



KDAD LEARNING:

Reflections on Global Learning and Evidence Exchanges (GLEEs)

2018

Feed the Future Knowledge-Driven Agricultural Development Project

Training Portfolio

Reflections on Global Learning and Evidence Exchanges (GLEEs): Lessons Learned Through the KDAD Project

Since its inception in late 2013, KDAD has collaborated with USAID to plan, design and facilitate multi-day learning events known as Global Learning and Evidence Exchanges (GLEEs). These GLEEs homed in on priority topics including Scaling, Climate-Smart Agriculture and Market Systems. These events convened over 450 USG/USAID technical staff, outside technical experts, implementing partners and host country government staff, among other stakeholders.

These learning events sought to:

- **Share information** about effective approaches, lessons learned and plans for ongoing and future studies related to the **Feed the Future Learning Agenda** themes.
- **Get input and gain consensus** on effective approaches recommended by USAID and others; and increase the application of these approaches in program implementation, monitoring and evaluation.
- **Improve networking and communication** among practitioners within and across food security sub-sectors.
- **Increase awareness** of, and participation in, the implementation of the Feed the Future Learning Agenda and **identify gaps** in Learning Agenda themes and questions.

The GLEEs were designed to emphasize peer-to-peer knowledge sharing and promote evidence exchange. They also provided the opportunity for missions to better understand the support offered by BFS staff in Washington and how to access it, as well as for Washington-based staff to understand the needs of field staff and their real-life successes and challenges in the technical areas discussed.

This document shares key lessons learned and reflections from our experiences collaborating with USAID to plan, design and implement GLEEs over the life of the project.

To GLEE or not to GLEE? That is (part of) the question

Designing, developing and implementing a GLEE requires time and resources that could be effectively invested elsewhere. We estimate that it takes each session lead approximately 60 hours to plan, design and develop a session once the agenda is set. Multiply this by approximately 20 sessions over the course of a 4-day GLEE, and you begin to have a sense of the level of effort to prepare for a GLEE, not including the time that it takes the planning group to set the agenda and the time that all session leads, presenters, participants and the KDAD project team spend during the GLEE event. This is clearly a big investment. However, this type of event can be pivotal to mobilizing collective effort, as was evident for the Scaling GLEE when USAID was faced with a clear challenge: how best to use available resources to scale up and measure impact of Feed the Future programs.

If there is a clear goal that justifies investing in a GLEE, another related question is, when is the best time to do it? We recommend at least four months lead time for planning, design and development. In

addition, GLEE planners should take into account other contextual factors that may influence the timing such as new policies, availability of resources to address issues related to the GLEE, time sensitive goals or challenges, and time sensitive opportunities.

Additionally, planners need to consider what will happen before, during and after the GLEE to support application of learning to contribute to the achievement of desired development results.

Focus on relevant, action-oriented results

Compare the following two sets of prior GLEE objectives. The first is written more in conventional objective language, the second is presented as a set of questions around which to organize GLEE outputs. Which set of objectives, regardless of the form of presentation, articulates more clearly specific actions and outcomes that USAID desires as a result of the GLEE? Which set would be most useful to guide the design and implementation of the GLEE? Why?

Example 1:

- Participants will be better able to promote and increase the use of market-led approaches to achieve GFSS objectives.
- Participants will be able to better design and implement market-based programs in Missions and Washington.
- Participants will share and learn from successes and failures in the field, while improving use of approaches and tools to identify opportunities to catalyze inclusive, agriculture-led economic growth through market-based solutions.

Example 2:

- How do we find the best approach for a specific scaling-up goal and make it happen?
- How can private sector partners be involved in scaling up the adoption and use of agricultural technologies?
- How can progress in scaling up the adoption and use of agricultural technologies best be measured, both to gauge results and to inform actors about what works and what doesn't?

We have observed that when there are many people involved in planning a GLEE there are many diverse opinions, which is great. However, one potential pitfall of trying to embrace everyone's ideas is that the resulting goals or objectives may end up being too broad to provide meaningful focus to the GLEE and may not ultimately result in concrete actions to improve development program results.

A key challenge for GLEE planning is how to ensure that the objectives of the GLEE address both the strategic objectives of the agency as well as the real challenges that field implementers face in trying to meet these objectives in a meaningful, specific and focused way.

To address this challenge, GLEE planning groups, which have generally been DC-based with an occasional member from the field, have tried various approaches to get field input using methods such as

surveys, regional teleconferences and informal conversations. It has been most helpful when field staff are part of the planning team and can provide ongoing input from a field perspective.

Clarify GLEE roles & responsibilities

Planning a GLEE requires thoughtful attention to what needs to be done and who needs to do it as well as how decisions get made and who needs to make them. Table I below presents key GLEE USAID and contractor roles and responsibilities based on our experience. To address the many questions about roles that arise during GLEE planning and to help session leads and presenters understand their roles and what is expected of them, we developed the “Session Lead Roles and Responsibilities” guide and a similar guide for session presenters. We reviewed this guide with the GLEE planning team to ensure that these roles and expectations were clear. Over time, we adjusted this guidance based on changing needs and feedback. It is helpful to review everyone’s understanding of the planning team’s roles and responsibilities, and how the team is working on a regular basis to see if any adjustments are needed.

Table I

USAID Roles & Responsibilities

- **Leadership** (usually director level with ultimate decision-making authority)
- **USAID Activity Lead** for the GLEE who serves as GLEE coordinator
- **Session Leads** take responsibility for ensuring that their sessions are designed, materials are developed, presenters/facilitators are briefed and prepared. One GLEE found it useful to identify Day Leads who coordinated the work of all session leads relating to a particular GLEE theme of the day to ensure that the sessions built on each other, where possible and weren’t duplicative or inconsistent.
- **Session presenters/facilitators** who are responsible for preparing and delivering content and materials for their session

KDAD Roles & Responsibilities

- **Activity Lead** liaises with USAID Activity Lead, coordinates GLEE support team efforts and ensures that coordination systems & processes are effective and efficient. This person may also carry out one of the other functions below (e.g., KM Specialist, Facilitator).
- **KM Specialist** ensures that appropriate content is shared at the right times in the right places in the right ways including making resources accessible to support planning team members, presenters, participants and those who are not able to attend the GLEE but can benefit from it in other ways.
- **Facilitator** collaborates with USAID to design and facilitate the GLEE planning process and provides support to session leads, presenters and session facilitators to design sessions, including selection of appropriate methodology suited to the topic that takes into account the overall methodology used throughout the GLEE. The facilitator also provides feedback to presenters during “dry runs.” During the GLEE, the facilitator advances plenary sessions and transitions between sessions and helps participants process what they are learning throughout the GLEE.
- **Communications Specialist** collaborates with USAID to develop email communications to GLEE participants, create online and print materials, format presentations for consistency and to meet USAID branding guidelines, document the GLEE and post GLEE related content on web platforms (e.g., Agrilinks).

- **Operations Manager** handles the logistics involved including booking venues and coordinating with venue staff on meals and rooms, participant visas, travel and transport, finances, and other tasks.
- **Audiovisual Specialist** manages technology to ensure the GLEE runs smoothly. A videographer may also be called upon before the GLEE to assist with creating videos for sessions and/or at the GLEE to capture proceedings so that they can be shared after the event.
- **Evaluation Specialist** designs evaluation instruments, collects and analyzes data, documents and shares findings and, at times, facilitates GLEE After Action Reviews and ensures that these findings and lessons learned are shared with teams embarking on a new GLEE effort.

Get the right people involved at the right times

Finding the sweet spot of involving the right people at the right times in the GLEE planning process can be challenging. Senior leadership should be involved in determining whether and when a GLEE should happen and in articulating the desired outcomes of the event. Once these decisions have been made, a core planning team should be identified consisting of the GLEE coordinator, session leads, country support/regional representatives, the contractor team and others who will have important roles to play in the GLEE. In our experience, these planning groups often included over 20 members who met on a weekly basis over several months. To optimize people's time, we shifted from having everyone meet for an hour every week to the following schedule:

- Everyone participated in a half-day workshop to develop a draft agenda for the event. Ideally, senior leadership participate in this workshop to weigh in on agenda option decisions. If this is not possible, they should review the draft agenda and revise it if necessary following the workshop.
- Once the agenda is set, the number of participants in the weekly meetings can be reduced to a core group of the GLEE coordinator, Day Leads, the contractor team and regional representatives from headquarters and the field.
- Session Leads met individually every week with the facilitator, KM/comms team and with presenters, as needed, to develop their session designs and materials once the agenda was set.
- Several weeks before the event, the full planning team reunited to review the content of each session to avoid unintended duplication, review session flow, identify any major gaps in addressing a theme and make presenters aware of opportunities for them to reinforce learning from other sessions.
- We found it helpful for the contractor Activity Lead and facilitator to meet with the GLEE coordinator every week before the weekly planning meetings to track progress, identify any issues and plan the agenda for the upcoming planning group meeting. It was also helpful to meet briefly with the GLEE coordinator immediately following the planning group meetings to coordinate next steps.

Overcome the temptation to overfill the agenda

It is tempting to load an agenda with many interesting sessions to take advantage of the opportunity of bringing everyone together. There are at least three good reasons to resist this temptation. First, too much content will result in cognitive overload that compromises participants' ability to remember what they learned. Second, participants need time to process and plan for how they will apply what they are learning at work. We recommend that agendas include at least 30 minutes in the morning to set the context for the day's agenda and to process the prior day's work as well as 30 minutes at the end of the day to help participants reflect on and share how they will apply what they learned that day in their work. Third, GLEEs and other large events offer the opportunity for participants to connect with each other informally to strengthen relationships and share their experience. Agendas that cut break times down to 15 minutes or less so that there can be more time for formal sessions don't provide sufficient opportunity for these important informal connections and knowledge sharing.

So, how do you prioritize agenda sessions and content? The planning group should consider the GLEE objectives and desired programmatic outcomes as well as input from the field about the key challenges and opportunities they face in trying to achieve these desired outcomes. Taking these things into account, what are the key questions this GLEE is trying to answer, that, if answered, would have the greatest impact on improving Feed the Future development results?

Provide user-friendly accessible tools, systems and processes to support session design, development and delivery

To make the planning, design and development process easier for all concerned, we developed an extensive set of tools, templates, trackers, guidance and resources that could all be accessed in a "one stop shop" folder in a Google drive. To avoid last minute work on session designs and materials that often result in poorer quality, we broke down the session design process into smaller steps with deadlines that were spaced out over several weeks. In addition to providing all team members an overall schedule of these steps and their deadlines, we also included a list of upcoming deadlines in each weekly planning meeting agenda to remind Day Leads and, by extension, Session Leads about the steps they needed to complete that week. KDAD provided ongoing support to most Session Leads so that they could complete these steps in a timely way.

Methodology matters

Over the course of the various GLEEs that we have supported, we have experimented with a variety of session methods and approaches, including and beyond the most common methods of lectures/presentations and panels. According to GLEE evaluations, participants have consistently preferred the more interactive methods that provide opportunities for them to talk to each other including small group discussions at their tables, world café rotating discussions, gallery walks, "bus stops" or other types of learning stations. Short lightning talks followed by group discussion, TED-type talks and use of video, storytelling, games and open forums which start as a panel and then invite participants to join have proven to be effective methods when used appropriately. To process each day's

learning, we used “exit tickets” to stimulate reflection accompanied by a variety of fun activities such as daily news headlines, key take-away tweets and creative group expression of key take-aways through a song, poem or skit. The selection of an appropriate session method depends on many factors such as the knowledge sharing and learning objectives of the session, the overall macro GLEE goals and objectives, the mix of methods used throughout the GLEE, culture and preferences of the participants, presenter knowledge and skills, and other factors. Regardless of the method used, cognitive learning principles and recommended practices should be applied when designing the session and session materials. It is important to have members with technical knowledge and experience in instructional design, knowledge sharing, facilitation, adult learning and graphic design that supports learning on the GLEE team who can support Session Leads in developing effective session designs and materials.

Make time for dry run practice sessions

The best way to ensure that sessions run smoothly is to have the Session Lead and presenters do a dry run practice that allows them to work out their roles, transitions, adjust timing, make other necessary changes together and discuss any logistic and/or audiovisual support needed. If possible, schedule enough time to convene all presenters of sessions that relate to each other (this may be all sessions occurring on the same day or that are in the same thematic track) so that they can observe each session’s practice round to note connections to their own sessions.

Supporting learning on field trips

Field trips can be great opportunities for learning about how strategies and approaches that have been shared during the GLEE are implemented in the field if the field visits are carefully aligned with the GLEE objectives. As mentioned above in developing the GLEE agenda, it is tempting to overschedule field visits to different sites. We recommend resisting this temptation in favor of spending more quality time on fewer places that provide opportunities for more in-depth learning. This would allow time for discussion about what participants observe and whether/how this approach could be applied as is or modified to fit their own country settings. To support this reflection process, we recommend that a facilitator equipped with a facilitation guide of key questions and appropriate methodology accompany each group.

For a summary of these lessons learned as well as some additional tips, see Table 2.

Table 2

Tips for a Successful GLEE

Learning from the GLEEs has taken many forms, from participant and organizational learning, to KDAD’s own lessons on what makes for a successful learning event, summarized as follows:

- **Determine when a GLEE is an appropriate approach** to achieve USAID/BFS objectives.
- **Clearly define learning objectives** and outline what needs to be achieved through the event, who should benefit and why now.
- **Clearly define, assign and communicate roles** and responsibilities, both internally and with planning committees.

- **Establish** and communicate deadlines as early as possible and agree to stick to them.
- **Start with the end goal in mind:** What change do you want to see following the GLEE? What does success look like? How will participants apply what they learned? It's helpful to also think about what the GLEE will *not* address or achieve.
- **Allot time for exchange:** Allow ample time for exchange and peer-to-peer learning, including unstructured time for follow-up discussions, collaboration and networking.
- **Provide time and structure for reflection:** Participants need time to absorb and process the information they are taking in. Trying to cram every minute full of information creates cognitive overload that is counterproductive.
- **Engage with mission staff:** Identify potential presenters and resource staff early on and make sure they are included throughout the planning process.
- **Ensure diversity of participants and presenters:** Discourage “manels” and use of the same presenter for multiple sessions. Make sure participants represent the breadth of the community.
- **Know your audience:** Make sure the session content addresses different perspectives, experience and knowledge levels.
- **Define basic concepts** and avoid making assumptions about participants' level of understanding. Perspectives, experience and skills will vary across participants.
- **Embed follow-up** into planning. For learning to stick, follow-up support materials and reminders are critical. “Exit tickets” can help home in on areas where participants need most support.