2018 CLA CASE COMPETITION

COLLABORATE • LEARN • ADAPT

Case Title:

Crowdsourcing Innovation for Better Monitoring Evaluation and Learning

Name: Jennifer Dahnke

Organization: QED Group

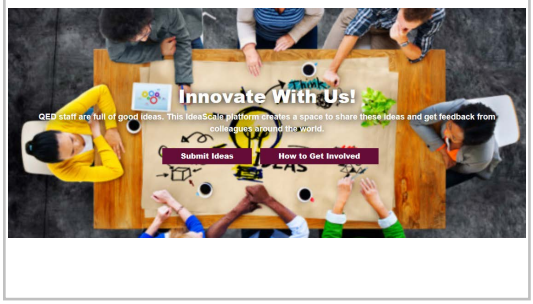

Photo Caption & Credit: QED's Crowdsourcing Platform. Credit: QED Group, LLC.

Summary:

In 2017, QED initiated a crowdsourcing effort to encourage staff connections and generate ideas to improve products and services. As a growing, global organization it was becoming evident that QED staff were increasingly decentralized even though they were often doing similar work with similar clients and partners. They had a lot to learn from each other but there was no forum to build relationships and share experiences, resources, and requests.

To solve this, we spent time talking with staff in the field and observing behavior patterns to determine the best tools and approaches to foster collaboration and knowledge sharing. A crowdsourcing platform was implemented, carefully tested, and shared with all staff in various locations around the world who participated in ideation campaigns on specific topic areas.

Ten campaigns have now been completed and our team has learned a great deal. Engagement between field staff has increased and more regular outreach and communications products exist to share information across QED's entire portfolio. Hundreds of ideas have been discussed and many innovations have been developed as a result--whether small "tweaks" to existing practices or elaborate tool development to enhance the delivery of MEL activities. Crowdsourcing is now just one of the ways in which QED fosters a culture of collaboration and knowledge sharing, but it was a great and effective place to start.

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
- [x] Adaptive Management
- [ ] Openness
- [x] Relationships & Networks
- [x] Continuous Learning & Improvement
- [x] Knowledge Management
- [ ] Institutional Memory
- [ ] 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?

Starting in late 2013, much of QED's core activities transitioned from being Washington-based to "field-based." This required shifts in a number of organizational functions--from finance to operations to STTA--to ensure that activities and staff around the world were supported. One gap that became increasingly transparent was the need to connect our field-based staff in various locations with each other to share experiences, challenges, ideas, methods, products, and tools. Although these teams often deal with similar issues, most requests were directed at home office staff when in reality the people who generally had the best advice were in another field office. Additionally, our staff would frequently brainstorm and pitch new ideas that could enhance their work (and their colleagues globally), but these were difficult to develop and fund through individual activity workplans and prioritize organizationally.

QED launched an Innovation Hub in early 2017 to help address these issues. The Innovation Hub uses an asynchronous crowdsourcing platform for knowledge generation and sharing. Structured by campaigns such as "Operational Improvement" and "Technologies for Participant Feedback" we use the platform to crowdsource ideas, queries, and feedback from staff in Uganda, India, Turkmenistan, West Bank, Egypt, Afghanistan, Washington, and elsewhere. In some cases issues are easily resolved or lead to further dialogue while in other cases, ideas require organizational investments to develop a new tool, process, or resource. These are further considered by a selection committee and scored on a series of criteria. Top ideas are moved forward for development and several tools have been and are being created to meet the needs of our field staff. Most importantly, however, through this process and platform we have begun to connect our staff globally through collaboration and shared learning experiences.

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

CLA is part of QED's DNA. Through various USAID activities such as the Knowledge-Driven Microenterprise Development (KDMD) project and the Uganda Monitoring, Evaluation, and Learning Program (the Learning Contract), CLA has been a central operating principle. Although QED has always fostered the values of collaborating, learning, and adapting, the lessons learned through implementation continue to be internalized at an organizational level. This is especially true of the emphasis that these approaches need to be intentionally planned and sufficiently resourced. In the case of QED's Innovation Hub, this meant that we developed a strategy for engaging our staff and choosing the right processes and systems for doing so as well as a commitment from our leadership to allocate staff time, bring in outside expertise, and establish a budget for developing ideas as chosen by the QED community.

CLA was not only helpful for addressing this challenge, it was necessary. Engaging any stakeholders to share their challenges, ideas, solutions, and experiences is an inherently collaborative endeavor but difficult to accomplish effectively when their interaction is almost entirely virtual. Our ultimate goal was that QED staff could learn from one another and apply what they learned--either directly or through the tools that would be developed through the process--to improve their outcomes. For this reason we spent several months planning and testing prototypes to ensure that the platform and associated Innovation Hub efforts were realistic and brought benefit to all our staff.

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 and possibly most important step in implementing this approach was to establish and understand the need. Through weekly home office meetings with field activity Chiefs of Party, visits with teams in the field, and monitoring home office requests, it became obvious that QED needed to establish better channels of communication between field offices and not rely on home office staff to be a go-between. Our team began discussing options and areas of interest on those individual weekly calls. Many tools and systems were presented but none demonstrated the ability for staff to share ideas in a coordinated way--this was necessary since many staff did not have established relationships and therefore had limited motivation to connect virtually on seemingly random topics or requests. When the crowdsourcing platform, IdeaScale, was presented, it seemed like a good option to customize a space for QED, was well-organized and easy to use, and offered an incentive system of "badges."

We tested the system with a small group and designed carefully crafted email introductions and instructions and hosted short trainings to walk staff through both the concept of a knowledge sharing and innovation space and the technical aspects of the platform itself. In some cases we did one-on-one account set up and trouble-shooting to ensure that all staff could access and were comfortable with the system. Some of our staff preferred to participate as a small group (instead of as individuals). Regardless of the request, we made creative adjustments to meet people where they were to ensure that everyone had a voice on the platform.

The first campaign was launched in spring 2017 on a topic that everyone had an opinion on--Operational Improvements. One of the most popular posts was on providing healthy snacks at meetings and that was a change that was considered and applied immediately. Other suggestions included things like having a QED policy and procedure wiki, limiting meetings, and holding team building sessions. The beauty of this first campaign was that it included everyone in the organization, taught them how to use the platform in a non-intimidating way, and allowed our remote staff to learn about one another and their interests. 42 ideas were generated with 124 comments and 332 votes (similar to "likes"). Future campaigns were more focused on technical topics and have led to the development of several tools that are currently in beta or being piloted for use by QED's activities. In several cases, field-based staff have launched campaigns to generate feedback from colleagues such as finding ways to introduce M&E concepts to new employees at the State Department.

Data is collected through the platform, tracked against communications and outreach efforts, and used to inform best practice and modify future campaigns to build off what is most effective. We found, for example, that sending messages and reminders at certain days and times led to a higher up-tick in contributions and that certain prompts and that the ways in which ideas were presented on the platform tended to generate more discussion. These lessons have been beneficial for other communications and engagement efforts across QED.

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?

This early effort to engage our staff globally to generate and share ideas has led to follow-on actions and investments that could not have been anticipated 18 months ago. It has established a shared understanding between field activities and demonstrated an organizational value and expectation that staff can and should connect without seeing home office as a gatekeeper to their interactions. Several formal communications have been initiated such as semi-regular correspondence from the president and HR as well as a QED newsletter. In April 2018, QED hosted its first Chief of Party Retreat, bringing all activity leadership together for one week of training, conversation, and team building. Many of the topics for this retreat were identified from issues raised on the crowdsourcing platform and it further illustrated an investment in collaboration and learning that lead to innovative ideas and positive change.

As staff in different parts of the world see the commonalities in their work and begin to establish relationships, they are more inclined to reach out for suggestions or resources. In this way our teams are able to leap-frog, building upon the good work in one area to customize or move it forward in another. When this is then shared back with the community it elevates learning and reduces the tendency to recreate wheels which is a common occurrence in de-centralized organizations and industries.

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?

Monitoring, Evaluation, and Learning (MEL) activities are notoriously difficult to attribute contribution to development outcomes considering the nature of this work is often several steps removed from local implementation. When MEL processes, methods, and tools are synchronized, however, resources can be maximized to focus on generating and presenting evidence in accessible ways that drives better decision-making.

What we've seen is that our crowdsourcing innovation effort has led to greater engagement as demonstrated through the Chief of Party retreat, formal outreach and communication products, references by staff who are connecting directly across field activities, and platform statistics. Additionally, several tools have been developed based on an initial idea generated through the platform, popular vote, staff comments, committee selection, development, and piloting with staff globally for feedback, utilization considerations, and improvement. These include a tool for measuring knowledge management and organizational development maturity--a common request included in QED's MEL activity workplans--and an application to create feedback loops on evaluation findings. In these ways, our approach has added value at the field-level in building connections and establishing instant access to information as well as developing tools and resources that make our MEL work more measurable, transparent, and responsive.

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

Our staff engagement efforts have seen highs and lows and we continue to refine our approaches as the effort is expanded beyond crowdsourcing and establishing connections. One of the biggest constraints is time and focus, which is a common issue that we hear and experience with clients and partners alike. This is why it's especially critical to start small and easy and to test methods and systems in advance to ensure that they work like you think they should and so that you can explain clearly and support others in getting up to speed. Once they see the value of the effort, they are more inclined to engage and to be involved in future efforts. This requires clear communication and responsiveness to issues and requests and well-functioning systems or resources. When people don't understand or things don't work, they can quickly become frustrated and give up--and then you've lost them. Another tactic that was especially helpful in launching our approach was word of mouth and incentives. People have different motivations for engaging and sharing information and it's important to recognize and create opportunities for various learning and communication styles and behavior patterns. For example, competitively-driven staff were focused on the points system and badges that the platform designates for active participation. Others were driven by the content and being part of the community. The more "buzz" that was created around the effort, the more people became interested and wanted to participate.

Of course the flip-side is that there were obstacles as well. Login issues frustrated and deterred some staff early on. They saw it as yet another system with yet another password. There was also a fear of judgment among others who were cautious about sharing ideas or feedback that could be negatively perceived. This feedback led us to continually refine our communications and intentionally offer safe, non-threatening topics.

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

In our experience, CLA is just good development practice. We work globally and the better we're connected, the more we can learn from one another and make changes that enhance our ability to deliver quality products and services. That said, it's important to start small and make sure that everyone is up to speed before taking on more. If we'd started the first engagement campaign with a narrow or overly technical topic, we would have lost most of our staff from the beginning. CLA should be about inclusion and something that everyone can contribute towards in their own way.