. Through a collaborative and engaged CLA approach with an emphasis on country government and local stakeholder ownership, we believe that the programs will benefit from not just more intentionally including our partners in international development but that this will also increase the effectiveness of our work.

Peer-to-peer exchanges facilitate reflection, documentation, and cross-application of what works, what does not, and what should be scaled up. We expect to see cross-sector learning in RTI's Philippines programs, which will lead to new efficiencies and cost savings. We also expect that through sharing lessons learned and successes across sectors on common topics such as policy change, we will achieve results more quickly.

6. What factors enabled your CLA approach and what obstacles did you encounter? How would you advise others to navigate the challenges you faced?

Many factors contributed to the success of the learning summit in the Philippines. Perhaps the most important factor was the degree to which field staff felt appreciated and acknowledged. The internal investment highlighted the degree to which the executive leadership valued program staff and their work. Additionally, USAID supported the programs to attend and participate, which further reinforced the importance of the event. This sense of recognition created a feeling of excitement and camaraderie, which in turn resulted in a widespread willingness to be present for and engage with the discussion. The programs' chiefs of party also showed great commitment to and interest in the event and promised time and resources afterwards to continue to come together as a group to pause and reflect.

Because of the cross-sectoral nature of the event, one major challenge was ensuring that programs understood each other. The different jargon used to describe CLA within different programs and sectors hindered communication. A second challenge was that all of the programs were implementing CLA in some form, but they did not always know how the work they were doing or the processes they were using fit into CLA. The home office MERLA community of practice provided support for each program as they worked through different stories of learning and adapting. We found we could provide a common language to use, even with different sectors, but collaborating intentionally amongst RTI, instead of siloing ourselves.

When we started planning, staff from each program in the home office and field offices were very excited to participate. However, the commitment to involving as many people as possible throughout the planning process often slowed down the implementation of key activities due to a lack of clear assignments of responsibility for those tasks. Formally allocating work and responsibilities while still collaborating through regular check-ins and ad hoc reflection sessions allowed us to find a balance between including everyone's voices while allowing planning to move forward.