International Engagement for Impact in a Changing World

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Note

At the time that this book was published in February 2015, all of the links were active. Depending on when you are reading this, some may no longer be.

Table of Contents:

I. Introduction

The world is changing and many of us in our organizations and networks, and as individuals, are trying to find connections and approaches that will help us to better address our new environment in effective ways. In an era of 'buzzwords' that come and go or take on many different meanings (almost as a Rorschach test –i.e. we can all see the same thing differently), I chose the word effective carefully. Our words do matter. Why 'effective ways' and not new or innovative ways? We need to identify a broad range of approaches in order to find the ones that will work for us and our organizations, and they may not all be 'new' but reconfigure or re-conceptualize our approaches in different ways. And the concept of 'innovation' comes with heavy connotations. I like a definition of innovation that focuses on the development of different approaches (even if some of the component parts are not necessarily new); but many think of innovation as more purely 'new'.

And why the word 'impact' in the title? We've become complacent about outcomes as things we can measure – how many of this or that? We need to push ourselves forward to look at impact as how are lives being changed in positive ways through our efforts? We need to struggle individually and within our organizations and networks with the concept of impact and what it means to us. Why do we do what we do? It's in the struggling or grappling with concepts that we begin to understand their meanings to our specific situations and nurture a collective commitment to these concepts and goals.

How can our efforts get us closer to the life changing impacts we envision? We need, on a regular basis, to keep making the connections between our visions and the challenges of implementation, and adapt and modify as we learn – through our successes, and equally important, our failures. In an era that can sometimes feel chaotic, this book is my small contribution to helping organizations and networks that are engaging internationally find their way towards approaches that will increase their impact. And hopefully help move us all just a bit closer to the future we envision.

After each section you will see some sample **questions**. These questions are to aid you in your own thinking and process of discovery, hopefully generating additional questions that will help you along your journey.

II. What kind of **Impact** do we want to have?

What do we mean when we talk about **impact** and why is this an important discussion? For the past few decades we have judged 'success' of our social change efforts by counting what was easy to count – how many people came through an NGO's doors, how many are vaccinated, etc… but we have come to realize that although important first steps, these initial steps may not lead to a higher quality of life.

Often our efforts are focused for one maybe two years but when the initial focus and attention moves on are the efforts sustainable? How often do we go back and look at what's been accomplished (and what didn't go as planned) many years later and learn from these experiences? Part of the challenge historically has been having the institutional memory to help track back to what was done in order to evaluate over time. But with our new technologies and the ability to collect much of this information virtually it should in theory be easier to do. Part of the key may be planning some documentation 'capture' in to the initial process and at least periodic update. And organizations and donors need to focus more on the medium and long term rather than 'quick results'.

"Is this even working?" Ned Breslin of Water for People says we should always be asking. Are we moving towards our outcomes? Not is someone paying back a loan, but have they moved out of poverty? (Ned Breslin TEDx Talk – "The Value of Impact")

Ian Thorpe of UNICEF talks about the difficulty of tying outcomes to actions especially when there are many actors involved. He provides some suggestions, though, of how we can move more proactively in the direction of assessing impact including: (1) Trying to make a plausible case to look at how process impact can lead to actual impact; (2) Looking at qualitative measures such as the perceptions [of those involved]; (3) Collect individual case studies that illustrate the impact of coordination and explain the chain of events through which they do ; and (4) Have hard, and truthful conversations where we explain what we can and can't say about [our actions and their impacts].

Ricardo Wilson-Grau introduces the concept of "Outcome Harvesting" to focus on outcomes more than just activities. Outcome harvesting blends traditionally more quantitative approaches with more qualitative approaches – obtaining views of stakeholders and independent individuals knowledgeable about the project, and develop databases that can analyzed and interpreted through evidence based findings. Drawing on the evidence-based, actionable answers to questions, harvesters propose points for discussion to the harvest users, including how they make use of the findings.

There has also been significant discussion over the past few years about the concept of 'collective impact' – Partnerships focused specifically on impacts that can be brought about through collaborative activity. In an article that received some prominence, John Kania and Mark Kramer on Collective Impact outline "Five Conditions of Collective Impact" as: 1) A common agenda; 2) Shared measurement; 3) Mutually reinforcing activities; 4) Continuous Communication and 5) Backbone support.

"Impact" and "Assessing Impact" is an area where so much is happening, delve deep in your research to see what might be helpful to your own situation. There are no easy or definitive answers to these questions. It is the process of discussing them that will make your programs stronger.

Questions

- How do we define 'impact' in our context?
- Are we more focused on 'outputs' (doing things) than 'impact' (making real changes)?
- What are we currently assessing?
- What kind of impact do we want to have? What should we be trying to assess?
- How will our efforts make a significant difference to people's lives?
- How will we know our efforts are making a difference?
- How do we transfer the 'power of interpretation' and analysis (not just the ability to tell stories) from donors and 'experts' to beneficiaries?

Other Resources:

Short video from World Bank's Strategic Impact Evaluation Fund

Measuring Impact – Global Impact Investing Workgroup on Measuring Impact

Archaeological Evaluations

Data Shift

III. What's **Changing?**

As I wrote in a post for the Standard Social Innovation Review (SSIR) blog in June 2013:

"The only thing that is constant is change." Attributed to the ancient Greek philosopher Heraclitus, this phrase has been used many times since then, but in no era has it been truer than in our own. In the civil society sector, change is coming from many directions simultaneously:

1. **Demographics.** The baby boomers, who took civil society organizations to a new level, are now feeling the influence of a younger generation less focused on labels and structure. In 2010, 63 percent of Africa's overall population was below the age of 25; China and India were both estimated to have more than 300 million young people. According to youthpolicy.org, "This is the largest number of young people ever to transition into adulthood." Although youth have always played a "radicalizing" role, the number of young people who are now bypassing existing entities and starting their own organizations—many with new ways of operating—seems unprecedented. Youth for International Development, Edgeryders; and the Kenya Wazimba Youth Foundation are just a few of the new organizations founded by young people.
2. **Social entrepreneur impact and boundary blurring.** The social entrepreneur movement is influencing discussions about organizational structure and outcomes, leading to the creation of hybrid organizations such as the low-profit limited liability company (L3C) in the United States and Community Interest Companies (CICs) in the UK. In the *Stanford Social Innovation Review* article "In Search of the Hybrid Ideal," the authors predict that: "Someday, we may look at the advance of hybrid organizations as an early step in a broad reformulation of a current economic order, which for all of its successes has left many disenfranchised."
3. **Virtual communications**. The ability to communicate directly, rapidly, inexpensively, and globally means that organizations and movements can operate virtually and with more of a decentralized, "starfish" approach, where operational decisions can be made locally.
4. **Fragmentation**. Though we've improved our ability to communicate globally, in many ways we are becoming more fragmented. We talk and meet as youth, women, the technology community, international development practitioners and myriad other interest groups, but rare are the forums and gatherings that encourage cross-sector dialogue.
5. **New international configurations and players**. Historically, leadership in government and private foundation funding for development came from Europe, the United States, and Australia. We are now seeing the growing influence of a range of donors (such as Brazil and China) and new ways of providing aid.

How should NGOs and other civil society organizations deal with this tide of change? People are tackling this challenge; but conversations are often limited to institutes, think tanks, and exclusive gatherings. We need to take these conversations to new cross-sector, multigenerational venues and include practitioners who can help focus the conversation on how to transition from talk to action. How can we better engage practitioners (as time-limited as they are) to take charge of the transformative discussions that they and their boards need to be having? And how can we more widely share information about the ideas we are talking about and testing?

Questions

- What is changing in your internal or external environment?
- How do you identify change on a regular basis?
- How do you strategically think about internal and external change on a regular basis?

IV. Living with **Ambiguity**

In an environment where a lot is changing, a lot can be unpredictable. We can approach this as a challenge to overcome "how can we manage the unpredictable?" or we can see it as an opportunity that will open up new pathways. I once led a workshop around a project I was helping to create which was still emerging, when one of the participants commented "yes, your ambiguity is clear."

There are often many routes to take in pursuing a solution, especially when different cultures come into play, and a lot that's out of our control. Recognizing this, being flexible regarding things you can't control, and creating alternative pathways, can be a very important skill in any NGO, one that is engaging internationally or not. And is becoming increasingly important as we are expected to react faster to more sources of information.

Often groups feel a pressure to know where they are heading together when it may be that spending time exploring commonalities may result in a more useful direction. One of the most successful meetings I have ever facilitated had a period where the meeting looked like it was at a complete stalemate and the chair sent me a note saying "what do we do now"? What we decided to do was to toss out our agenda and focus on what value (if any) there would be in the group continuing to talk and possibly try out something together. By the time the meeting ended everyone was still talking to each other! and we did have an actionable item, although we still didn't know we had been successful in any meaningful way. Over ten years, later, with the new entity that eventually emerged celebrating its 10th anniversary we now feel like our strategy of being flexible and seeing what would emerge was just what was needed.

We may also be seeing a generational change in comfort with ambiguity and emergence. Nineteen year old Alex Jeffrey, co-founder of the One World Summits talking at a TedXYouth notes his focus on creating the space that allowed for opportunities to emerge rather than following a pre-determined plan. This movement towards allowing ideas to germinate within a group process is also why facilitation methods like Open Space and World Café have become so popular. So if you haven't already moved in this direction, try looking at change and unpredictability as opportunities. It may serve your organization and its goals well.

Questions

- Are you comfortable with ambiguity (however you may define it)?
- What appeals to you about 'emergence' and what feels uncomfortable?
- Are there small ways you can step outside your comfort zone?
- How can your organization step outside its comfort zone?

Additional Resources

Tools and Methods for Co-Creation in Workshops
Living with Ambiguity

V. Role of **Process**

Although change can be unpredictable and we need to stay flexible in a constantly changing world, process can help to provide a foundation for keeping us focused on our long-term goals.

As I wrote in a blog post entitled "What's the Recipe?" there are no shortcuts to bringing about significant outcomes. We are often focused on what's 'new' or 'innovative' and less focused on the time and effort needed to engage people over time. You may have heard or even fall prey occasionally to the approach that "If you just use this new innovation or tool, or have this kind of leader, or follow our recipe for success…" But it's not any one (or even two) new things. It's trying new things together with hard work and long term commitment, it's asking questions and brainstorming with the group, and having a vision, and learning from the group, and finding new partners, and innovating, and trying out these new ideas, and having a plan, and evaluating, and admitting failure and learning from it, and adapting your ideas, and lots of communication, and most of all its on-going commitment and having partners that can help sustain the effort. It's taking the time and finding the **customized mixture** that works for your organization or situation.

The connecting of vision to goals, to actions and an implementation plan is often done as part of 'strategic planning 101' for many organization but too often these plans are part of a check-off 'we did that' rather than a multi-year effort to be realistic about implementation. The more stakeholders that are involved, the longer and more complex the process will be, but it is more often than not worth the time that is invested.

I have been fortunate to be part of several long-term change processes. Here is a case study that was written about ActionAid and an organizational evolution that took significant organizational commitment and time, and involved a lot of stakeholders in many ways, as it sought to restructure and decentralize power within the far flung ActionAid organization and community.

And here is a case study about the American Academy of Pediatrics efforts to help create the Helping Babies Breathe program. The focus here was on cross-sector partnerships that could integrate the value added of the program into on-going local health initiatives to create a sustainable impact over time.

These type of case studies are important as they track efforts over multiple years which is often what is needed. And as part of learning processes, we need to be willing and have the time to try new things, make mistakes and learn from them. Our organizations are often driven by feeling that we need to please our donors by putting a positive spin on our efforts, and accomplish something we can report on in relatively short periods of time. But to truly bring about change and sustainable impact, especially when multiple environments and cultures may be involved, it can take years of nurturing partnerships and potential outcomes. It can take courage to change the traditional paradigms, but it can lead to more sustainable impacts in the long run.

Questions

- Do we have a process that balances keeping a focus on long-term directions with adjustments as needed?
- Do we have a process that will allow us to evaluate our progress along the way?
- How do we know when to stop being persistent and call something a failure so we can make adjustments and move on?

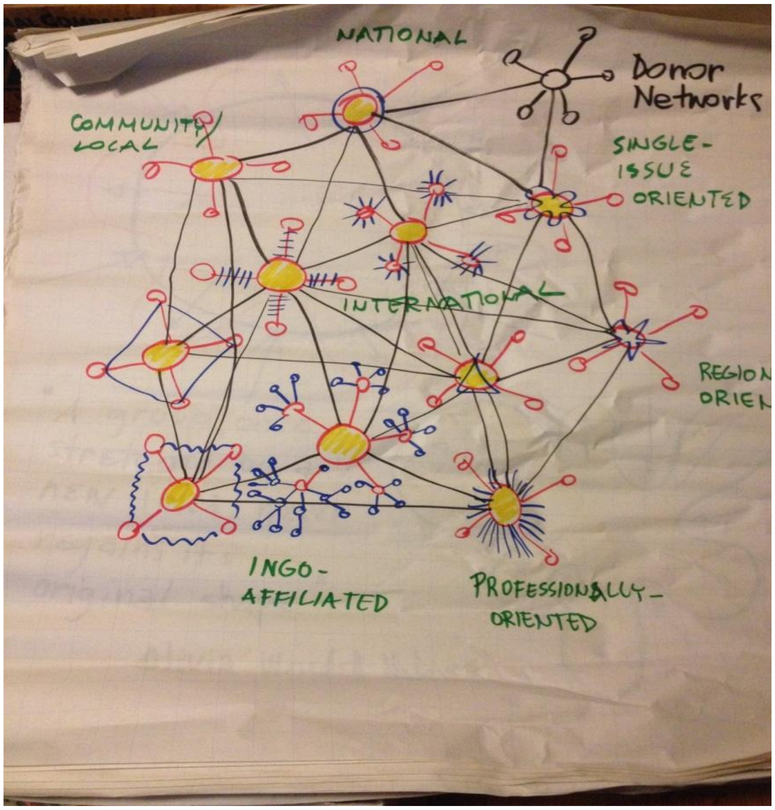
Additional resources

Reviewing Social Innovation labs

Knowledge Sharing Toolkit

Admitting and Learning from Failure

Adapting your ideas



VI. **International Outreach and Scaling**

For many years I have worked with organizations to increase their impact through international outreach. Sometimes this would take the form of seeking out information regarding what others were doing around the world, sometimes it would lead to working with partners in other countries on joint initiatives, and sometimes it might lead to 'getting bigger' by opening up a branch or an expanded presence in another part of the world. In recent years, that expansion stage has aligned with discussions around the concept of 'scaling'.

Scaling or Scale-Up are terms for a concept most commonly used in the business world to refer to growing the business so that it can sell more products and services, often in diverse or geographically spread markets. In the 'social sector' scale-up has come to refer to replicating or sharing good ideas or processes that can improve the quality of life. It too can apply to spreading the idea or process to diverse or geographically spread areas. Although the scale-up of organizations and practices has been happening around the world for years, there has been little sharing of information of effective ways to do so, how to decide whether or not to do so, and most importantly on how to effectively scale to achieve impact.

As noted above, working with groups involved in various aspects of scaling, as well as writing about these experiences over the past few decades, I have seen our perspectives on scaling change.

From 1997 through 2012 I helped with the creation and nurturing of the worldwide osteopathic community and their holistic approach to health care through the development of the Osteopathic International Alliance The success of this effort in many ways can be attributed to the then executive director of the American Osteopathic Association who was a co-creative leader before we were beginning to call leaders by that term, and the multinational steering committee that envisioned a worldwide community.

In 2011 I helped lead some discussions around scale up at the Ashoka 30th Anniversary Conference in Paris. For the purposes of the sessions I facilitated we used a working definition of 'expanding or growing your approach in order to increase impact.' We talked about various considerations to be aware of and the importance of reassessing periodically why you are doing what you are doing and if your plan might need adaptation. Although most of the focus was still on 'scale-up' as defined below, impact was clearly a goal most people had in mind, as perceptions around scaling were beginning to change.

In the past few years we are beginning to see a more robust discussion around different aspects to scaling (including a new Ashoka program Globalizers which is looking at Scaling Social Impact. Below I have outlined some of the different perspective to scaling that are emerging:

Scale Up – The historic approach - an entity or program gets bigger – geography can be a factor but not as important as how many goods are produced or services provided, usually by the one central controlling entity.

Scale Out – A variation on the historic approach that focuses mostly on a geographic spread - spreading good ideas, often expanding them/or an organization geographically, does not have to have as much central control.

Scale Deep – A new perspective of trying to spread good ideas that have worked well in one location successfully and sustainably to another, with local customization and **focus on scaling long-term impact** more than any one specific version of the idea.

Changes in perceptions do take their time. But to achieve impact at scale, our thinking needs to move beyond the historic definition of scaling as a centrally controlled scale up and the mindset that bigger is better. As a 2012 report by the Social Impact Exchange notes, scaling impact remains elusive: "Even the most effective mission driven organizations face the daunting challenge of scaling social impact." To truly scale deep we need to work closely with local partners and in some cases be ready to say that what worked well in one place, may not work at all somewhere else. With all of the ways in which the concept of scaling is talked about, one of the most important lessons is that **context matters**. In some ways **scaling deep** can be viewed as an impact that the social sector is having on the business sector, as opposed to the opposite direction - of scaling originally being a business term that was adopted by the social sector.

If one is looking to expand good ideas or programs, a major challenge is finding the balance between what needs to be standardized (i.e. done the same everywhere), and what can be customized locally. With the traditional business sector concept of scale up, the emphasis is on standardization with limited customization, only as needed to sell additional products or services (i.e. McDonalds in India sells chicken burgers instead of beef burgers). With scaling deep, the emphasis is on local customization – what needs to stay standardized, or core, to keep the integrity of the idea or program, can be kept at a minimum so that the local partners can customize to their own context and needs. Vesting local partners in this co-creative process raises the chances for long-term sustainability. Finding the right balance will call for leaders that understand the co-creative process, co-creative leaders.

My experiences with helping numerous organizations to 'scale up' or expand their international outreach has led me to some key concepts (and of course questions to be considerd!):

- **Goal clarity –** Have clear reasons for why you are considering scaling. What goals are you trying to achieve? Is international expansion the best way to do so? Who else is doing what you want to do that you might be able to partner with? Are there other ways to achieve the impact you are looking for?
- **What is core?** – Be clear on what needs to be core to the scaling and what can be customized locally. Try to minimize what needs to be core (or standard) to only those

things which keep the integrity of the idea or program. This will vary based on the context and idea or program so having a discussion about this as part of your process is critical. Lessons from programs and organizations that have expanded successfully show that we tend to think more is core than needs to be. Usually the more you can customize locally the more sustainable the efforts at the local level will be.

- **Customization** – when you have an idea of what is core, you can allow greater leeway in what can be customized locally. The historic approach to scale-up focused on trying to transfer most of what worked somewhere else. We are now seeing that minimizing what needs to be core (or standard) to only those things which keep the integrity of the idea or program, and allowing for maximum local customization will make the reiteration more sustainable.
- **Context -** Instead of starting with the approach that something worked well in one place, label it a 'best practice', and look for ways to scale it, let's start first with an analysis of why it worked well in a particular location/context and try to identify what aspects might be replicable (and what might not).
- **Local ownership / Partnerships** – Who is your constituency? For an idea or program to be locally sustainable there needs to be a plan for local ownership and local involvement from the very beginning of the scale-up process. What will the institutional structure be that will take the idea or program forward? There should be a willingness to 'pass off' the program at some point to those locally who can take it forward. This might be a government ministry, local entrepreneurs, NGOs, etc. For something to successfully transfer from one location to another, and be sustainable over time, it needs to work in partnership from the very beginning with those in the area we might hope to transfer it to. History is littered with good ideas and 'best practices' that have not been sustained when this step of working closely with partners – in a co-creative, not just token approach – is skipped or minimized.
- **Consultation** – If you ensure that communication is truly two-way, it is hard to 'over-communicate' in a successful scale-up process. Start your process planning with consulting your key stakeholders, and have regular consultation planned in. This is especially important if there are unequal relationships, for 'stronger' partners to consult with other partners.
- **Internal cohesion** – If the scale-up is focused on international expansion within an existing organizational structure, it is important to have a 'glue' that will hold the expanded organization together. This glue could be a couple of core values or patterns of regular communication, but there needs to be a bond that is created and nurtured among the organization's parts for them to stay unified when challenges come about (which they inevitably will).
- **Start small** – Start small and build incrementally. Have feedback loops to gather input you can apply periodically to make adjustments. Pilot projects can be a successful way to do this. Although it may feel like an imperative to scale up quickly so that your idea or program can have impact as soon as possible, it always proves worthwhile to establish a solid foundation first. I have been involved with a number of scale-ups that have had to 'scale back' due to overextending too quickly. Especially in environments where resources are at a premium, considering the risk to those precious resources that scaling up too quickly may present.

- **Keep it simple** – The easier the idea or program is to replicate or iterate the greater chance that it will be successful locally. The goals should be manageable and accountability clearly outlined.
- **Trial (and error)** – Sometimes to know how to adapt and customize you need to experiment and allow the ability to fail in order to learn and adapt. It may also mean being willing to admit that a good idea that works in one place may not in fact work outside of that context.
- **Time and Sustained Commitment**– effective scaling in my experience always takes longer than we think. The Twawenza website has a great reminder that "Real change takes time. We are not keen to just do easy activities and check implementation boxes." We need to have greater commitments (and funders need to commit the resources) to multiyear projects that allow time for 'failure' and adaptation.

Continuing to blur the barriers between the nonprofit sector and the business sector is the model of social franchising. According to the International Center for Social Franchising social franchising can be a useful scale-up strategy when philanthropic funds and aid grants are less available and where the solution is based on an enterprise model. At its simplest, social franchising can be equated to commercial franchising seen all over the world such as Body Shop or McDonalds. The central franchise documents their processes and then franchisees adopt the approach and are given support in establishing themselves. This allows them to set up a successful business much faster, with reduced risk, whilst maintaining quality. The critical difference with social franchising is that rather than creating profits for shareholders the aim is to create benefits to society. Founders of social franchises recognize that local ownership is important to create dynamic, entrepreneurial organizations that are responsive to local needs. A social franchise combines both local ownership and the creation of economies of scale that enable more effective enterprises to be developed. Living Goods is an example of social franchising.

In one of the first articles I wrote about scaling in the 1990's "Is it time for you to go International?" I ended with the thought that organizations should also "Recognize when not to go international". I would still say that this concept holds true: if you are hoping to scale ideas that have worked in one context, and that working with local partners you carefully study the context in which you hope to scale, you may decide that it is not advantageous to proceed (or at least not in the way you originally envisioned). But today I would also underscore that if you do determine that it would be advantageous to try a scaling effort, that you work even more closely with those local partners to ensure that you scale deep, giving your efforts the best chance of achieving a significant and positive long-term social impact.

Questions

- How do you define 'scaling' (geographic spread, more people engaged, etc…) and what do you think you can accomplish by scaling?
- Who else is doing what you want to do that you might be able to partner with? Are there other ways to achieve the impact you are looking for?
- If you decide to proceed, who is your constituency?
- What needs to be 'core' and what can be adapted locally?
- What will the institutional structure be that will take the idea or program forward?
- What processes do you have for maintaining internal communication as you engage additional people?
- What are your timeframes? Are they realistic?

Additional resources

Scaling resources

Social Franchising

From 'best practices to 'good practices'

VII. **Approaches** to Incorporate

a) Systems thinking / Dealing with complexity

We live in an increasingly complex world, but to implement effective solutions, especially on any type of large scale, we need to have relatively simple approaches that a wide range of people can follow. So much of what we do as practitioners is to translate complex ideas and solutions into simple (without being condescending or simplistic) approaches that others can follow. How do we bridge the gap that all too often exists between those who have time to think about complexity and those that don't but need to manage it?

Let's say that as a busy practitioner I actually have time to read an article or book or hear a presentation that presents some in-depth ideas that provoke my thinking. After I've read the book or heard the presentation, I may spend some time on and off over the coming weeks thinking about how it might practically apply to my work. I may bounce ideas off a colleague or two to better articulate my own thinking. If I am lucky, I may have the opportunity to pursue these ideas with others in my organization in a more structured way. Perhaps we will even develop a pilot project to test out some of these ideas, eventually finding an approach that will fit the organization and help it address the global challenges it aims to resolve.

This can be a relatively long and involved process that takes time and commitment. And it is often harder than it needs to be as we often do this kind of transitional thinking in short, 'stolen' bursts of time, or as individuals in isolation. What are some of the approaches that can help guide us to better integrate complexity resources in to our day to day challenges and decision-making? Here are some ideas:

1. Encourage your organization to be a learning organization: There is a lot of useful thinking available that can be extremely helpful to us as practitioners when our organizations value and allow time for reflection. For example, Donald Schon in "Reflective Practitioner: How Professionals Think in Action" talks about "reflection-in-action", an improvisational decision-making approach that professionals can bring to their everyday practices. It focuses on reflecting as we act, being more observant and aware of our actions. David Snowden has a Cynefin Framework, a similar approach that looks at how we Sense-Analyze-Respond. We take in new data (sense), then we can consider its implications (analyze), and try a new approach or pilot (respond). Ian Thorpe on his blog reflects periodically on what it means to be a learning organization, including this post "Too Much Learning by Doing?"

2. Look for general approaches: Owen Barder of the Center for Global Development cautions against breaking complex steps into 'how-to's that are prescriptive and can be too simplistic. He suggests that "If we are going to draw lessons, they should not be on how to get things done, but on what kinds of behavior or approach are needed." He suggests three of these: a) Do things which **encourage diversity and innovation**; b) Design ways to **'fail safely'** so that you can learn; c) Have e**ffective feedback loops** – find ways to ensure that what you have learned feeds back quickly into your next decision."

General approaches or core values can help maintain consistency among a large number of stakeholders who may be implementing a program while allowing for necessary local variation and the improvisation that Donald Schon and others describe.

The staffer of an international NGO involved in international development work (who blogs anonymously) moves in a similar direction in a blog post using Dave Snowden's Cynefin Framwork: "Embracing the Chaotic: Cynefin and Humanitarian Response". He outlines the following approaches: a) **Trust**. Organizations need to have trust in their personnel, and have confidence that given the responsibility, they will make good decisions in the heat of the moment; b) Processes (and people) need to be motivated not by procedure but by **principle;** and c) Systems themselves need to become **quick, adaptable and light**.

3. Meet people where they are at: This is one way that practitioners who are able to make time to reflect can help others they work with to translate complexity to manageable action. Deidre Schmidt, former Executive Director of the Affordable Housing Institute, describes having discussions with different staff members based on their own learning styles – are they big picture or detail people? Can graphs and pictures help? She also notes the importance of the 'translator' role when groups have a range of different experiences and skills. For example, not everyone necessarily needs to understand the details of technical issues as long as they have confidence in other group members to handle them.

4. Create informal learning communities in or outside of our organizations: If you do not yet work in an organization that values the time it takes for learning, you can seek out those who do share your need to allocate time periodically for reflection that translates to actionable steps and create informal learning communities. These peers can help us to carve out time for learning and reflection. We can share and brainstorm our ideas together and serve as each other's reminders to make this time on a regular basis.

Together as a community that is focused on providing tools to those who are engaging in significant social change, we need to work on ways to break down silos, and the lingo that often prevents information from being shared between different sectors. How we can create more opportunities for collective learning and sharing across silos, especially between academics and practitioners? Encourage more organizations to allocate time to be 'learning organizations'?

Questions

- Where else can we learn from?
- What do we want to understand better?
- Who else should be involved?
- What else may be connected? Influenced by our hoped for outcomes?
- Who might feel the consequences of our taking certain actions?
- What assumptions are we making that we can challenge?
- Can we track our discussions visually (graphically, through images) or in a different way to gain new perspectives?
- What might link to what? Is there a puzzle piece missing?

Additional resources

- A Leader's Framework for Decision Making by David J. Snowden and Mary E. Boone, Harvard Business Review, 2007
- "Systems, Complexity and Staff Realities"
- Taking Responsibility for Complexity
- An Approach to Evaluating Complexity
- Development impact calls for knowledgeable development practitioners
- Learning Organizations, then and Now
- Aid on the Edge of Chaos
- Problem Driven Iterative Adaptation

b) Communication

An important piece to being a life-long learner, or a learning organization, is to have strong communication systems in place. This starts with reviewing the environment in which you operate and who you need to communicate with. Words mean different things to different people, especially when we cross cultures. It starts with different usages of English from Australia to Kenya to the UK to the U.S., but it goes deeper than that as we strive to create groups that truly understand each other. We don't always define and practice 'communication' as two ways – a message that is sent, received and understood. If we focus on our messages being received, and ideally understood in the way we intended, the choice of words matters.

Many examples may come to mind for you. Here is one that I encountered in working with a multinational board: "To table" a motion in American English means to set it aside for the time being (or deal with it later)….while in Australian and British English it means to "put forward", such as in Parliament a bill is "tabled". You can see how without clarification, some confusion would arise.

There's an importance balance that needs to be maintained between clarity and semantics (a discussion of word usage that can veer into the technical and seem like a time waster). I once spent a ½ day working with a multinational group trying to decide if they should refer to their work as international or global. In the end did it matter which of the two words they chose? Probably not, but was it worth the time? The group felt so, as the process of engaging together to understand how different cultures were using the word, and what they wanted to collectively convey, took them forward in significant ways.

For you as an individual the following are some things you may want to consider:

<u>Written, Verbal</u> **-** There have been many articles written on things to remember (some of these include i) timezones – when scheduling a call be clear about time zone; rotating them in on-going groups calls so no one always has to have the challenging times ii) seasons are different around the world - recognizing this, rotating globes in written/visual presentations etc. iii) ,reducing the use (or explaining) acronyms and colloquial expressions; iv) speaking slowly, etc…). I am sure you can continue the list. The key here is to **practice** a more 'global mindset' so that it comes naturally or at least is at the forefront of your thinking.

Being very conscious of this (after having worked internationally for over 30 years now) I can see how people progress along a spectrum – don't notice at all; notice sometimes; are more consistent. And little things make a big difference when engaging with other nationalities (especially if you come from a dominant culture – American, British, Chinese - recognizing that yours is not the most important).

<u>Nonverbal</u> – Be very conscious of this, if you aren't already. Both what you are saying through your nonverbal communication and what others are telling you. It can often tell you more than

verbal communication, especially in cultures that aren't transparent or where 'saving face' is an important value.

Social media – Some platforms (especially those that are 'open' i.e. you do not have to approve a follower like Twitter, Quora) are very international. You can learn a lot from observing or engaging there (depending on your own goals).

Organizations function best when they have good communication structures. The more geographically diverse members of the community are, the more important this communication is. Most people do not feel the need to be part of every decision but they do want to know how they are being made, by whom, and if it is significant or controversial, the rationale. There is a lot written about external communication/marketing/ but not as much (as the equally if not more important) internal communication. Here are some things to think about in developing an effective internal communication plan:

- **Determine who needs to be part of the communication loop**: When you are about to start a new initiative or make a significant organizational decision, consider a broad universe of who should be involved in some way: Who should be part of the decision-making? Who should be consulted? And who should be kept apprised? A large international NGO I worked with developed a chart with each of its (many) organizational stakeholders and then discussed how different groups would generally be involved in different types of decisions. The list of stakeholders will be unique to each organization but could include board, volunteer groups, committees, task forces, senior staff, and other staff groupings. Just the process of having this discussion will help the organization's leadership to become more aware of the types of communication that will be needed.
- **Develop an internal communications plan:** The plan should detail who you will communicate with (as noted above) for what purposes and what approximate timeframes will be used throughout the decision-making process. Make this widely available.
- **Utilize the communications plan on a regular basis:** When you keep your stakeholders involved in decision-making processes in some way (even if it's just keeping them apprised of the key issues and timeframes) it will make it easier to implement the eventual decisions. Many decision-making 'how to' articles will instruct you to explore different perspectives, but not necessarily the importance of actually engaging your stakeholders, and the positive impacts on the 'post decision' period.
- **Special importance to geographically spread or culturally diverse organizations**: Although these are good practices for any organization to follow, they are especially important for geographically spread or culturally diverse organizations. In these cases the chances of people being left out of the communication loop are greater, and thus greater attention should be paid to ensuring that this does not happen.

This systematizing of effective communication is hard within any organization, especially in an era of 'information overload', but it is especially important and challenging for geographically spread or culturally diverse organizations. The more stakeholders involved and the more diverse (including geographically spread) they are, the more effort that must be put into effective communication vehicles to avoid misunderstandings. In the daily rush, it's easy to overlook that communication must be two-way.

Huge amounts of information is being sent electronically every day, but there can be too little structure to sift out what is relevant for learning to take place in the organization, and time and space created for busy practitioners to read and process available 'lessons learned' information. An additional challenge is to have structured systems that allow for a filtering and a free flow of information that is deemed 'important' for everyone throughout the organization, while remaining flexible in responding to changing circumstances and allowing local units the ability to respond to their local needs.

Management guru Peter Drucker wrote in a 1999 Atlantic article that 'What we call the Information Revolution is actually a Knowledge Revolution. What has made it possible to routinize processes is not the machinery; the computer is only the trigger. Software is the reorganization of traditional work, based on centuries of experience, through the application of knowledge, and especially of systematic, logical analysis. The key is not electronics; it is cognitive science.'

How do we balance the use of new technologies with the realities "on the ground", dealing with many different individuals (and cognitive processes), especially when an organization's operations are far-flung?

1. **Leadership commitment to being a learning organization** – Information is only as good as the human ability to use it. There are a number of steps here that all require organizational follow-through and commitment. They include: i) Conceptual (what does it mean to our organization to be a learning organization with a commitment to communicating with each other and externally so that 'lessons learned' can be shared and put to good use?); ii) Resources (what time and money needs to be devoted to developing our internal systems, with input from different users throughout the organization?); and most important iii) Implementation and Sustaining our systems (How do we ensure that they are used and modified periodically as appropriate, staying flexible to changing realities).

2. **Developing systems that provide some useful structure, while staying flexible** – Naoki Suzuki, in his book, Inside NGOs: Managing Conflicts Between Headquarters and Field Offices, writes about the challenge of developing systems that both provide some consistency among different parts of the organization while maintaining some flexibility for the local staff. Part of the challenge with internal organizational communication, when you have very different perspectives among the stakeholders, is finding common ground to understand, appreciate and plan for differences. Suzuki suggests that much of what can make this difficult balance successful is focusing on developing strong relationships throughout the organization and staff centered policies. His book was written in the late 1990's but this dilemma remains and has only become more complicated in some ways by technological options that can work to put barriers in the way of these discussions if not used effectively. One way to break down artificial barriers is for organizations to make opportunities for their headquarters staff to "get out in the field" and for their field staff to spend time in headquarters. It builds important human relationships and broadens perspectives. We better appreciate what we can experience ourselves.

3. **Keeping communication as a two way street, being cognizant of what may or may not work in different parts of the organization** – Cynan Houghton, a capacity building coordinator in a international NGO, notes that email can kill knowledge management (KM) and continuity of program management; but email is also an inescapable field tool. Ergo, knowledge management approaches must come to email, rather than trying in vain to get field staff to use fancy/heavy applications. His full post on this: Email KM Killer or KM Salvation.

In a post on ICTs, Linda Raftree notes: "Organizations that want to integrate ICTs in their work need to plan ahead and strengthen their staff capacity on the ground…Digital technology is only one way to innovate, and technology needs to be seen as one tool in the information and communication toolbox. For example, SMS might be just one communication channel among many options that are laid out in a project or program, and the most appropriate channels (which might also include face-to-face, paper, community bulletin board, phone calls, etc.) need to be chosen based on a local situation analysis and end-user input. Full post: Incorporating ICTs into Proposals

As much as we as an international community talk about the importance of good communication systems, and the changing realities in a very technological world, we still have a long way to go in the sharing of **what we are learning**. There is still far too much 'recreating the wheel'. There is an increasing amount of good practical information and "tips" being shared in the 'blogosphere' but it is fleeting and 'good practices' are usually not easy to access when you need them.

Questions

- Do you have a clear internal communication process? (Who should be part of the decision-making? Who should be consulted? And who should be kept apprised?)
- Do you have clear filters about what type of information should be shared (with whom and how)?
- Do all parties speak the same language or do translations need to be considered?
- Do you have feedback loops, letting people who provide input know how the information will be used?

Additional resources

Cross Cultural Communication resources
Advocacy Communications
Videoconferencing
Knowledge Sharing Toolkit
Agile KM for me and for you
Responsibility Assignment Matrix (RACI)

c) Crossing external boundaries and silos

As we have internal silos, there are also external silos we need to contend with. We refer to:

1. Non-governmental organizations or NGOs (also called by a whole host of other names in different parts of the world),
2. International development practitioners (aid providers, not beneficiaries who have only recently been 'asked to the [decision-making] table'),
3. Social entrepreneurs, a term with many different definitions (See Alison Rapping's blog for some of these),
4. Corporate representatives (focusing on another broad concept, that of 'corporate social responsibility' or CSR),
5. Academics who also play roles as international development consultants, and so forth.

We've looked at these sectors as having different interests and as functioning in significantly different ways. Sometimes out in the world, addressing challenges, practitioners from these different sectors might 'bump into each other' and might even decide to collaborate, but it was usually done in an ad hoc way, involving specific individuals or organizations working on a specific project.

More recently there has been a growing cadre of people who have begun to look at how the sectors can work together in more systematic ways; we have also begun to consider whether some of these sector boundaries and the sectors the way they currently exist might be becoming obsolete. This, of course, will not happen quickly, and we can expect a lot of resistance, but the discussion is beginning to take place in significant ways. Here is one very simple graph of where some of the linkage can be found, and some differences in perspectives that we may need to overcome:

Social entrepreneurs and NGO practitioners have in common the goal of 'social change' or 'social good,' but have traditionally come at this goal from different perspectives: social entrepreneurs from the private sector world's return on investment, and the NGO sector from a focus on mission. Due to these different perspectives and years of working and being trained in different 'silos,' the different sectors are often speaking different 'languages,' and outside of the small cadre of those who are seeing the linkages, have often been distrustful or even disdainful of each other.

A number of different factors are bringing us to a key juncture of revisiting these silos. They include: (1) After decades of focus on international development the pace of progress is being questioned, bringing attention to whether there are better ways of doing things that should be explored; (2) There is discussion in a number of sectors about looking more at impact than just output and how best to do this; and (3) Traditional boundaries are coming down – the increase in information technology and social media, capacity building in developing countries, etc. are all helping to bring practitioners from different sectors together. Differences between the sectors are now often seen as "gaps between the sectors" rather than just differences in the way they do business.

There are commonalities and similarities between the sectors that we can keep in mind as we seek to work with the commonalities:

Commonalities

- Finding the right global/local balance, customizing what needs to be 'core' and what can vary locally is a challenge faced by all entities that operate internationally no matter what sector they may be in.
- All sectors are grappling with the challenges of how to deal with and analyze increasingly large amounts of data.
- Although the regulations they pass can either help or hinder different goals, government tends to be an important focal point of the other sectors.
- The growth of 'the middle class' around the world (with more education as well as spending capacity) is increasing expectations from both the perspective of consumers and civil society participation.
- There is a wider range of countries – both in the governmental and business sectors – looking to provide aid, investment and/or develop partnerships.

Some Variations

- Business seems to have more of an orientation towards 'transformation', often now referred to under the catch-all phrase of 'innovation' and receiving attention in all sectors.
- The business sector is particularly good at 'taking risk'. Risk is often seen as multi-faceted and business people will look to diversify it and learn from failure, rather than being afraid of risk.
- Entrepreneurs who cannot initially find capital will 'bootstrap' their initial operations rather than waiting to get more significant backers.
- Business is the more proprietary sector, often being concerned about sharing many types of learning that they feel they can either charge for and/or want to keep from potential competitors.

When we have more opportunities to converse cross-sectorally that learning goes in all directions. One representative of a large international bank noted to me that he thought we should also acknowledge what business can learn from NGOs. In our conversation about engaging internationally his example was the time that NGOs put into nurturing local relationships.

Consciously building bridges, and reaching out of our silos, allows information and lessons learned to be more widely shared in order to gain a greater impact. To change systems and address major challenges we need to make time to connect with other initiatives, and ideally create accessible online, interactive portals that allow information and discussions to be accessed widely, when it is needed.

Questions

- Who else are you reaching out to? Where are you looking to for information?
- What are you expectations for this outreach?
- When you look at diversity do you also look at diversity of perspectives? Experiences?
- Have you done your research to understand how best to approach a potential partner?
- Are there ways that your organization/network could be structured or operate differently?

Additional Resources

Working Together

d) Capacity Building

Much attention has been placed by donors and training-oriented organizations in the past 10-15 years on helping NGOs around the world to strengthen their abilities to operate more independently. "Global north" or donor country organizations that may have struggled in the past to find local partners (or assumed that there weren't any) now find it easier to find them. But they can also find it challenging to adapt their operational styles to accept these groups as true partners. This transition is still unfolding – and the development of true partnerships is a work in progress – but as an international community we are moving in a positive direction.

Naoki Suzuki, in his book, Inside NGOs: Managing Conflicts Between Headquarters and Field Offices, writes about the challenge of developing systems that both provide some consistency among different parts of the organization while maintaining some flexibility for the local staff. This is also true for partnerships between different organizations when the expectations have changed to be more of a balance between partners that bring different strengths but each is recognized as adding significant value to the equation. Meg Mall writes in a blog post about "determining that fine line of how many resources to offer in order to successfully meet both our own objectives as well as our local partner's without compromising the local partner's ability to truly own the project."

The concept of capacity building throughout an organization or network may also provide opportunities to develop a collaborative plan among the various stakeholders, strengthening the understanding and appreciation of what each partner brings to the collaborative.

Questions

- How can the work we do become locally sustainable?
- Should our approaches be different?
- Are we listening at least as much as we are talking?
- Do we have good mechanisms to ensure effective, on-going communication?

e) External Dialogue and Partnerships

If you have decided you want to cross some boundaries, there are different audiences with which you may want to engage in dialogue with. It is important to clarify your purposes and goals in order to develop strategies for outreach, and assess its effectiveness. Being conscious about how you will be engaging a group is an important first step. Here are some possible audiences, some challenges and some ideas for how you might address them:

(1) **Networking**: It may seem almost obvious, but start with who you know and expand outwards. In informal conversations about potential connections, you might end the conversation with asking “who else should I talk with?” and ask for an introduction. Ask colleagues to share their experiences at events they may have attended. (Often we get so busy we just neglect to do this in any kind of systematic way. One organization I work with has created an interactive document they can all add to to share this information and create additional networking opportunities). If you are looking to ‘cross some silos’, purposely look for networks that are different to the ones that you or your organization have traditionally operated in.

(2) **Creating a collaborative group**: When groups are brought together within an organization or among diverse stakeholders it is especially important to clarify the goals of the discussion. Are you increasing dialogue to solicit feedback on an existing proposal or to create a new project from the beginning? Clarifying the expectations for the group can help to minimize miscommunication and potential dissatisfaction later on. If language is an issue you can increase the potential for all to follow the discussion by taking small steps such as encouraging all speakers to minimize the use of acronyms or expressions and speak slowly and clearly, having formal translation, or allowing “whisper translations” by one bilingual participant more comfortable with the primary language of the meeting to another non-native speaking participant who may be less fluent. Those facilitating the meeting can repeat and/or paraphrase on a regular basis throughout the session.

(3) **Online interactions** such as blogs or communities of practice are a good way to engage in initial dialogue with potential partners. If you are creating the online community, pay attention to creating a safe, supportive space, with participation being met with encouragement. For example if an online discussion is primarily in English and some non-native English speakers make attempts to participate, these efforts should be acknowledged and supported.

(4) **Groups with unequal relationships** (i.e. donors and beneficiaries, trainers and trainees, etc…) are particularly challenging situations in which to create true dialogue. Special efforts need to be made to create safe, supportive spaces that encourage frank discussion.

If your discussions move to the partnership stage you will want to clarify the goals, expectations and responsibilities of each partner. Do your due diligence but also be aware that no matter how much you try to anticipate, working globally often means learning to live with ambiguity and adjusting as circumstances change. (See Section IV for more on living with ambiguity.)

Questions

- Why are we doing what we're doing?
- Are we (currently) the best ones to do it? If so, can we do what we're doing differently/better? If not, should we continue to do it?
- Who else should we be talking with? Working with? (Who else holds the pieces of the puzzle most connected to our work)?
- How can we open up conversations with a range of potential partners (including the public)?
- Is there enough common ground for some type of partnership or joint initiative?
- What are the expectations of each potential party?
- How can the work we do become locally sustainable? Can we envision putting ourselves 'out of business'?

Additional resources

Listen First www.listenfirst.org

MindMapping

Creating Effective Partnerships

Five Keys to Effective Partnerships

Shaping Global Partnerships

Building an International Framework

The Helping Babies Breathe partnership

VIII. **Conclusion and Looking Forward**

When I wrote my last book (a little longer than this one☺) over a decade ago, I ended by saying I certainly expected some things (especially those that were technology driven) to change but that "the greater lessons may be that ….the concepts and ideas of inclusiveness, cultural sensitivity and understanding the human aspects of international engagement are critical to master and longer lasting." I am happy to say that I still feel this way. A benefit to the past decade has been that with the increase in information sharing that the technology has allowed us to do, and with the increased focus on global interactions, we now have a broader range of additional approaches and tools available to allow us to be "more inclusive, cultural sensitive and understanding of the human aspects of international engagement". The increased focus on understanding (the challenges and benefits of) true cross-sector partnerships, the importance of assessing the impact of our efforts (how we change people's lives), and what makes for sustainable efforts are important leaps forward. So the 'more things change, the more they stay the same' can actually be a positive statement. We still aim to "venture forth, being creative and strategic in our thinking and planning" and now we have additional ways to allow us to do that more effectively and with greater impact.

IX. **More Resources on Asking Good Questions**

Can Asking Better Questions Make us Better Innovators?

The Art of Asking Questions

Art of Powerful Questions

Creating the Future – Change the Questions, Change the World

Powerful Questions

Glossary

Capacity building - strengthen the ability of an organization to operate more independently

Co-create – Working together with space for equal responsibility to allow for unplanned outcomes to emerge.

Collective impact – Positive change that can be accomplished through collaborative activity.

Impact – varied definitions; I like: how are lives being changed in positive ways through our efforts (see introduction for further discussion)

Innovation – varied definitions; I like: the development of different approaches, even if some of the component parts are not necessarily new (see introduction for further discussion)

Scaling or Scale-up – varied definitions including replicating or sharing good ideas or processes (see Section VI for additional discussion)

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