International HIV/AIDS Alliance

Together to end AIDS

TBC

Alliance learning & knowledge sharing strategy

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Contents

1. Introduction

1.1 Why this paper?

The restructuring in 2013 saw the Secretariat's knowledge sharing function being moved out of the Planning, Analysis and Learning team and into the newly formed Hubs, Organisational Development and Learning team. The purpose of this was to widen ownership of knowledge sharing, for the TS hubs to be more involved and to connect knowledge sharing to organisational development more explicitly. Over the past year attempts to connect more with the hubs have had limited success from a knowledge sharing perspective, however the development of the Alliance Centres concept has brought a new opportunity for knowledge sharing to be led and owned by LOs.

The Senior Management Team requested a learning strategy for the Alliance in 2014. The shift of focus from knowledge sharing to learning reflects a need to better structure the Alliance's role in knowledge sharing, capacity development, technical support and organisational development. These concepts are central to the Alliance and its model, but are not well articulated within our current theory of change and strategic interventions.

Another influence has been the requirements of the DFID PPA. Both the mid-term review and the annual reporting process require evidence of how the Alliance is strategically, and systematically, learning. This paper aims to make it easier to answer that question.

1.2 Why a 'learning organisation'?

Our aim is for the Alliance to be a learning organisation; where people are encouraged, supported and expected to create, learn, share and use knowledge together for the benefit of the Alliance and our mission. This would improve the quality, relevance and efficiency of the Alliance's work, strengthen leadership in the sector, contribute to the evidence-base for advocacy and ultimately lead to a more effective HIV response.

The results we expect to see from this strategy are:

- More effective and efficient organisations and good quality programmes which meet the Alliance's good practice and accreditation standards
- Relevant knowledge products sharing our learning which are available and accessible in a variety of appropriate formats to others working on the response
- Resource people within the Alliance and Alliance Centres who can share their learning and experiences with others
- High quality technical support providers who can train, teach and provide technical support to civil society, government and others working on the response

The Alliance's model is based on the premise that its organisations are held together by shared experiences and mutual support, rather than financial obligation. In the annual data survey, when the question on the value of being part of the Alliance is asked, LOs consistently rate knowledge management and technical support as one of the most important values they recognise of being part of the Alliance.

The Alliance already has many strengths as a learning organisation and there are plenty of examples of good practice. This strategy isn't aiming to control every activity that could be termed 'learning', instead it is intended to help promote more systematic learning practices, and create spaces for learning to happen.

1.3 Learning principles

There are a number of principles underpinning this strategy, which reinforce and demonstrate the ASS principles:

Alliance Centres

- If knowledge is power, our approach to learning is one which enables everyone, particularly the most marginalised, to both access and share their knowledge. So our priority is to enable learning between LOs, rather than from the Secretariat or a Northern consultant. At the LO level, it involves learning from and with communities; for example ensuring there are systems in place for the LO to learn from the experiences of peer educator, and to facilitate learning between communities and CBOs in their own country.
- The Alliance Centres will be central in putting this learning strategy into practice through their leadership in facilitating South to South learning and good practice programming. For other topics not covered by a Centre, our guiding principle is always promoting South to South learning (particularly peer to peer and LO to LO) as the first choice.
- However people are connected to learn, we also need to recognise that every LO is a unique organisation in a unique environment: one size won't fit all. Knowledge and learning cannot simply be 'transferred' and will always need to be adapted and contextualised.

Sustainability

- Being a learning organisation is crucial to being a sustainable organisation; one that can innovate, try different things, learn and grow.
- We also need to consider how resources spent on our learning and capacity development can be as sustainable as possible. This both involves understanding how people learn- and being wary of one off trainings or consultancies- as well as understanding what influences long term change in an organisation.

Efficiency

- There is a risk with the efficiency ASS principle that it is interpreted in the Secretariat as an excuse to de-prioritise activities which support learning, since it is 'non-essential' and rarely urgent (at least in a short term view). Being more efficient means taking the time to conduct after action reviews[1], do a literature review, document meetings and learning, and share those documents more widely (keeping on top of information management).
- An effective learning organisation is more efficient; sharing knowledge to reduce the risk of spending time and resources re-inventing the wheel. A culture of openness and a willingness to share failures is also key to avoid repeating past mistakes.

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[1] An After Action Review (AAR) is a simple process used by a team to capture the lessons learnt from past successes and failures, with the goal of improving future performance. It is an opportunity for a team to reflect on a project, activity, event or task so that they can do better the next time.

1.4 Who is learning?

The flow of learning is both internal and external, even if the focus of our actions within this strategy are LOs, the Secretariat and TS Hubs. They will need to be learning internally within the organisation, learning with and learning from their implementing partners, with and from other parts of the Alliance and with and from other organisations relevant to the HIV response in their context.
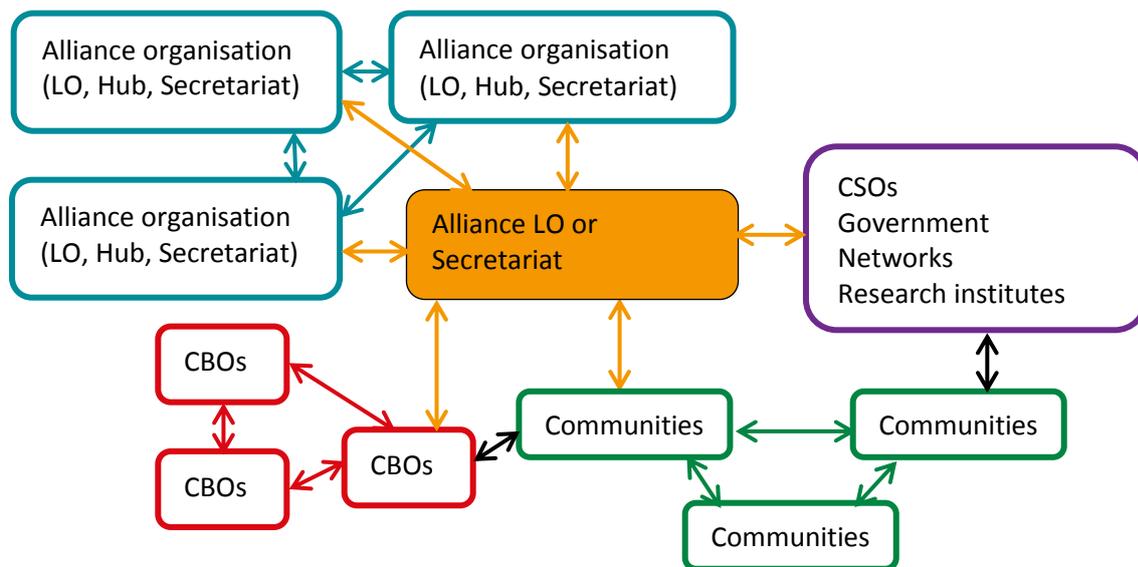
Knowledge sharing and learning happens at multiple levels; internally and externally

1.5 Who implements this strategy?

The whole of the Alliance is involved in learning and facilitating learning at different levels. Whilst there is a key role for Secretariat staff in implementing this strategy, the Alliance Centres will be key players in facilitating knowledge sharing, and the Hubs will be more central for the technical support and training elements. Key roles for Secretariat teams include:

- HODL: focus on knowledge sharing, technical support and organisational development as well as oversight of the learning strategy
- Regional teams: in developing and facilitating the SDPs, and acting as a knowledge intermediary linking LOs to each other
- Programme Impact and Policy: focus on use of learning in the organisation for external influence in technical areas, as well as generation of learning through research, innovation, monitoring and evaluation
- LRC and BD&NM: Providing expertise and advice on capacity development approaches in focus areas (eg risk, security and financial sustainability). Accreditation also plays the key role in identifying capacity development needs, as well as organisational strengths.
- HR team: for induction and exit processes and staff development in the Secretariat

2. Learning framework

The Alliance is a complex organisation and core to our work are a number of equally complex concepts, the meaning of which often overlap or mean different things: learning, knowledge sharing, knowledge management, organisational development, capacity development, technical support, technical assistance. A glossary of some working definitions are given in Appendix 1.

In order to find a way of bringing these different concepts and activities together, over the past year the HODL team has been developing a framework[2] to help us talk about the process of capacity development and learning, and the role of knowledge sharing and technical support within them. The framework started with a focus on the Strategic Development Plan process for LOs. However it is a starting point for other work; such as the development of the hubs, individual LO learning strategies, and Secretariat staff development plans.

The framework has four stages:

1. How we identify, assess and prioritise our learning needs
2. How we meet our learning needs
3. What outputs and outcomes we can expect from the learning processes
4. How we measure changes in capacity as a result

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[2] This framework draws heavily on work done by the Alliance (Nicky Davies) in 2003 (and earlier) on technical support and other capacity development tools.

1. Identifying learning needs

LOs and Hubs
Secretariat
Hub Consultants
Partners and wider civil society

- **Capacity assessments**
- **Mapping relationships and knowledge flows**
- **Learning questions**

For LOs: LO Profiles, Segmentation and Strategic Development Plans

2. Learning mechanisms

Action learning

- **Seeking new learning** - internally and externally (reading, conducting systematic reviews, peer assists, communities of practice)
- **Action Learning Cycle:** Group and individual learning processes (journals, after action reviews, workshops)
- **Research, innovation, monitoring and evaluation**: systematically following up on implementation of recommendations
- **Writing it down:** learning though writing and documenting our experiences for others (writeshops, exit interviews, synthesis)
- **Sharing our learning:** internally and externally

Connecting people in different places

- **Meetings:** Multi country programmes, blue sky weeks, directors meetings, exchanges, policy fora, partnerships
- **Secretariat and Alliance Centres** as brokers
- **Online platforms** (eg webinars, Inspire etc)

Horizontal learning

- **Learning exchanges and study tours**
- **Action Learning Sets**
- **Job shadowing / Observation**

Vertical learning

- **Mentoring / Coaching**
- **Training courses** (online, face to face, or blended approaches)
- **Task facilitation / Technical Assistance**

3. Outputs and outcomes

Effective & efficient organisations and quality programmes meeting our good practice and accreditation standards

Knowledge products

Shared through Inspire, websites, regional portals, conferences

- Documented process and learning
- Synthesis of learning
- Recorded webinar
- Short video
- Case studies, evaluations, policy briefs
- Toolkit
- Course (online or face to face)
- Blogs
- Advocacy products and donor reports

Resource people

LO staff who can do and share their experiences as part of the Alliance package of services through hosting exchanges, communities of practice, blogs etc

Alliance Centres

LOs who share learning across a theme

TS providers

Who train, teach and provide TS through the hub (associate consultants, LO staff, hub staff).

4. Assessing change

- Measure changes in capacity of organisations (6 months after the learning activity)
- M&E of capacity development process: what works?

Outputs now become resources for supporting capacity development and learning in the future

3. Step one: Identifying learning needs

In order to facitliate learning and knowledge sharing, we need to understand what it is we need to learn about. There are three approaches we can take to identifying our learning needs:

> • **Capacity assessments**
> • **Mapping relationships and knowledge flows**
> • **Learning questions**
>
> **For LOs:** LO Profiles, Segmentation and Strategic Development Plans

3.1 What competencies and capacities do we need in our work?

The first step in assessing need is to know what capacities an organisation needs to be successful. The Alliance has many organisational and capacity development tools which help us assess need. These include our capacity assessment publications, the accreditation process, needs assessments and audit. Our accreditation and good practice standards set the overall framework for the capacities that an Alliance organisation needs. For Secretariat staff we also have the competency framework that sets out how they are expected to perform. For LOs, the strategic development plan is the main place where capacity and development needs are brought together along with an action plan of how the need will be met.

All these tools can be used not only to identify learning needs, but also strengths and opportunities for the organisation to share its knowledge.

3.2 Who you know not what you know: mapping relationships and knowledge flows

An alternative approach to focusing on *what* we want to learn is to look at *who* we should be sharing knowledge with and learning from. Social Network Mapping focuses on relationships; it is a method for visualising people and connection power, leading us to identify how we can best interact to share knowledge. The process visualises individual relationships (both formal and informal), helps to identify knowledge brokers, thought leaders and experts as well as isolated individuals and knowledge bottlenecks. The aim of the process is to identify opportunities to improve the flow of information and knowledge.

3.3 Learning questions: what don't we know?

Identifying learning questions at the start of a project or programme can help ensure we are consciously learning while we are implementing, as well as providing the frame for research, monitoring and evaluation. Starting with our objectives, we ask ourselves what it is we need to learn to help us get there? What don't we know now? Which areas of our strategy are particularly new to us where we would benefit from an explicit learning plan?

4. Step two: Learning mechanisms

"Capacity building has a vital contribution to make, but it needs to be done well. We have learnt that key ingredients of this effective fertilizer are ownership; use of local knowledge; an organisation-focused approach; and cultivating new leaders."[3]

Once the need has been identified and learning objectives or learning questions developed, the next step is to identify what the most appropriate and effective learning mechanisms are.

We have divided our different approaches into those that are about action learning, connecting people, horizontal learning and vertical learning[4]. However the division is somewhat false: for sustainable learning, a blended learning approach is needed which mixes methods such as technical assistance, exchanges, mentoring, self-paced study, face to face training, communities of practice and online learning[5] in order to have the best chance of long term change.

4.1 Action learning

4.1.1 Seeking new learning (reading, systematic reviews, peer assists, communities of practice)

We often focus a lot on producing documentation and data. However there is a lot of variability in the extent to which we read, analyse, discuss and use the documentation and data available to us; both from external and internal sources.

We can support this both through actively promoting the resources we already have, building it into planning processes, and encouraging people to seek out information when they have a learning need. Managers can make a difference through encouraging and supporting their staff to make time to read and learn (for example on non meeting days, or checking that they have reviewed previous trip reports before they travel). The competency framework can be used during appraisals to both reward staff who are demonstrating a competency in this, and to identify how others could improve.

The Alliance's communities of practice are an opportunity to access the latest research on a topic, as are Secretariat LEAF sessions. There are other examples- such as the learning afternoons that KHANA hold, and the book group formerly run by the AEE team.

Action learning
- Seeking new learning
- Action Learning Cycle
- Research, innovation, monitoring and evaluation
- Writing it down
- Sharing our learning: internally and externally

Connecting people in different places
- Meetings
- Secretariat and Alliance Centres acting as brokers
- Online platforms

Horizontal learning
- Learning exchanges & study tours
- Action Learning Sets
- Job shadowing / Observation

Vertical learning
- Mentoring / Coaching
- Training courses
- Task facilitation / Technical Assistance

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[3] http://www.intrac.org/data/files/resources/803/Capacity-building-in-West-Africa.pdf

[4] *Barefoot Guide to Learning Practices in Organisations and Social Change* (2011) By the Second Barefoot Collective

[5] A good example is VSO's current leadership programme for its country directors. This involves a mix of face to face training, online action learning sets, webinars and assignments.

Draft guidance is being developed to promote the use of evidence more within the Secretariat by focusing on increasing understanding of the process of conducting a systematic review, how to judge evidence and information and when we should be proactively conducting a review or seeking new knowledge.

4.1.2 The action learning cycle

There is a perceived gap when it comes to systematically learning at the strategic level in the Alliance. This is demonstrated by the challenge we have every year when it comes to reporting to DFID on 'what the Alliance has learnt'.

More explicit use of the action learning cycle is particularly appropriate for our work in a context of emergent and complex change[6]. The cycle focuses on asking the right questions at each stage: action, reflection, learning and planning. The questions should help us to go beyond collecting, processing and reviewing data and help us create new insights and actions. It prompts us to ask not just what happened, but why, what were the underlying influences and what are the implications?

We are therefore proposing a more explicit application of the action learning cycle to the management of our strategic interventions and key restricted contracts.

As part of our planning and monitoring process intervention leads will be asked to develop 3-4 key learning questions for their intervention. What progress we have made in answering these should sit alongside reporting on the key milestones at quarterly reviews. By identifying key learning questions and making the space to explicitly answer them, should help ensure we don't get too caught up in the detail of everyday work and build in the space to reflect on the intervention as a whole. Documenting this learning will help the Alliance maintain its organisational memory beyond relying on individual staff.

The key questions to ask on a quarterly basis would be:

- What did we intend to do in the last quarter? What did we actually do? Why was there a difference?
- What have been the new challenges to the achievement of the milestone(s)?
- What have been the key positive and negative influences that have impacted on progress in the last quarter?[7]
- What progress have we made in answering our learning questions?

This requires a commitment to do this from intervention leads- so it is not just seen as a tick box exercise. It will also need honesty about what's not working- at least internally- and trying to avoid a culture of blame when things don't work.

Guidance will be available for intervention leads on applying the action learning cycle, including recommendations of tools to promote learning at the different stages.

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[6] From The Barefoot Guide to Working with Organisations and Social Change
[7] These questions are partly based on those in the DFID PPA reporting template and should therefore help to capture data to respond to this, as well as facilitating learning internally

4.1.3   Research, innovation, monitoring and evaluation

Although not covered in detail here, research and innovation, monitoring and evaluation are all key learning processes. They generate new knowledge and evidence to answer our learning questions, help us to learn from our experiences and the strong focus on documentation means that the knowledge is documented. The research group formed of LOs who conduct research is an important part of improving how research is conducted and used within the Alliance.

Could we do more to ensure that we are systematically learning from our research, evaluation and the data? Possible areas for development include a system for following up on whether evaluation recommendations have been acted upon and doing more synthesis and communication of evaluation reports. The Alliance Centres could play a key role in these processes.

4.1.4   Writing it down: learning though writing and documenting our experiences for others

"Although it is true to say that organisations cannot learn, it is reasonable to say that organisations can forget."[8]

Internally, it is often said that we are not good at documenting our work. Without documentation the Alliance has a limited or unreliable organisational memory as it relies on individual memories of discussions and processes, and on individuals passing on their experience to others.

Learning through writing: Writing and documenting our learning does not just provide us with knowledge products that others can use; the process of writing itself (or telling a story to camera) can help people to learn.

Memories are made of this: In the rush to move forward and a million things to do, documentation of workshops, meetings, activities and experiences is something that can be seen as tedious; something we only do for donors and often it is forgotten or given to the most junior person to do (but with little time set aside to do it).

Documentation doesn't have to mean long written reports, but could include recorded interviews, short films, stories and blogs. One example is of documenting learning is through the knowledge sharing exit interviews conducted at the Secretariat; they are recorded rather than written, and the interview format allows the interviewer to ask open questions to help the leaver reflect on their experience. The recording is then shared with the new starter.

There are many other creative ways to document experiences; the most important thing is to do it. Building it into workplans is the first step, alongside better understanding of the barriers to writing that are experienced across the Alliance. A further option is to hold a writeshop[9] on a specific thematic area to generate a collection of stories.

Synthesis: The generation of documentation is not enough. It is unreasonable to expect someone in POZ to read every evaluation or lessons learnt report coming from KHANA for example. But a short synthesis pulling out the lessons learnt from a number of studies and reports is much more relevant and accessible. Currently this is something that is done predominately by the Programme Impact

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[8] Bruce Britton (1998) *The Learning NGO*
[9] http://www.kstoolkit.org/Writeshops

team when producing Good Practice Guides. In the past there have been efforts to do a synthesis of Secretariat funded evaluations. Ideally in the future the Alliance Centres will take a much greater role in leading on synthesising learning, and hub consultants could be contracted to take on the work.

Another area for further work is in collecting, synthesising and sharing the learning from our technical support. The recommendations and knowledge captured in the reports by consultants contains a lot of useful learning for civil society more widely. If we were able to collect, review and extract key learning from the reports submitted by consultants to TS Hubs we would have a huge body of potential knowledge. Where it is strategic, an additional day or two in a consultant contract requiring them to write up a case study or summary for an external audience could be an efficient way of documenting more of the Alliance's work.

4.1.5   Sharing our learning: internally and externally

Communicating our learning: Sharing our learning is very much about communications; identifying audiences, key messages and appropriate formats and delivery mechanisms[10].

Sharing failure: There is a growing discussion in the development sector of the idea of how we share mistakes and failures[11]. In the Alliance, whilst often internally we are very critical (at least in conversations or meetings) we are not great at systematically sharing and documenting failures.

The failure story we had to submit as part of the year one reporting on the current PPA focused on how POZ responded to the earthquake in Haiti. Far from being a failure story, this highlighted how well POZ responded to incredibly difficult circumstances. It is very understandable that the Alliance found sharing a failure hard: only one story was allowed and few want to be that single story. It was also through a report to a donor. There are other disincentives for learning (many were noted by ICAI in their review of DFID) such as a bias towards reporting positive stories and a fear of failure.

However, following from the model successfully trialled at IPPF, we would like to encourage more open discussion of failure; initially within the Secretariat through a workshop, but moving wider to the Alliance depending on our experience. We might look at an Alliance-wide competition, a failure report or regular failure blogs.

4.2 Connecting people: platforms and spaces

It is more important to connect people to other people, rather than just connecting people to resources. We have various mechanisms for doing this within the Alliance.

Blue Sky Weeks and Directors meetings: These are a key opportunity for face to face learning and sharing for LO Directors and Board Chairs. Protecting time and space within (often packed) agendas is essential to support meaningful learning.

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[10] Change the World: A Toolkit for Citizen Journalists (2014) is an excellent resource to support better writing and communications skills.
[11] Sightsavers produced a 'failure report' in 2012, DFID has been sharing failures in a blog and the website www.admittingfailure.com from Engineers Without Borders tries to encourage sharing failures in the international NGO sector

Learning exchanges and meetings: As well as learning exchanges described elsewhere in this paper, there are examples of Linking Organisations getting together to share experiences on a specific topic (such as Hepatitis C). Documentation of these is important to ensure learning is captured for others to use.

Multi country programmes: Multi country programmes and activities have been found to be an effective way to promote knowledge sharing and learning between countries; for example harm reduction good practice through the CAHR programme, or the use of SyRex within Link Up. We are also using the ARP as an opportunity to pilot a social network mapping approach which focuses on how people currently connect and share learning.

Secretariat and Alliance Centres as brokers: The Secretariat, particularly the regional teams, (and in future the Alliance Centres) have a key role to play as intermediaries or brokers; they can connect different people and countries together due to the more global overview they are able to have. Proactively playing this role means that those who could benefit from learning or working with each other are introduced and facilitated to work together. The SDP process should help to facilitate this, particularly within the different segments.

Partnerships, advisory groups and coalitions: Alliance organisations connect to many external groups, fora and consortia. These are a key way in which we share our learning with our peers. Different types of partnership for learning include:

- Partnerships for the development of toolkits, online courses or web portals (eg OVC.net, IMA, GNP+)
- Partnerships to build the capacity of staff (eg IMPM, Mango)
- Partnerships for research and evaluation (eg NEF, Population Council and LSHTM)
- Partnerships for policy and advocacy
- Other partnerships are more informal as staff share and learn with their counterparts in other organisations.

Once possible area for future investigation is whether we could develop any partnerships with academic institutions to accredit our online courses.

Online platforms: In a geographically distributed network, online platforms are one of the key ways we are able to share knowledge. Experience suggests that these spaces need constant upkeep; like a garden if they are left untended they become wild and unusable. Therefore a role in managing and governing these platforms, as well as promoting and supporting their use, is essential to learning. The current platforms include:

- The Alliance e-Learning Portal (on the platform Moodle)
- Alliance Webinars (using Adobe Connect)
- Inspire intranet (uses the platform Interact)
- E-forums (currently we are using LSoft, D-groups and Lyris)
- Twitter, Facebook and other social media are also used widely within the Alliance to support communications, advocacy and learning; however these are not covered as part of this strategy

4.3 Horizontal learning: exchanges, job shadowing, study tours, action learning sets

Horizontal learning is a two-way, mutual process: learning *with* someone rather than just learning *from* them. Exchanges, study tours, job shadowing, job swaps and action learning sets[12] allow people to learn with their peers based on their own learning needs. Promoting horizontal learning is a key part of the Alliance's approach and something the Alliance Centres will be leading on for their thematic area. Learning exchanges are in general funded by the Capacity Development Fund or multi country contracts.

4.4 Vertical learning: Task facilitation, face to face training, e-learning, webinars, coaching and mentoring

Vertical learning is a more traditional approach to learning where there is a learner and someone to learn from. Much of the Alliance's formal role in capacity development is through the provision of technical support via TS Hubs, though there are still examples of face to face training or support given from the Secretariat.

Workshops, training and face to face technical support will always be key methods of capacity development. However in a geographically distributed organisation we need to look at other approaches which maybe more cost effective. E-learning courses (already being used successfully with Global Fund consultants) and webinars are areas for future exploration. One benefit of these approaches is that they can be made more widely accessible with little additional cost to external partners, CBOs and other LOs so that more people can benefit from them.

4.5 Skills for learning

Learning and sharing knowledge require individuals to have specific skills and attitudes. Just because you are good at doing something does not mean you can necessarily communicate that knowledge to others. Key skills include:

- Critical and reflective of your own practice
- Humble: experts only remain so if they continue to question their knowledge and learn from others
- Understanding what tools are available for knowledge sharing, and how to use them
- Able to ask good questions[13] and listen
- Inquisitive: able to recognise when you need to search for information
- Facilitating group work
- Writing
- Information management: good at being able to find documents and making them accessible to others
- IT and social media

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[12] Action Learning Sets are structured mechanisms for working in small groups to address complicated issues
[13] There are good questions in this document

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These skills will be particularly crucial for staff in Alliance Centres. Resource people from other LOs also need skills such as presenting webinars, facilitation, talking about their work and sharing their learning with others in a participatory way.

Some of the skills for learning are less tangible, and more related to an organisation's culture. The 2010 PPA Evaluation of the Alliance[14] identified various disincentives to learning within the Alliance including *"an 'activist' culture within the Alliance where the focus is on delivering results and … a perception that asking questions might be penalised."* This is where the role of managers is particularly crucial in supporting and demonstrating supportive learning behaviours.

For the Secretariat, the competency framework can be used as a way of assessing what support staff need to strengthen their skills in relation to knowledge sharing. There are also a number of guidance notes and resources on Inspire on knowledge sharing and learning.

Training in knowledge sharing

Over the past few years we have trained staff from nine LOs[15], as well as hub consultants, on a four day knowledge management course. This course was developed by the Alliance in partnership with IMA International. To date, the course is run as a partnership; in return for Anna facilitating the course, we get 5 free places for LOs and/or consultants. IMA are open to repeating this arrangement for a future course.

However, we have had limited success in following up with the trained LOs to implement a knowledge management strategy in their organisation. The majority of the staff we have trained have left the organisation, or they have been so busy with other things they have been unable to follow up. This calls into question the efficacy of such an approach without wider organisational/management support.

A new area of training/capacity development we are considering is around writing skills; potentially exploring the use of the writeshop methodology to develop skills among LO staff.

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[14] By Roger Drew
[15] KANCO, ACHI, CHAU, ZAN, Alliance India, Rumah Cemara, SCDI, Alliance China, KHANA, MAC and HASAB

5. Outputs and outcomes

There are five main results that we see from our learning activities:

Effective and efficient organisations meeting our good practice and accreditation standards: Firstly, we hope that the learning activities do actually result in stronger organisations.

Knowledge products: There are a wide range of knowledge products that can come from a learning process- if shared and made accessible they can be an input and a way of learning for someone else in the future, as well as a place where organisational memory is stored. It would be useful to think if there are changes we can make in the design of some of the learning activities so that we also get a knowledge product from the process. For example adding on an extra day of work for a consultant who has carried out some TA to write up the process.

> Effective & efficient organisations and quality programmes
>
> Knowledge products Accessed through Inspire, websites, regional portals
>
> Resource people
>
> Alliance Centres
>
> TS providers

Possible products include:

- Documented processes and lessons learnt
- Templates
- Syntheses of learning
- Webinar recording
- Videos
- Case studies
- Evaluations
- Policy briefs or other advocacy products
- Toolkits and guides
- Blogs
- Courses (online or face to face)

Resource people: Another result is staff in LOs who have new skills and knowledge. They can then become resource people for the Alliance: that might mean hosting exchanges; being a mentor; inputting into communities of practice; and blogging. They also have a role actively sharing their learning externally within their country or beyond.

An activity will not automatically produce resource people and it is important to think about how they can be involved in the process and consciously learn from it. This might involve shadowing a consultant, or taking part in training as part of a wider process.

Alliance Centres: LOs who are particularly strong in their learning and subject expertise may become an Alliance Centre. They will then have a key role in connecting LOs and other organisations to identify and share their experiences and lessons. Among other knowledge sharing roles they might offer a help desk function and/or serve as a 'knowledge sign-post'; connecting organisations that need advice to groups with similar experience.

TS providers: If a resource person in an LO is particularly competent and experienced they could become a consultant for one of the TS hubs. This would also require them to have the time and freedom to do consultancy within their current role, as well as the many softer skills required in being a good consultant.

The outputs above all now become inputs to future capacity development and learning mechanisms across the Alliance.

6. Assessing change

The mid-term review of the PPA by Coffey concluded that the range of learning mechanisms the Alliance integrates into its work is not being sufficiently measured. Therefore monitoring the learning activities relating to this strategy is important.

- Measure changes in capacity of organisations (6 months after the learning activity)
- M&E of capacity development process: what works?

The aim of our learning strategy is to improve the quality, relevance and efficiency of the Alliance's work, strengthen leadership in the sector, and contribute to the evidence base for advocacy. Therefore evaluating the learning strategy should look at what contribution the activities have made to meeting that aim.

However, capacity changes and learning are difficult. Pathways between knowledge sharing, learning, capacity development, and behavioural change are notoriously complex. There is rarely a direct line between a learning activity and change in an organisation. Our experience of evaluating the TAF[16] and the HLE[17] show that often it's hard for individuals to be able to identify exactly how one input changed the way they work, as it's always a combination of influences.

There are two main approaches:

Tracking back from the learning activity: The first mechanisms for assessing change is to follow up several months after a learning activity has been completed to find out whether the activity met its aims, and whether there were any unexpected outcomes. Evidence of intermediate outcomes would be sought which demonstrate what difference the learning activity has made to the organisation, and if at all possible those they work for.

Tracking the SDP: For learning within LOs changes should be tracked through the SDPs. Each SDP sets out the development objectives for the LO. Progress is reviewed regularly in discussion with the LO. The accreditation self-assessment is a key input for this. The extent to which learning objectives and standards have been met would be the main indicators. Further exploration could look at what inputs contributed to that change. The theory is that the learning activities would feature as a contributor. This approach would also give us a better understanding of the different influences on organisational change.

With this kind of information we could also begin to understand which different learning mechanisms are more effective in which circumstances, and what the barriers to change are.

Finally, as an Alliance we need to be able to report to DFID in the annual PPA report. If we are tracking SDPs and the Capacity Development Fund in the way outlined above, and if we are explicitly tracking our learning through each strategic intervention, we should be in a better position to give evidence of systematic learning.

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[16] Technical Assistance Fund
[17] Horizontal Learning Exchange

7. Actions

Actions starred ***** are those SMT are requested to support proactively.

For who?	Action	Who
Identifying learning needs		
LOs	Review and update the SDP process, then provide support to regional teams to further promote horizontal learning between LOs (2014)	HODL team with regional teams
LOs	Pilot a social network analysis as part of the Africa Regional Programme (2014)	Anna & Positive Vibes
Seeking new learning		
All Alliance	Producing a regular summary of new content, blogs etc on Inspire as an email to draw people to the site (a newer version of Monday Mail) (2015)	Antonella
Secretariat	Make changes to BookaTrip to make more prominent previous trip reports when booking travel (2015)	Anna with Admin
Secretariat	Raise awareness of Secretariat staff conducting systematic reviews and make better use of evidence (2014)	Andy G with Anna D & Kate I
Applying the action learning cycle		
Secretariat	***** Applying the action learning cycle to our strategic interventions and key contracts, including developing a set of learning questions (2015)	Anna, Guy, intervention leads
Writing it down		
All Alliance	***** Review ToRs for consultants contracted through the Capacity Development Fund to identify potential knowledge products that could be generated through their assignment and shared back with the rest of the Alliance (2015)	HODL team
All Alliance	***** Bring together a range of people (Policy, Programme Impact, Communications) to identify the barriers to documenting our learning, and identify possible responses (2014)	Anna
All Alliance	Work with Africa Delivers to document our learning around sex work	Robert with Anna and others
Research, monitoring and evaluation		
Secretariat	Put in place a system (for Secretariat-funded evaluations and reviews) to follow up on recommendations made in evaluations to find out what changes have been made as a result[18]. (2015)	Ethel & Anna
Connecting people		
LOs	Annually review accreditation reports as part of SDP process to identify the strengths in an LO and connect other LOs (2015)	Anna, Monica & regional advisors

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[18] This process was recommended by ICAI's review of how DFID learns.

For who?	Action	Who
All Alliance	* Ensure active management, governance, promotion and use of Inspire, Moodle, Adobe Connect and e-forums (ongoing)	Antonella, Anna, Todd, IT
Horizontal learning		
LOs	Continue to support learning exchanges through the Capacity Development Fund but broaden the definition to explore other models (such as study tours) (ongoing)	Anna & Ces
Secretariat	Action Learning Sets (2014/15)	Lola
Vertical learning		
All Alliance	* Develop an online induction into the Alliance- particularly its values- for Hub Consultants, new LO staff and Secretariat staff. (2014/15)	Anna & Ces
Learning to learn		
Alliance Centres	Review Alliance Centre business plans and provide support to develop knowledge sharing capacity where required (2014-15)	Anna
Secretariat	Run a half-day session on knowledge sharing and learning for the Secretariat as part of the People Deliver intervention (2015)	Anna
Secretariat	Future plans to train staff to facilitate Action Learning Sets as part of People Deliver (2015)	Lola / Jayne
Sharing our learning		
Secretariat	* Hold a half day 'fail fair' in the Secretariat to start the conversation about failure- as part People Deliver (2015)	Anna
Assessing change		
All Alliance	Review how SDPs are monitored on a quarterly basis and set up a monitoring system for the CDF (2014)	HODL

8. Appendix 1: Definitions

Capacity building refers to the process of enhancing an organisation's abilities to perform specific activities, and the systems and processes to support those activities. It helps to build skills so that an organisation or individual can do the activity themselves in the future.

Capacity development: *"The ability of people, organisations and society as a whole to manage their affairs successfully"*[19]. It is the ability to continue to develop necessary skills, behaviours, networks and institutions that enable communities to adapt and self-renew into the future[20].

Knowledge is information that individuals have reflected on, understood, internalised and are able to use.[21] This knowledge might be in the form of skills, expertise, practice know-how and judgement.

Knowledge sharing is the effective exchange of information that is useful to people.

Knowledge management is a systematic approach to generating, sharing and recording knowledge so that it is available to others when they need it, in formats that are useful and relevant. Knowledge management can be a misleading term as knowledge resides in people's heads and 'managing' or 'transferring' it is not really possible. However, *"If by 'manage' we mean to care for, grow, steward, make more useful, then the term knowledge management is rather apt"*[22]. 'Second generation' knowledge management strategies recognise this and focus more on 'double loop learning'; aimed at increasing an organisation's ability to think creatively and act innovatively[23].

Learning is a developmental process that integrates thinking and doing. It provides a link between the past and the future, requiring us to look for meaning in our actions and giving purpose to our thoughts.[24]

Individual learning: How staff members themselves gain knowledge and know-how over time[25].

Organisational learning is the ability of an organisation to reflect on its own and others' knowledge to inform and change what it does over time.

Organisation development is a planned process of change. It is a systematic organisation-wide process to implement change to increase effectiveness and viability. The initiative for OD comes from within the organisation. This means that management is aware that a problem exists and has decided to seek help in solving it. OD interventions focus on the total culture and processes of the organisation.

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[19] OECD-DAC quoted in http://www.itad.com/capacity-development-how-should-we-reframe-it-for-the-digital-age/

[20] http://www.itad.com/capacity-development-how-should-we-reframe-it-for-the-digital-age/

[21] Britton (2005) http://www.intrac.org/data/files/resources/804/Praxis-Note-Knowledge-Matters-Final.pdf

[22] Etienne Wenger http://www.nickmilton.com/2013/10/etienne-wenger-on-m-in-km.html

[23] ODI report quoting Argyris, 1992

[24] Britton (2005) http://www.intrac.org/data/files/resources/804/Praxis-Note-Knowledge-Matters-Final.pdf

[25] DFID learning report review

Technical assistance is usually a short term intervention aimed either at doing a job for the recipient or transferring knowledge through the provision of staff, consultants and equipment[26]. The term is widely used by the Global Fund and UNAIDS.[27]

Technical support is a term also used by Global Fund, UNAIDS and others, including the Alliance, to refer to the package of interventions applied over time to achieve organisational development or capacity building.

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[26] From a UNAIDS note on TS and CB (in discussion paper)

[27] The Global Fund defines technical assistance (TA) as knowledge transfer through the provision of human resources (national, regional and international experts and/or consultants) and other resources that might be required to improve strategic planning and implementation of programs, reinforce implementer's management capacity, and/or address specific technical or systems gaps. UNAIDS defines it as a short-term intervention aimed to deliver a specific time-bound output. Several TA interventions delivered over time based on thorough capacity assessment can result in sustained capacity development of individuals and organisations.