2018 CLA CASE COMPETITION

COLLABORATE • LEARN • ADAPT

Case Title:

Innovative Exercise to Integrate Social and Behavior Change Methods

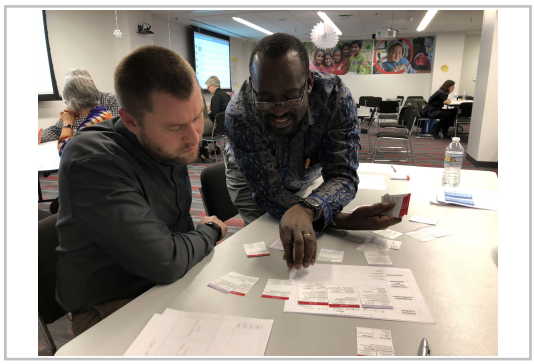

Photo Caption: Breakthrough ACTION staff Mike Toso (Johns Hopkins Center for Communication Programs) and Télesphore Kaboré (Save the Children) examine methods cards during an integration exercise. Credit: Jarret Cassaniti, 2017.

Name: Jarret Cassaniti

Organization: Breakthrough ACTION

Summary:

Breakthrough ACTION is the U.S. Agency for International Development's (USAID) flagship social and behavior change project led by Johns Hopkins Center for Communication Programs. Breakthrough ACTION is supported by four principal partners, each with a unique skill set: ThinkAction (human-centered design), ideas42 (behavioral economics), Save the Children (community mobilization), and Camber Collective (audience segmentation). The Breakthrough ACTION Insights Team developed ideas for integrating programmatic methods to enable the project to respond to intractable health problems. One such method was compiling the different methodological approaches used by each partner in an inventory tool and developing a methods integration card game based on that inventory. The ideas resulting from this exercise were then used to propose health and methods integration in response to USAID Mission scopes of work.

There were two limiting factors to the team's ability to propose methods integrations: the ability to orient all participants sufficiently and equally with regards to the activity's purpose, and the mandate and funding to use the ideas in future work plans. Nevertheless, this approach allowed for open and transparent sharing of methodologies and approaches across the partnership. It provided a platform for organizations to discuss the details of their work and co-create potential new approaches to leverage each other's strengths. It also allowed the project to build a knowledge base of potential ideas that could be applied in future opportunities.

1. Which subcomponents of the Collaborating, Learning and Adapting Framework are reflected *most* in your case (select up to 5 subcomponents)?

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

2. 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?

The Breakthrough ACTION project objectives are to increase the practice of priority health behaviors and enable social norms for improved health and development outcomes, with an emphasis on FP/RH, HIV, Zika, MNCH, and malaria. This will be achieved by proposing strategies that harness proven social and behavior change methodologies in programs implemented worldwide. The challenge faced by Breakthrough ACTION was to propose a selection of social and behavior change methodologies. The project needed to define the sequence of the methodologies; identify which methodologies were most pertinent to the health challenges; and determine the multiplier effect of a purposeful integration of the methods.

The five-year project kicked off in July 2017 with a partners meeting, during which participants were introduced to each others' methodologies. It became clear that "deeper dives" would be needed to fully internalize the rich and diverse approaches available through the partnership to identify how they could be most effectively integrated.

The project Insights Team developed ideas for methods integration to enable Breakthrough ACTION to respond to intractable health problems. One such method was compiling the methodological approaches used by each partner in an inventory tool, and developing a methods integration card game/exercise based on that inventory.

The resulting ideas were then used to propose work plans in response to USAID Mission scopes of work.

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

Collaborating, Learning, and Adapting (CLA) approaches to development include collaborating intentionally with stakeholders to share knowledge and reduce duplication of effort; learning systematically by drawing on evidence from a variety of sources and taking time to reflect on implementation; and applying learning by adapting intentionally. This approach seemed well suited to the project's objectives and desire to share and apply learning across partners, and integrate our approaches and methodologies in an organized and effective way while at the same time strengthening the partnership.

Explanation of the CLA Maturity Matrix through "playing cards" provided an interesting example of how these discussions could be facilitated more effectively. The general principle of thinking holistically while keeping the exercise simple resonated strongly. Breakthrough ACTION adapted the approach to suit the specific needs and project context. The cards developed by the project provided a simple way to visualize all of the potential building blocks of an integrated approach, and the templates allowed the team to stay grounded and structured during brainstorming. By putting together combinations of the cards, staff would have common ground for discussing potential solutions to the most important problems the project seeks to solve.

4. 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.

The first step in the process was for each partner to develop a detailed description of their own processes and methodologies. This was accomplished by: 1) developing the Breakthrough ACTION Methodology Matrix (BAMM) tool; and 2) presenting partner-led “Ted Talks” on their organizations' approaches.

The BAMM tool was an Excel file that used separate tabs for each stage in the overall project's methodology: Shared Vision, Problem Definition, Problem Diagnosis, Design, Implement, and Monitor. Activity descriptions for the various approaches used by partners were added to each tab.

The tool also included an overview that explained the different stages, the purpose of the tool, and how it was intended to be used. Another tab was set aside for a glossary of terms used by each partner.

Partners were instructed to list the following on each tab: 1) the activities they typically conducted during each stage; 2) a description of their activities; 3) the purpose of their activities; 4) the inputs/resources required; 5) the expected outputs/outcomes; 6) the indicators for success; and 7) initial ideas for collaborating with other partners. Each organization filled out the BAMM tool separately and the responses were then compiled into one version. Since this version of the BAMM was unwieldy, the team determined that a more user-friendly approach was required so staff could compare and explore the activities and methods.

The BAMM tool was the genesis of the methods integration card game, which was described as a “Garanimals-style poker game.” Essentially, each activity line in the Excel file became one card for each organization. Each partner, therefore, came to the game with a color-coded deck of cards representing the different activities they typically conduct.

The card game/exercise was conducted during an all-team "Deep Dive" meeting in Washington, DC in December 2017. Leading up to the exercise, participants presented their organizations via a "Ted Talk" and opened up a general discussion regarding their methodologies and approaches.

The card game itself was a brainstorming exercise that partnered different organizations together and engaged them in a structured discussion on integrating elements of their approaches to solve a specific problem in a Breakthrough ACTION country. Where scopes of work were available, they were used to determine opportunities for integration. Nigeria, Cote d’Ivoire, and Zambia were specifically used to stimulate card play and discussion.

A board game template allowed partners to “play their cards” against a defined problem.

The partners were grouped in pairs of two, and given 15 minutes to fill out as many templates as possible. This allowed them to generate as many "valuable card combinations" as they could in the time given. There was also a space in the template to describe the integrated approach. After 15 minutes, the partner groups switched. This continued until every possible organizational pairing was completed.

After the templates were filled out, the partners spent time evaluating the ideas based upon a set of agreed upon criteria, which included: the extent to which the integration proposed leveraged the strengths of the participating organizations, the level of integration/disruption (e.g., accommodating to transdisciplinary), feasibility, and level of risk (e.g., unanticipated complications and the project’s ability to generate evidence on the value of this integration). The ideas with the highest scores were then further refined and incorporated into Breakthrough ACTION work plans.

5. 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?

First and foremost, the exercise allowed for open and transparent sharing of methodologies and approaches across organizations. The card game also provided a platform for partners to discuss the details of their work and co-create potential new approaches to leverage each other's strengths. This information sharing is valuable as Breakthrough ACTION thinks through work plans and builds a common understanding of each partner's areas of expertise.

The exercise also allowed Breakthrough ACTION to build a knowledge base of potential ideas that could be applied to future opportunities. Even if current budgets and scopes of work do not allow the project to implement all of the ideas generated or those that are more complex, the team can return to the database of ideas when future opportunities arise.

6. 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?

The overall approach helped participants better understand each partner's approaches and engage in initial discussions on how those methodologies could complement and enhance their own organization's approaches. A short survey conducted after the meeting (N=12) showed that all respondents mentioned an appreciation of learning more about partner's work. The group activities helped to foster internal collaboration and openness, and provided an opportunity for individuals to engage in small groups and strengthen their networks and connections across the partnership. The process also contributed to knowledge management as both the BAMM tool and the results of the brainstorming exercise generated information that will be useful over the life of the 5-year project.

7. What factors affected the success or shortcomings of your collaborating, learning and adapting approach? What were the main enablers or obstacles?

There were two limiting factors: 1) the ability to properly orient participants on the purpose of the card game; and 2) the ability to use the generated ideas in future work plans.

Each participant in the methods integration exercise came from a slightly different starting point in terms of their understanding of other organizations and of the project context. Not all participants had been involved in previous partner meetings, had learned about the other organization's methodologies, or been involved in scoping visits.

Breakthrough ACTION planned to have a session immediately preceding the brainstorming, which was meant to inform the card game and include a report back of insights from recent scoping visits. This approach would have grounded the methods integration exercise in concrete examples of the issues and problems the project is attempting to solve. Due to scheduling constraints, this session was not conducted as intended. Instead, a more general session to discuss each partners' thoughts on integrating approaches was carried out. While it was helpful to discuss these issues, the session was less useful than the one originally planned.

There also could have been a better explanation of the end product or outcome of the exercise. Participants talked about creating a database or "recipe book" of integration ideas, but this output was not understood in the same way by everyone. A short discussion on the types of integration Breakthrough ACTION hoped to achieve could also have been included.

The ability to use the generated insights was a constraint brought on by the availability of funding across the project work plans. For example, there was little room for larger-scale integration approaches in some country work plans. Many of the integration ideas were, therefore, less relevant once screened based upon this constraint.

8. Based on your experience and lessons learned, what advice would you share with colleagues about using a collaborating, learning and adapting approach?

For those considering using a similar approach, there are a few lessons that could be applied to improve this approach:

Ensure the inputs for the exercise (i.e., the BAMM tool) are completely and consistently filled in across participating organizations.

- Allow enough time and specificity for a discussion on how the integrated approaches will be applied (e.g., what does the final output look like, to solve for which problems, under which scoping or budget constraints).
- Consider facilitation by someone external to the participating organizations, which may allow for a greater openness to sharing or completely unbiased perception of the activity.
- Allow time for debriefing after the activity and conduct an after action review, including a survey to allow participants to capture the knowledge generated and ideas for improving the approach.