FY 2021
ANNUAL REPORT
Policy & Learning Workgroup
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The SID-W Policy & Learning Workgroup is a group of international development professionals actively engaged in issues related to evidence-based policy making, such as adaptive management, data and analytics, strategic policy and planning, project management, and M&E and learning. With events ranging from how leaders make decisions to how to analyze, document, and apply learning, this workgroup aims to inform and influence the ongoing dialogue regarding the evolving practices of policy development, strategic planning, and program design and implementation.
Dear Members of the Policy & Learning Workgroup,

We are happy to report that we had another productive year, with programming that was entirely virtual! As we reflect on the past year, the Workgroup produced several great events, such as How Decisions Get Made: Leverage Learning for Influencing Policy & Programs, Lessons Unlearned: Peer Assist to Match the Supply and Demand of Learning, and Collective Learning and Networks as well as a planning meeting. We are currently working on a new and exciting slate of events for FY 2022, so stayed tuned for more information!

After 5 years with our team, Paul Sherman, our Director of Programs, will be stepping down from his role to pursue graduate studies. Paul is still involved with SID-Washington as a Consultant. Thank you, Paul, for your effort and commitment to the Workgroups and their programming!

Stepping into Paul’s role, we would like to welcome Malavika Randive as our new Program Coordinator. Malavika will be working closely with our Co-Chairs in planning events for the Workgroup.

Thank you for your continued interest and support of the Workgroups. We hope to see you at future SID-Washington events! If you have any questions or suggestions, please feel free to send an email to events@sidw.org.

Best regards,

Katherine Raphaelson

Malavika Randive
Emily Janoch is the Director for Knowledge Management and Learning for CARE USA focusing on ways to better learn from and share implementation experiences on eradicating poverty through empowering women and girls in order to improve impact. She is an expert in designing systems to capture and share information across many sources. With four years of on-the-ground experience in West Africa and academic publications on community engagement and the human element in food security in Africa, she is especially interested in community-led development. Her work focuses on making sure that communities can engage in their own development for sustainable, appropriate results. She is fluent in French and Dogon, and has experience in food security, nutrition, health, governance, and gender programming. Her work on holding NGOs accountable to community needs and creating local capacity has been presented at Harvard, Imperial College London, and USAID seminars on USAID Forward. She has a BA in International Studies from the University of Chicago, and a Masters’ in Public Policy in Internationals and Global Affairs from the Harvard Kennedy School.

Lane Pollack is a Senior Learning Advisor with USAID’s Bureau for Policy, Planning and Learning (PPL). She serves on the Collaborating, Learning and Adapting (CLA) team in the Office of Learning, Evaluation and Research (LER). In this role, she provides direct Mission support and collaborates with regional and technical bureaus to help teams integrate CLA practices into their programming and operations. Lane contributes to PPL-led as well as other technical trainings, resources and engagements to advance CLA across the Agency and engages with US-based partner institutions to share and learn from Agency-wide approaches and the broader development community in areas related to organizational learning and Monitoring, Evaluation and Learning (MEL).

Through previous positions in NGO’s and consulting, Lane brings experience designing, implementing, monitoring and evaluating USAID (and other) funded programs focusing on private sector development, as well as hands-on experience in corporate training, project management and business administration. She holds MBA degrees from the University of Texas and Pontificia Universidad de Católica in Santiago, Chile.
Thursday, July 23, 2020
1:00 PM - 2:00 PM ET | Online via Zoom
How Decisions Get Made: Leverage Learning for Influencing Policy & Programs

Thursday, October 22, 2020
1:00 PM - 2:30 PM ET | Online via Zoom
Lessons Unlearned: Peer Assist to Match the Supply and Demand of Learning

Wednesday, February 17, 2021
1:00 PM - 2:00 PM ET | Online via Zoom
Collective Learning and Networks
How Decisions Get Made: Leverage Learning for Influencing Policy and Programs

Moderator: **Jacob Grover**, Senior Policy Advisor, Millennium Challenge Corporation (MCC)

Speakers: **Sheba Crocker**, Vice President for Humanitarian Policy and Practice, CARE USA  
**Nancy Lee**, Senior Policy Fellow, Center for Global Development  
**Wade Warren**, Chief Strategy Officer for International Development, Deloitte Consulting

**Event Description:** Have you ever wondered if your meticulously crafted knowledge product that you had to fight to get in front of a senior leader at your organization actually gets read? Sadly, the answer it probably no – either because it was too long, too technical, or they were just too busy to read it. So, how do senior leaders absorb and use information to make the decisions that shape development policy and programs?

Join us for a discussion with three senior leaders with decades of collective experience to explore how best to get their attention and convey information. Get a better understanding of how leadership processes information so that organizations can be more effective at providing the right information at the right time to get to the best decision possible. At the end of panel, you’ll walk away with tangible ideas of how to develop more timely and usable knowledge products that will make a difference in applying knowledge, evidence, and organizational learning to critical decisions at your organization.

**Key Takeaways:**

1) **Comparing and Contrasting Decision-Making Culture**

Moderator Jake Grover (MCC) initiated this discussion by asking the panelists to compare and contrast the various decision-making cultures they experienced throughout their careers. Sheba Crocker (CARE USA) outlined the difference between her experiences in the Department of State and United Nations versus the NGO world. Ms. Crocker explained that NGOs often face relatively low stakes decisions with high resource constraints. Additionally, points of entry for decision-making are not always clear. In contrast, the State Department and UN often face high stake situations but have a clear procedural roadmap to effectively make them. Wade Warren (Deloitte) discussed how consensus-based decision-making culture can be sub-optimal. However, in moving to Deloitte, Mr. Warren found a decision-making culture that was rigorous and well-defined. Mr. Warren also highlighted that within the various governmental organizations, there is a range in decision-making infrastructure. Nancy Lee (Center for Global Development) broke down decision-making into three different styles: (1) process and mission driven, which is often quite organized and effective; (2) leadership driven (inclusive) – which can allow for collaboration and creativity within the organization; (3) leadership driven (opaque) – a style that quickly leads to a negative organizational culture.

2) **Leadership and Culture**

Ms. Lee emphasized the importance of leadership within an organization. The organization can become trapped in its own orthodoxy, and it is crucial for a leader to be able to think in creative, unconventional ways. Ms. Crocker mentioned there are often well-established hierarchies that inform how decisions are made. To that end, when a new leader comes to an agency or organization, the role of surrounding senior staff can gauge how inclusive or exclusive the leadership will be. Mr. Warren moved in a different direction, as he explained that data is not always available for decision-making, which can create a good struggle for the organization to produce the data the leader needs.

3) **Processes, Systems, and Effective Knowledge Management**

Ms. Crocker noted senior level officials at the Department of State may face difficulties directly engaging with the think tank and academic world – or even extensive, internal policy reports. However, through osmosis, these recommendations and ideas are able to circulate throughout the staff. Mr. Warren further commented that senior leaders need to depend on staff. He also discussed developments to create effective data bases to house information. However, as these databases become more complex, mining for specific pieces of information becomes increasingly more difficult.
Machine learning and artificial intelligence will make this process more efficient. Building on Mr. Warren’s comments regarding information storing, Ms. Lee mentioned the importance for all projects to have comprehensive sections of relevant past evidence. She additionally stressed the importance of training those in early stages of their career on how to brief senior officials – a crucial skill that can help facilitate decision-making processes.

4) Evaluating Knowledge Products

Mr. Warren mentioned Deloitte gravitates towards PowerPoint and emphasized how a well-constructed graphic can both greatly enhance a knowledge product and help others understand it. Ms. Crocker – rather than focusing exclusively on the slide deck mentality – highlighted the importance of being able to write succinctly and compellingly. Further, she discussed the need for organizations to create a culture that can admit to failure and allow staff to speak out against policies that may not be effective. Ms. Lee further emphasized that knowledge should be collected at all stages of a project. In terms of a knowledge product Ms. Lee found particularly useful, she discussed MCC’s Principles into Practice: documents of about 15-20 pages, where people gather and evaluate knowledge for a given sector.
LESSONS UNLEARNED: PEER ASSIST TO MATCH THE SUPPLY AND DEMAND OF LEARNING

Speakers:

- Zachary Baquet, Senior Knowledge Management Advisor, Bureau for Resilience & Food Security, USAID
- Barbara Fillip, Senior Advisor for Knowledge Management, Chemonics International
- Ingrid Orvedal, Senior Learning Advisor, RTI International

Event Description: We’ve all seen (and written!) them, the “lessons learned” section of a document that says something like, “Lesson 1: Sustainability Matters. The project should make efforts to build in sustainability thinking from the beginning of im- ple-mentation.” It’s not wrong, but it’s not helpful either. How can we articulate our hard-won learning in ways that let ourselves and others apply them when the time comes? As we make decisions, we’ve all repeated a failure someone else knew would not work because we could not find the information that gave us a better option. What kinds of “just in time learning,” behavior change techniques, and habits can we build to make sure learning reaches the people who make decisions in time to influence the conver- sation and have an impact? What’s getting in our way, and how can we overcome the challenges? Participants worked in peer-assist exercises, helping others in the space brainstorm solutions to challenges they are currently grappling with.

Key Takeaways:

1) Introduction

Barbara Fillip (Chemonics International) began with an introduction focused on the connection between knowledge (the capacity for effective action) and learning (the process of acquiring new knowledge or modifying existing knowledge). By using active and dynamic words, knowledge will no longer be static, and instead encompass knowledge bases, experience, and networks. Organizations should focus on the entirety of the learning process instead of fixating on one aspect. Specific lessons learned processes within knowledge management can inspire learning throughout an organization. Following Fillip’s presentation, participants joined breakout rooms to discuss three key topics:

1. Ensuring global learning frameworks are still relevant and realistic for individual country-level activities and projects
2. How to capture and apply lessons learned at the organization level
3. Project-to-project knowledge sharing

2) Breakout Room 1: Ensuring global learning frameworks are still relevant and realistic for individual country-level activities and projects

Ingrid Orvedal (RTI International) used a global public health program implemented in 13 countries to demonstrate the positives and negatives of learning frameworks.

The program was broken down into three phases, including (1) identify/collect, (2) shape/document, and (3) share/use. Orvedal focused on how the third phase of the program motivates individuals to crowdsource lessons. Orvedal also identified a few challenges, including:

- Making the framework relevant for each of the thirteen countries
- Having the staff understand the importance of the learning program and including information learned from other teams
- Embedding the large number of processes into the larger learning network

Participant Peter Hobby contributed the idea of simplifying tasks instead of focusing entirely on the big picture. Participant Martin Kasongo suggested creating a learning framework with smaller digestible lessons throughout the entire project in lieu of one recap at the end. The conversation then centered around how effective mining workplace digital conversations are for establishing an organization’s information flow. The participants discussed the merits of workplace conversation tools such as Yammer, WhatsApp, and Microsoft Teams and how they can facilitate a workplace learning culture.

3) Breakout Room 2: How to capture and apply lessons learned at the organization level

Zachary Baquet (USAID) started his breakout session outlining the challenges of organizational-level learning, including sharing and accessing lessons learned while applying the contextual and activity-specific ones more broadly.
The first step is to collect these learned lessons at an organizational level and integrate them into the monitoring cycle so that learning occurs based on data, inputs, feedback from human interaction, etc. The key to effective learning agendas is ensuring that they reflect the group’s understanding, provide examples to help employees retain lessons that cater to their needs, and contain points from which the entire organization can learn. Once these lessons are formed, information exchanges happen between employees both informally through conversational exchanges and formally through learning databases. Another approach to this method is interviewing the staff and identifying key challenges.

4) Breakout Room 3: Project-to-project knowledge sharing

Drawing from her current work experiences, Fillip explained two real-life scenarios – field office efforts in Georgia and the Philippines – to demonstrate the importance of project-to-project knowledge sharing. It is advantageous for these projects to share knowledge, as they are quite similar in areas such as using similar digital platforms to facilitate e-commerce.

However, these projects face different challenges due to their current phases (Georgia in its fourth year, and Philippines in its first year) and their ability to adapt to COVID-19. Instead of a mutual knowledge exchange, a two-way flow of information turned into staff from Georgia primarily sharing their experiences with their counterparts in the Philippines. Currently, the staff members at each location are trying to find efficient ways to connect with each other. They have discovered that ad-hoc meetings do not suffice. However, issues around technology and COVID-19 are stifling efforts. This has affected building networks and connections, as this responsibility primarily has fallen on the field staff with home office support.
Collective Learning and Networks

Moderator:  **Lane Pollack**, Senior Learning Advisor, Bureau for Policy, Planning, & Learning (PPL), USAID

Speakers:  **Michael Lennon**, Senior Fellow, Center for Excellence in Public Leadership (CEPL), GWU  
**Rakiétou Hassane Mossi**, Regional Communication and Support Officer, CARE  
**Kerstin Tebbe**, Founder, Collective Mind

**Event Description:** How can we promote more inclusive learning by harnessing the power of diverse networks? What are some tools and structures to use that make it easier and more effective for people to learn and apply their learning to their work? The Policy & Learning Workgroup explored those questions through a combination of quick presentations on collective learning and practical exercises on networked learning with participants in small groups. Rakiétou Hassane Mossi, Michael Lennon, and Kerstin Tebbe hosted conversations about making the most of our collective intelligence for learning.

**Key Takeaways:**

1) **Design: Design for Self-Organizing Collective Intelligence**

Michael Lennon (The George Washington University) led a breakout group on system mapping for collaborative projects and explored collective intelligence in formal institutions, such as the World Bank. Lennon made an analogy of CI with dark matter. CI is a new foundational variable that has recently been identified. On top of the traditional variables, markets, governments, and hierarchies, he noted the emerging algorithmic intelligence in human collective systems. During this breakout group, the following points also emerged:

- CI affects our ability to design effectively for collective impact
- Two-Step Analysis of CI Design:
  - Identify stakeholders
  - Explore dimensions of self-organizing networks
  - Influencer mapping is a new indicator for social influence
  - Understanding who the key players are and how they are connected to each other is key to success in collaborative projects

2) **Youth: Youth exchange from West Africa and Austria**

Rakiétou Hassane Mossi (CARE) presented the value of CARE’s youth work as a strong example of youth engagement in collective learning. By involving the youth perspective, CARE receives huge return-on-investment in reducing the risks of poor management and costs associated with staff turnover.

Developing the next generation of CARE staff members with youth at the core requires hiring practices to include young people. Relevant project targets are created to build meaningful and mutually-constructive partnerships with local youth-led organizations, groups, and movements. During this breakout group, the following points also emerged:

- Focus on incorporating and leveraging technology in creating innovative youth programs, especially in entrepreneurship
- Build leadership capacity of young staff through training, mentorship, technical skills development, and opportunities
- Maintain youth presence and voice in planning and decision-making spaces

Mossi noted the current focus of CARE’s youth work is to coordinate a youth exchange program between West African countries and Austria.

3) **Collective: How to design and use networks for collective learning**

Kerstin Tebbe (Collective Mind) highlighted the importance of networks in effective collective learning. She noted the richness of a network determines the diversity and power of conversations to meet goals. Tebbe elaborated that collective learning should be a tool to achieve a mutual goal and to continue exploring what else collective power can achieve. Participants discussed useful platforms, including Padlet, Miro, Mentimeter, Mural, and Zoom Whiteboard. During this breakout group, the following points also emerged:

- A network should serve the basic functions of information sharing, thought leadership, field building, knowledge management, and learning and capacity building.
- Organizations can connect members by focusing on the bigger picture of the collective value in a network.
- Using multiple channels will help ensure meaningful engagements with a network.
We would like to thank Membership and External Affairs Manager Pebbles Daiez and Program Associates: Jilly Choi, Elijah Enis, Valentina Koudelkova, Ian Boldiston, Cairo Lawrence, and Pourobee Saha for their hard work to create this report.