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Learning Brief 2

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Learning at the Speed of Trust – supporting adaptive MLE for advocacy

This is the second and final Learning Brief which aims to share lessons with the wider advocacy community from an innovative project to support advocacy organizations to develop their core MLE capacities.

Box 1: Advocacy organizations that participated in MLE support project		
Friends of the Global Fight against AIDS, Tuberculosis and Malaria	International Civil Society Support / Global Fund Advocacy Network	Friends of the Global Fund Europe
Malaria No More	ONE	ACTION Global Health Advocacy Partnership

The project worked with six organizations that advocate on behalf of the Global Fund for AIDS, Tuberculosis and Malaria (the Global Fund), and received funding from the Bill and Melinda Gates Foundation (BMGF) to develop their core Measurement, Learning and Evaluation (MLE) capacities.

Through 2018 and 2019, a dedicated team from Itad provided bespoke support to the advocacy organizations to develop tailored skills, tools and systems to support their work. This was the first time a portfolio within the BMGF Program Advocacy and Communications team piloted a project like this. Given the innovative nature of the project, Itad has produced two Learning Briefs to document lessons from the project.

Learning Brief 2 focuses on five key lessons which we identified as critical for the advocacy organizations, the funder and the Itad MLE support team to effectively work together to help advocacy organizations integrate effective MLE practices into their ways of working. It takes a '360 degree' view by drawing on the practical experiences and reflections of the advocacy organizations, BMGF and the MLE support team.

Although the learning is drawn from a specific project, we believe that the lessons are relevant to a wide range of organizations wishing to use MLE approaches to strengthen how to use learning to adapt and improve their advocacy work, as well as for tracking change and reporting to funders.
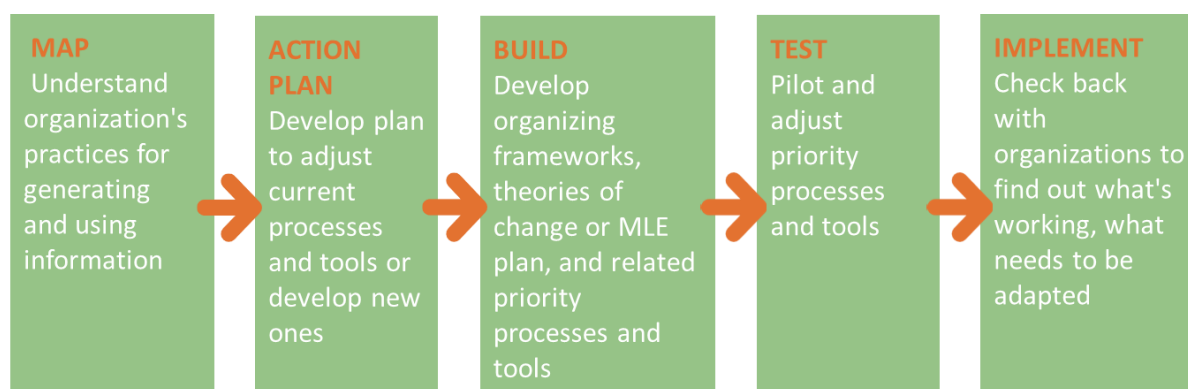
The brief is structured into three sections. Section 1 provides an overview of what Itad and the advocacy partners did to co-develop MLE systems, tools and processes. Section 2 sets out the organizational frameworks we developed to guide the project, and generate insights into the relationships, trust and organizational dynamics we identified as important to take into account when developing MLE capacities. Section 3, sets out key insights and lessons from our experience.

The brief concludes with a Spotlight that shares reflections from advocacy organizations and BMGF one year after the project finished.

1   The project story

From May 2018 through early 2020, Itad worked with six organizations in the Global Fund Advocacy Portfolio (GFAP) to co-develop MLE systems, tools and processes to use internally. Figure 1: sets out the process of the support provide by Itad.

Figure 1: **MLE Capacity Support Process**

MAP Understand organization's practices for generating and using information	**ACTION PLAN** Develop plan to adjust current processes and tools or develop new ones	**BUILD** Develop organizing frameworks, theories of change or MLE plan, and related priority processes and tools	**TEST** Pilot and adjust priority processes and tools	**IMPLEMENT** Check back with organizations to find out what's working, what needs to be adapted

The process was similar with each advocacy organization, but the content was highly tailored to the individual organization. Our job was to develop a collaborative, and trusted, relationship with the organizations, meet them where they were at, build on what they were doing well, and plant the seeds for continued and more aspirational MLE use. Box 2 sets out the principles that guided our work.

Firstly, we worked with the partners to map their practices for generating and using information, taking time to build the rapport and insights between the Itad team and the advocacy partners as the underpinning of the project. We then collaboratively developed a tailored action plan. The plan set out the different elements that each organization identified as priorities for development, e.g. organizing frameworks such as theories of change, an MLE plan and related MLE processes and tools. These elements were then tested and piloted with the support of the Itad team, until organizations were comfortable adopting and implementing the elements that they felt were most useful.

Box 2: Guiding principles for MLE support	
1	Meeting organizations where they are, promoting mutual learning and collaboration to identify and understand MLE needs.
2	Tailoring MLE to the size and resource in the organization, not imposing inappropriate MLE approaches.
3	Recognizing the need for knowledge capture without creating bureaucracy, by 'layering' MLE onto existing advocacy practices.
4	Enabling rapid application of MLE to support adaptation of tactics and strategy.
5	Valuing advocacy organizations' experience and judgement.
6	Promoting and modelling an enabling culture that supports MLE.

Itad's approach was guided by ensuring that MLE put useful information in the hands of the people who are doing the advocacy work.

2   Framing Adaptive MLE for strategic advocacy

We developed two frameworks to help understand and articulate MLE capacity development. The Adaptive MLE for Strategic Advocacy framework includes key dimensions that influence an organization's advocacy MLE capacity. The capacity support we provided focused on strengthening culture and practice across all these dimensions. Because we know that any development process is iterative and ongoing, with no simple 'before' and 'after', we later identified the MLE Practice Innovation Cycle to help Itad and the advocacy partners understand the dynamics and challenges of sustaining and embedding new MLE capacities within organizations.

Adaptive MLE for Strategic Advocacy Framework

Figure 2: **Adaptive MLE for Strategic Advocacy framework**

The MLE for Strategic Advocacy Framework was designed to help advocacy organizations analyze their journey towards optimized MLE for effective advocacy. Our experience and research into capacity building led us to take an organizational lens to first understand and map key aspects of how each organization worked as a whole before looking specifically at MLE capacity. Therefore, we designed the framework to help us and the organizations explore how advocacy organizations critically reflect on strategies, share insights to improve their work, and the informal and formal processes they have in place to support this. From this adaptive perspective, MLE has to be considered as much more than a set of results frameworks or data collection tools, which may miss important pieces of the picture of what is needed to support use and learning from MLE. For example, it is important to understand informal information exchange channels, as well as structured processes around accountability and reporting. We therefore framed MLE for advocacy as a dynamic organizational system, with five dimensions that span from organizational culture to data quality, captured in a visual as the 'wheel' in Figure 2:.

To harness the full potential of an adaptive MLE approach, the dimensions of the framework need to work together across the organization, but how they work will be different and unique to each organization. Applying the rubrics linked to the framework helped organizations map where felt they were and where they wanted to be on MLE. The collaborative process opened up dialogue that re-framed MLE as core to the development of the organization, way beyond results frameworks, data and reporting. Partners fed back that this was a new way of looking at MLE which sparked their interest. The focus on them as unique organizations with existing strengths as well as areas for MLE development was reassuring. Using the framework in this way helped to lay the foundations of trust that were key to the ultimate success of the project.

Box 3: Descriptors of the framework elements	
Organizational MLE culture	The formal and informal ways an organization acts to support MLE, encourages critical reflection that challenges and tests assumptions, and values the information produced.
Orientation of MLE systems and approach	The overall orientation, design, and quality standards of the MLE approach — i.e. focus, policies, practices, data quality, and timeliness—enable the organization to systematically and effectively collect, analyze, and use MLE information for learning, planning, decision-making, and accountability.
Integration with advocacy strategy dynamics	MLE is explicitly linked to advocacy strategy and planning, reflects an explicit notion of how change is anticipated to happen, and MLE information is used by staff and managers to critically reflect on strategies and support, or challenge whether our advocacy strategies are translating into the intended benefits and impact.
MLE resources and technical capacity	Staff have the appropriate skills, time, management support, and budget to deliver MLE for the organization.
Data collection and quality	The tools and processes to collect data are fit-for-purpose and aligned with available resources; they generate reliable and robust data.

Towards the final stage of the process, when the Itad team reflected on progress made preparing and planning the final months of Itad's work, we identified the centrality of organizational MLE culture to the adaptive MLE capacities framework. Across the organizations we worked with, it became clear that this was a necessary condition to embed MLE practice within the organizations. For this reason, we moved this element to the center of the wheel, with the other four elements positioned as 'spokes' that draw from this central element.

MLE Practice Innovation Cycle

We developed the MLE Practice Innovation Cycle to guide the transition for the advocacy organizations to take ownership of the MLE processes developed with Itad support, and to transition into leading their own MLE development. This framework sets out an iterative process of innovating new MLE practices, piloting them and then embedding them in the wider practice and culture of the organization. The MLE Practice Innovation Cycle helped us and partners understand the dynamics and challenges of sustaining and embedding new MLE capacities within the organization.

Figure 3: **MLE Practice Innovation Cycle**

During the first 12 months of project, Itad and the advocacy organizations moved through the first five phases of the cycle together. However, the crucial stage of 'Embedding in practice and wider culture' was not one that an external organization could lead. Therefore, the focus in final months of the project became to support a transition from a generative stage (where we co-designed adjustments to existing MLE-related systems and processes or generated new ones) to an implementation and integration stage—where responsibility transitioned to the advocacy organizations to lead the use of the MLE solutions in their work.

Box 4: Descriptors of the MEL Practice Innovation Cycle elements	
1	**Demand creation:** Promoting understanding of core MLE concepts and how they could help advocacy partners in their work. Activities included briefings and training sessions.
2	**Defining demand:** Working with the advocacy organizations to translate interest into tangible MLE approaches and organizational processes. Activities included dialogue and coaching
3	**Shaping priorities:** Mapping existing information gathering and sharing processes with advocacy partners. Activities included collaborative mapping using the MLE Framework for Strategic Advocacy.
4	**Co-developing a response:** Co-identifying a set of MLE priorities to provide a tailored and bespoke set of actions to address through the MLE support project.
5	**Introducing and piloting:** Agreed MLE processes and approaches developed and tried out with the wider organization to learn-by-doing about what would bring value and be feasible to adopt.
6	**Embedding in practice and wider culture:** Transition to the organizational leadership to take ownership of implementing and embedding MLE approaches and processes.
7	**Adapting and renewing:** The organizational leadership ensures that MLE processes are adapted and renewed regularly to keep them fit for purpose.

3   Key insights and learning

Our efforts to introduce this critical transition phase surfaced learning about how Itad and others can support organizations to not only adopt and own new MLE practices, but to proactively take steps to strengthen their overall organizational MLE capacity. We have identified five key lessons:

1. Culture is the central influencing driver of organizational MLE and merits more attention than we initially recognized.
2. When organizations adjust their expectations about the kinds of questions MLE can and cannot answer, it can be a positive sign that they are internalizing concepts and improving their understanding of what it means to integrate MLE in their advocacy work.
3. Dominant attention to funder reporting and external case building continues to crowd space for critical reflection and data quality.
4. Systematized tracking and reflection are prerequisites for more robust MLE and can help address organizations' inhibitions about the 'work' of MLE.
5. Enabling conditions for MLE need to be in place not only within the organization, but in the wider ecosystem of funders, peers and partners.

Culture is the central influencing driver of organizational MLE, and merits more attention than we initially recognized

As we got to know the organizations more, we became aware that the central driver of progress and challenges was organizational culture related to MLE, and to managing change and strategic development more broadly. We realized this merited more importance than we had anticipated.

When culture is supportive, such as leadership that genuinely models learning, uptake of MLE processes and tools is enhanced. When such supportive culture is not in place, the most well-designed

and relevant processes and tools are either not used or not used optimally. In our initial MLE capacity mapping process, we reviewed 'organizational MLE culture' as one of five elements. We interpreted this as "the formal and informal ways an organization acts to support MLE, encourages critical reflection that challenges and tests assumptions, and values the information produced."

In the initial mapping, we identified cultural limitations related to how organizations encourage critical reflection and challenge assumptions in ways that move beyond generating evidence of success. This was a challenge in all the organizations in various ways, and with varying levels of intensity. For example:

- In some cases, we found that MLE focal points were very supportive and engaged but that senior leadership placed little value in investing in MLE processes that did not directly help with fundraising or did not confirm success or prove impact.

- Networked organizations that had little time or space for critical reflection and were challenged with basic information sharing were using intensive resources to generate reports with limited space for MLE.

- Organizations that had an overall culture of working from activity to activity, with little space or appetite for planning or reflecting, also had difficulty giving substantive attention to using new MLE tools, particularly those that involve more systematic approaches to collecting information or more structured analytic processes.

- Some organizational leadership preferred to hear more about the type and number of activities, than about results and outcomes, making it difficult to find space to ask questions about effectiveness and improvement of advocacy strategies.

Where the organizational culture was geared towards reporting success, it was hard to open up a space to talk about the organizational areas that needed improvement.

We also identified enablers of culture change, including:

- Engaging senior leadership and influencers across the organization through 'quick wins' to demonstrate the value of MLE and foster ownership, e.g. refining an annual survey to improve response rates and supporting analysis to pull out more useful data.

- Right-sizing MLE approaches to meet organisations where they are, while allowing for growth, e.g. introducing simple tools such as key meetings trackers to document interactions with important stakeholders and advocacy targets.

- Creating space and time for people to experience MLE for themselves, learn by doing and showcase how they are using MLE tools and approaches, e.g. facilitating an after action review and building up to a more in-depth theory of change process.

Although culture is hard to change, especially by external partners, having an external partners who can accompany internal focus points tasked with developing MLE, can bring additional credibility and influence to ensure that quick wins build up over time to shift towards a culture that is more supportive of MLE.

> **Key insight:** MLE culture is not a technical challenge. It is about understanding the unique organization and how we can adapt MLE ways of thinking to support them. MLE is much more about improvement than success. It is not a silver bullet to 'prove' your impact, but rather to bring insights to help the hard work in the engine room of an organisation to help it to reach its full potential.

When organizations adjust their expectations about MLE, it can be a positive sign that they are internalizing concepts and improving their understanding of what it means to integrate MLE in their advocacy work

Elevating organizations' understanding of MLE takes time and attention. Beyond delivering workshops and trainings, concepts have to be repeated, demonstrated, and reinforced. As organizations internalized what MLE entails, they demonstrated greater awareness of the limitations of their previous practices. This recognition, in turn, helped to create a new openness within some organizations to shift how they think about and approach MLE.

For others, this recognition has not yet been internalized. For example, a senior leader within an organization challenged the notion that it was not feasible for the grantee to definitively and precisely measure the impact that their organization's advocacy has on preventing deaths from HIV/AIDS, tuberculosis, and malaria. In their view it was a just matter of finding the right technical fix.

Outsized expectations of MLE can dampen the appetite of staff to ask tough questions about effectiveness and dims the appeal of working on MLE in a way that is proportional and realistic for organizations. It signals that MLE is worthwhile only if it can deliver big, confirmatory headlines about an organization's impact, despite those expectations not being grounded in a credible understanding of what an organization's self-evaluation can deliver.

> **Key insight:** To counter unrealistic ways of thinking about MLE it is important to take time and plan activities to engage and demonstrate MLE concepts and insights to help establish realistic expectations of MLE and open the space for important critical thinking about effectiveness and improvement.

Dominant attention to funder reporting and external case building still crowds space for critical reflection and data quality

Funders can play an influential role in helping to foster a culture that values and rewards learning. Yet, organizations did not seem convinced that they would be rewarded for demonstrating learning, especially as it related to challenges, failings or weaknesses. A predominant focus on fundraising and maintaining institutional support limits appetite for processes that do not serve that need. Robust MLE that supports more evidence-based assessments, and may uncover critical findings, has the potential to create risk and vulnerability.

Further, organizations' motivations for engaging with us seemed to be driven, at least in part, by a desire to be responsive to BMGF, an important funding partner. This manifested as a limited interest in MLE that digs too deep and a heavy focus on reporting. With one grantee we encountered strong resistance to introducing changes in reporting processes. This is relevant because organizations often conflate MLE and reporting, such that resource-intensive reporting practices directly crowd out MLE.

> **Key insight:** Funders play a crucial role in modelling an MLE culture that encourages openness about challenges and setbacks, and that balances accountability with learning for improvement and creates an enabling environment and incentives for organizations to use MLE to strengthen their strategies.

Systematization, tracking and reflection are prerequisites for more robust MLE, and can help address organizations' inhibitions about the 'work' of MLE

Drawing on these lessons, we tried to make inroads with organizations by tapping into their intrinsic motivation to do MLE. Across all organizations, we introduced processes to improve systematization by grounding MLE in shared frameworks using the language of the organization to describe these— whether they considered this as a theory of change, a theory of influence, an MLE framework, spheres of influence, or another model that set out what they want to influence and how they can measure it. Simple processes and tools to support tracking of information, and sensemaking to process that information, helped develop fundamental MLE muscles that better positioned organizations for more robust efforts in the future.

We found most traction with MLE related to tactics: media, champion cultivation, and public organizing efforts. For example, confirming whether communications products are being used by target audiences. It may be that assessing the effectiveness of tactics is seen as having immediate potential payoff and lower risk because the results can be used internally to adjust planned activities. MLE related to tactics may also gain more traction because it can be carried out even in the face of limitations on time and in-house MLE capacity.

In contrast, we found less openness to questions about whether the grantee is doing the right things in the right way or their overall effectiveness to influence the big issues they care about. Given the concerns and cultural constraints we discussed above, this is reasonable, considering the higher stakes: no grantee wants to learn that their strategies are less effective than they had pitched them to be. Additionally, approaches to measure effectiveness of advocacy initiatives tend to require a higher level of resources and MLE capacity which may not be available to advocacy organizations which are structured to focus on implementing their advocacy work.

> **Key insight:** This deeper level of critical thinking, and questioning 'success' is a perennial challenge for most organizations, and may only emerge in contexts where MLE has become fully adopted as a key practice in the culture, life and learning cycles of an organization.

Enabling conditions for MLE need to be in place not only within the organization, but in the wider ecosystem of funders, peers and partners.

Our experience suggests that while an MLE capacity building effort may be well-designed and well-implemented, if the wider organizational conditions to support MLE are not in place, changed MLE mindsets, and new skills and behaviors will not be put into practice and embedded into the life of the organization. Hence, they will not be sustainable and may even be reversed, especially if key individuals move on.

The right conditions may already exist, or they may need to be catalyzed through further intervention. However, while most of the general capacity building literature agrees that enabling conditions are important for sustaining results, few sources provide specific insights into which factors and conditions are considered 'right', especially when it comes to MLE capacities, i.e. which factors should we prioritize, in relation to which functions and levels in the organization or its wider environment?

Key insight: Our experience in the project suggests that enabling conditions for sustaining the results of MLE capacity building are needed both within advocacy organizations and in the wider ecosystem of funders, peers, and partners. Enabling conditions need to be identified and aligned to work together so that they reinforce each other and create a virtuous circle that continues to support the embedding of MLE in the organization's culture and practice over time.

Spotlight: Learning at the speed of trust

Perspectives from advocacy organizations, MLE partners and funders supporting MLE for advocacy

About six months after the end of the project, we held a reflection event with staff from some of the advocacy organizations and BMGF. It was rewarding to hear how organizations had been able to sustain some of the MLE approaches we had developed and piloted together, and several important reflections and lessons were shared.

Incremental change is a more reasonable and sustainable expectation

From the start, we planned our MLE support and expectations for change to be proportional and realistic. Our work was based on meeting organizations where they are and moving forward from there. Our learning to date reinforces the appropriateness of this approach. We have added to this an improved understanding of organizations' capacity to absorb MLE support, particularly when it layers onto their existing work. The cultural and cognitive shifts that are often required, and may even be prerequisites for the types of changes organizations need to make, mean that actual changes in practice are small, often slow, steps.

As a result, some of the solutions may be less evaluative or sophisticated than we might like or expect. For example, we designed a tool and process for a grantee that used champion cultivation as a primary advocacy tactic. The tool covered champion selection, tracking efforts to engage the champion and their response, including analysis of a champion's potential influence on the Global Fund pledge and of the organization's potential influence on that prospective champion. However, for a small organization with a lean staff, it felt overwhelming, so we worked with them to streamline the process and tool. This gave the team an opportunity to learn-by-doing how developing an evidence base for outcomes in real time can also be highly useful for strategizing. Their growing interest in using the approach suggests that this might be a starting point for more comprehensive approaches in the future.

> *Forming tools that demonstrate they have value keeps buy in. Having a tool that pressed us to think how much we were engaging [the stakeholders], whether they were responsive to our intervention and if they were doing the things we asked built buy in which demonstrated the right expectations and built a culture of learning. The expectations have to depend on understanding your internal culture.*
> *(Advocacy Organization Representative)*

In another example, a grantee used a fairly simple after-action review to structure regular monthly updates from country teams and found that it generated useful insights over time as patterns of common challenges in different country contexts emerged. In short, we found that the steps organizations make can initially be small, but with routine use can start to make a difference to their work. Hopefully, by adopting approaches that fit with their resources and technical capacity this can lead to further change.

> *Following the global fund replenishment, a number of our partners used the after-action reviews to assess their advocacy and resource mobilisation work throughout the period. Those reviews allowed the BMGF Policy Advocacy and Communications team to articulate the added value of that partner in a given space.*
> *(BMGF Representative)*

We do not know the extent to which these steps will continue to lead to bigger changes and will be sustained. We also anticipate that the cultural issues that encourage or stymie these changes will come to bear even more profoundly as organizations take on more ownership and initiative of their MLE processes. However, six months after the project finished, organizations and BMGF shared encouraging examples of how the support has benefited them and how they are continuing to use MLE processes and tools. One advocacy partner, that works with sub-organizations, shared that after working with Itad to develop tools which focused on the outcomes of subgrantees' work, they were starting to see the tools being used in the sub-grant application process. They attributed this to tailoring the application process to match the tools. As a result, they are seeing sub-organizations use the tools to self-evaluate their activities and campaigns, and they are getting valuable outcome stories. They also highlighted the importance of a change of mindsets within the organization.

> *Internally our way of thinking has changed incorporating MLE into our strategy process upfront… This has been a valuable exercise for us and now we're focusing on learning how we extract the values and share the learning in a constructive way.*
> *(Advocacy Organization Representative)*

Space for dialogue and more realistic expectations

Program officers from BMGF who oversee the grants to the advocacy partners, highlighted the value of being able to have conversations with the organizations on what MLE meant for each organization. This included discussions with the organizations on what resources they required to incorporate MLE practices into their ways of working, and how BMGF's existing reporting templates support and hinder the organizations' MLE efforts.

The advocacy organizations highlighted how capacity, resource and time issues need to be considered upfront when building up MLE efforts. If funders would like organizations to move away from 'MLE as compliance', to get to a point where MLE is incorporated into the culture and practice of the organization, then funders need to think what works for the organization and be open to recognizing it is a continuous project involving continuous mutual learning.

> *The additional capacity gave us a shared vocabulary to talk about MLE in relation to their organizational capacities and goals. (BMGF Representative)*

Building trust and relationships

The tailored, bespoke approach and the relationship of trust between Itad and the organizations were flagged by both the advocacy partners and BMGF as crucial elements of the approach. The project's approach was thoughtful from early on to accommodate the different partners and meet them where they were in their MLE experience and journey.

BMGF staff shared an important reflection on the initial framing of the project. At the beginning of this process they had not seen that by framing it as providing additional support in MLE, organizations interpreted this as a sign of a deficit in their performance or reporting. It took transparent dialogue and trust building for the project to be viewed by BMGF's partners as the constructive support it was

intended to be to help them, as unique organizations, to find the right MLE approach and capacity for them, acknowledging how different they all were in their structure.

> *The buy-in between [organization] and Itad was important and we came away with three lessons: (1) A learning tool must not be an end in itself. You need to be able to apply the takeaways on a quick and ongoing basis. (2) You have to fit the culture of your organization, to understand where we were and accommodate changes going on in the organization. (3) Organizations are dynamic – when integrating change processes, this needs to fit with the organization, and demonstrate value to learning while the action is going on – this was an important part of the engagement with our champions building project. (Advocacy Organization Representative)*

About the project: MLE Capacity Support

The 2016–17 evaluation of the Bill and Melinda Gates Foundation's (BMGF) Global Fund Advocacy Portfolio (GFAP), conducted by Itad, identified an opportunity to optimize organizations' internal MLE processes. The evaluation found that organizations were at different stages of their MLE journeys, with some being in the process of developing tools and systems, and others not yet familiar with the value MLE could bring to their work. As a result, BMGF commissioned Itad to provide support to six GFAP organizations to ensure they have fit-for-purpose, core MLE capacities in advance of the 2019 Global Fund 6th Replenishment process.

The organizations that participated in the project were highly diverse, ranging from two-person secretariats of networked organizations to medium to large organizations, with various offices across multiple sites and countries. Few organizations had dedicated MLE staff, most had MLE functions embedded in other roles. In recognition of this, the support provided by Itad aimed to take a collaborative approach to co-develop MLE approaches to pilot, adapt and embed MLE tools and organizational systems that were tailored to advocacy organizations' unique contexts and needs.

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