The Technical Knowledge Exchange (TKX): An evolving learning initiative at PMA

Introduction

As a data collection and survey platform that works internationally on family planning surveys and collaborates with partner organizations in Asia and Africa, Performance Monitoring for Action (PMA) knows that learning is a requirement for this work – as it is for a university-based organization, and for any organization or project that wants to be successful in the 21st century.

But PMA went further than just passively letting learning happen and assuming that it would be effective. In 2017, the organization began its first iteration of what today is called **TKX, or Technical Knowledge Exchange**, a structured, project-wide learning initiative that works to promote and support *intentional* learning as a focus of PMA's work. TKX initiates and supports multidirectional learning between different individuals and teams, including across country teams based in separate institutions. TKX is designed to operate on a limited budget given the lack of earmarked learning funds and was able to continue thanks to project members who advocated for this work and collaborators who opted into participating- **so this effort was largely driven by the enthusiasm of participants.**

About this document

The TKX initiative at PMA was central to the organization's evolution, ensuring that learning stayed significant and structured, and supporting PMA's growth as a learning organization. This work was not easy or obvious, particularly in the context of small non-profits, where learning for all and at all times is often overlooked or only addressed with a single annual training.

> **In this document, we share what we learned in the process of our evolution, to help others consider if and how it might benefit from implementing a learning program, or even simply taking small steps toward becoming a learning organization.**

In the next sections, we will first discuss major phases of PMA's evolution, then briefly describe the structure of the TKX program and its guiding operational norms, before exploring in detail five key principles that have driven the TKX program, with examples of tools and methods for each. Finally, we offer our top six lessons about learning as well as ways for you to learn more about TKX.

Objectives
This document aims to:
- **Share our path**: Share our evolution and learning, as we implemented the TKX program
- **Explain our approach**: Highlight certain tools and methods we used along the way, hoping they may be useful to you - either directly or as information/inspiration for your own tools and methods

- **Provoke your thinking**: Get you thinking about how you can boost intentional and exchange-rich learning in your organization, whether you work on surveys or on something completely different

What we share in this document is based on our experience with the TKX initiative at PMA. The work on this initiative, and by extension this document that attempts to explain it, comes with clear limitations. As you read, we ask that you keep in mind the following limitations:

- **We haven't gotten it right yet:** We are continuously learning about learning, and about how to support our collaborators' learning. It has been an imperfect process, with significant trial, error, and revision along the way. We readily acknowledge the barriers to carrying out this type of learning work and the limitations of what the TKX platform can offer.
- **We lack the data to evaluate rigorously:** In the descriptions and explanations provided, we are drawing from lived and anecdotal evidence. We lack sufficient data to draw rigorous conclusions about this work; for example, we have struggled to measure learners' understanding of learning and their ability to apply these skills.
- **Our "exchange" is still limited:** TKX is still largely top-down in nature. Subsequent iterations of TKX platform should involve more involvement from partners at all levels of decision-making.

An evolving PMA

PMA has undergone many phases as an organization, through which it has continuously improved its approach to collaboration and learning. In its initial phase, reminiscent of a start-up, PMA team members were multi-tasking and experiencing lots of intense learning by necessity; tasks and learning were centralized, simply because there were many systems to set up in a short timeframe. Then, PMA moved toward a "maturing start-up" phase, having enough systems in place that we could recognize and respond to the need to train and support partner team collaborators' learning more. The decentralization of project skills and tasks, in part through newly introduced technical "bootcamps", was a way to have more hands actively contributing to the workload.

Reaching the beginning of a "steady state," with enough staff, systems, and skills to ensure that basic tasks were conducted, PMA identified an opportunity and a desire to take enumerator training work to the next level. The team hired an organizational learning consultant to improve enumerator training tools. With her support, the team collated an initial templatized collection of training tools, the "Basket of Tools", in a centralized digital location. These templates supported a phased progression to transfer training-related tasks to partner teams to lead. Moreover, this structured learning approach and a focus on decentralization were precursors to, and motivators for, the formalized learning initiative to follow.

Parallel to the cross-institutional learning, the PMA project also committed to supporting global staff members' learning . A goal-setting template and approach, the **IDEP (Individualized Development and Evaluation Plan)**, walked interested staff from all PMA countries through a process of goal setting, and developing a progression plan. The IDEP served as a reference document for professional development discussions amongst team members and between the learner and their supervisor and collaborators. The IDEP approach also allowed PMA to begin focusing intentionally on self-directed

learning[1] work. Acknowledging that there is not enough time, funding, or capacity to provide formal learning opportunities for all goals for all learners, the PMA TKX team focused on supporting the learner in supporting themselves. The PMA team began to share existing resources, from freely available guides to YouTube tutorials and webinars, with learners, based on the learner's stated goals in their IDEPs.

Decentralization of tasks and skills

PMA then turned its focus more intently to **decentralization of tasks and skills across the board to our in-country teams**. There was a focus on creating and refining a centralized list of technical skills required to execute a PMA survey cycle and collecting materials to accompany the learning of these skills. From this initial collection of materials, the TKX Library was born, a curated collection of internal and external learning resources. As the awareness about the benefits of structured learning grew, and there was a growing emphasis on partner organizations' abilities and autonomy, PMA (through TKX) began to focus even more specifically on decentralization through task transfer, considering and rating the transferability of each task, confirming the skills required to carry out the task, and providing opportunities to build skills related to the most transferable tasks. This decentralization work has become central to the way the PMA project operates.

The TKX program

TKX was initially called TCB, the Technical Capacity-Building initiative, and then rebranded as TKX, Technical Knowledge eXchange, to recognize the importance of not only existing learning exchange efforts but also the visibility of this exchange.

Structured, opt-in, individual learning

The TKX initiative focused on structuring learners' efforts and supporting systematic documentation of how to learn critical skills - both of which support skills and task transfer toward the higher-level objective of project decentralization. TKX worked with partner teams and individual learners to set technical learning goals and work toward those goals. Learners opted into TKX participation, with the support and encouragement of their supervisors.

Note: In parallel to TKX, PMA's partner, Jhpiego, began working with PMA partner organizations in 2019 on an Organizational Capacity Assessment (OCA) program. OCA focused on organization-level learning and assessment around the organization's operational capacity. The goal of OCA was for organizations to meet operational standards to facilitate receiving and managing grants directly.

Decolonization efforts through learning

The TKX initiative featured both direct and indirect ways of incorporating a decolonization framework through learning, with a notable focus on decentralization efforts. We worked to transfer ownership of critical tasks away from Global North headquarters by organizing and supporting mutual exchange

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[1] "Self-directed learning is learning in which the conceptualization, design, conduct and evaluation of a learning project are directed by the learner. This does not mean that self-directed learning is highly individualized learning always conducted in isolation. Learners can work in self-directed ways while engaged in group-learning settings, provided that this is a choice they have made believing it to be conducive to their learning efforts." Brookfield, S.D. (2009). Self-Directed Learning. In: Maclean, R., Wilson, D. (eds) International Handbook of Education for the Changing World of Work. Springer, Dordrecht. https://doi.org/10.1007/978-1-4020-5281-1_172

and learning initiatives, which contributed to a redistribution of power. We took this decentralization work further in 2021, when we restructured learning and capacity strengthening initiatives to center around decentralization efforts. The goal was to progressively transfer all appropriate responsibilities to local country partners. As part of this work, we also transparently identified and communicated the responsibilities that could *not* be transferred, for reasons of global standardization or efficiency.

Integration into the organization's operations

The TKX initiative has grown and slowly become integrated into the larger operations of the organization over time. This integration was possible in large part thanks to two elements on the part of PMA staff. First, PMA staff recognized the short- and long-term value of structuring learning as part of decolonization efforts. Also, PMA leadership supported the dedication of certain staff members' time to lead and coordinate this learning work.

Guiding operational norms

When enacting these principles, we implemented the TKX initiative in a way that leveraged two main foci:

- **Ensuring language equity in learning** – *including holding meetings in English and French and setting standards for translation and simultaneous interpretation; while this linguistic equity goal has budgetary implications, we consider it a requirement when working with multilingual teams.*
- **Utilizing virtual collaboration tools** – *including offering weekly virtual support sessions, hosting and moderating virtual collaboration platforms for sharing resources and asking questions (Slack), and creating and sharing videos on YouTube, which allows streaming in even low-bandwidth settings.*

TKX elements and their evolution

The TKX initiative has operated and evolved by leveraging a variety of tools and methodologies, all the while remaining responsive to needs, opportunities, and feedback, and being guided by overarching principles that aim at ensuring both practicality and the generation of meaningful learning experiences.

In this section, we share the key tools and methods that became central to the TKX initiative. We organize these tools and methods by principle, so they may serve to illustrate *our* take on turning these principles into actionable learning support.
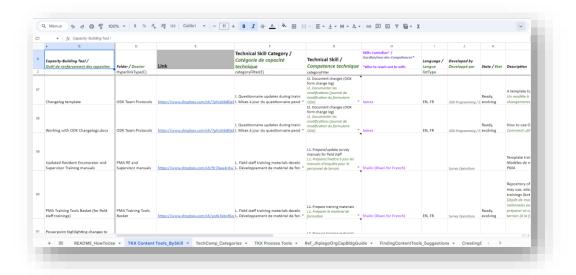
Principle 1: Capture and share existing knowledge.

Supporting others' learning is a time-intensive and expertise-intensive undertaking. We attempted to capture and share existing knowledge from our organization and partner organizations through tools, trainings, and other methods, in order to make knowledge and information easily accessible to all.

For example, we began recording and curating many 1-on-1 and small group training and coaching calls in the **TKX Library**, in order to refer back to them and share them with others learning the related skill, without having to find an expert and organize another call. Over time, the Library featured more tools and resources that were created by partners or from partners' experience and expertise. A simple and

central organization of learning resources, the TKX Library, organized in a Google sheet, can be an effective way to democratize access to these resources, encourage self-directed learning, and identify and fill gaps in the resources being offered.

Principle 2: Ensure that learning targets both what the individual needs to know for their job and what they want to learn for their current or future work.

Learners are both staff members who need to complete certain assigned tasks and individuals with their own interests and motivations. We wanted to support learning that targets both what the individual *needs* to know, based on their role and its scope, as well as what that individual *wants* to learn – be it for stretch assignments in their current role, future roles on a professional trajectory, or even simply learning something that is new and motivating for them. We also wanted to respond to requests from partner organizations to understand why certain core project tasks and functions needed to remain centralized within the TU.

One key tool that highlights this principle is the development of an organizational **Tasks & Skills List**. Not only did this list help us prioritize what learning resources to create with the limited time we could dedicate to this work, it also served as a roadmap for decentralization efforts. As an added benefit, some staff members noted that the process of creating these learning materials supported their own learning and furthered their own understanding of these processes. Another activity that aimed at supporting targeted learning efforts was a virtual two-hour **Goal-Setting Workshop**, to help learners identify, prioritize, measure progress toward, and plan how to go about learning certain targeted tasks and skills. Learners' targeted skills were grouped and sorted and were used to identify technical themes to focus on in each of the newly formed **Goal Clubs**. Having a dedicated Goal-Setting Workshop allowed us to provide more guidance, to process tools such as a Goal-Setting Worksheet, and to have time for individual and group reflection.

Principle 3: Support learning in an ongoing way.

Often times, organizations prioritize one-off learning events that are intense, time-bound, and structured. They then set intentional learning efforts aside until the next one-off learning event. This

approach ignores the value of ongoing learning, as well as the different forms that learning can take – both structured and unstructured, formal and informal. With TKX, we attempted to encourage and support learning, in its various forms, throughout the year and the project cycles.

PMA has been holding annual **bootcamps** since 2014. These three-day bootcamps have served as opportunities for structured learning, collaboration, sharing knowledge and experiences, and relationship building. Bootcamps focus heavily on core technical project skills, such as data management, data analysis, and survey operations, but began offering more sessions on building "hot" skills (otherwise known as soft skills) during recent iterations.

In between annual bootcamps, which require time-intensive preparation, we supported ongoing learning through **check-ins** with learners, as opportunities to reflect on goal progress and challenges to progress, as well as **Goal Clubs**, which targeted peer learning around a shared interest or skill. Finally, PMA set up a **West Africa Hub** to serve as a technical knowledge resource for Francophone partners; led by the Burkina Faso team, the Hub continues to facilitate learning and knowledge exchange between PMA Francophone partners in this region.

Principle 4: Integrate intentional learning into PMA ways of working and continue to highlight learning so it remains visible.

While learning happens naturally as we work, making learning intentional and visible ensures that we maximize opportunities for learning. The TKX initiative worked to integrate intentional learning into PMA's ways of working, while also continuing to highlight learning so it stays visible.

Key tools and methods that highlight this principle include naming **learning advisors** within the Johns Hopkins University-based PMA central team, developing a bilingual quarterly **newsletter**, and holding **learning sessions** for PMA central staff. Learning advisors acted as liaisons between their technical teams and the learners they supported, as well as representing their technical team's voice in TKX-related design and decision work. The quarterly newsletter allowed us to keep learning visible; we shared learning resources and frameworks, announced upcoming learning-related events, and celebrated outstanding "Learners of the Quarter." Lastly, learning sessions for PMA staff allowed us to support the learning goals of not only partner teams but also the PMA central team, and to provide staff members with opportunites to build coaching and facilitation skills for Goal Clubs, boot camps, and other learning-related support roles.

Principle 5: Build a learner's agency and autonomy in their own learning.

Given the evolution of technology, work culture, and professional roles and scopes, one of the top skills sought after when hiring in the 21st century is the ability to learn. Unfortunately, a heavy focus on university degrees, one-off learning events, and supervisors or partners dictating learning goals for others, have all de-emphasized the value and power in building a learner's agency and autonomy in their own learning. With this in mind, the TKX initiative deliberately sought to help learners improve their own ability to learn, regardless of skill or even sector. This investment in the learner's agency and autonomy benefited PMA during the life of the project and will continue to benefit the learner throughout their career.

The TKX initiative's efforts to begin teaching about the concept of **self-directed learning,** both *how* to do it (identify resources, reach out for help, apply and reflect, etc.) and the opportunities it provides to learners (e.g., define and lead your OWN learning! Go at your own pace!) represented a valuable investment with at least incremental progress. Self-directed learning is a skill that transcends time, task, and team, and reflects PMA's investment in the learner, beyond the scope and life of their role and the project. Collaborating with an adult learning specialist and identifying a learning advocate within the project help is critical to ensure that fundamental learning concepts are implemented, and that a learner's agency is supported and realized.

Our learning about learning

Top 6 Lessons: What we learned about learning at PMA

Through a series of internal reflection sessions, we discussed what we learned about learning during our time with PMA. We distilled the key ideas into six lessons, which we are offering for further reflection on how to support and improve intentional learning efforts:

1. **Creating a learning culture is hard.**
    It requires intention and a group of motivated individuals who act as the learning motor, helping to propel learning forward. When people are busy or those serving as the learning advocates and coordinators leave the organization, learning efforts are first to fall to the side.

2. **Time and funding for learning are chronically limited.**
    Learning efforts take time to coordinate efforts, create and source learning materials, learn and support learning, coach and advise, etc. They also *require* earmarked funding, both to formally allow the staff time required to organize and participate in learning, but also to bring in outside expertise and resources, gather learners for in-person events, etc.

3. **Power-biased collaboration is making true exchange a challenge.**
    As with many international development initiatives, PMA's work has been set up with one-directional learning and performance goals: "we teach them x so they can do y." The lack of multidirectional learning and performance goals can make it challenging to weave exchange-based learning into our structured work, and to justify the efforts directed toward it.

4. **We can design for engagement and motivation.**
    Fun makes learning easier. Even if not every learning activity is considered fun, an attempt to include fun and interactive pieces within learning sessions increases the chances that the experience is memorable and the learning is retained.

5. **The right systems and tools can support learning.**
    Having a list of skills to guide our learning efforts (individual, team, and organizational) has been invaluable. Specific tools and approaches for organizing learning efforts, such as goal-setting worksheets and structured check-ins can help to motivate learners to leverage the agency they have over their own learning. Finally, gathering, curating, and then "concierge sharing" them with learners can help to balance between scarcity and overwhelm/confusion when trying to leverage learning materials.

6. **Defining and measuring success in learning is not straightforward.**
   Measuring and evaluating learning progress takes multiple approaches and forms. There is no one successful metric that can capture learning progress, and qualitative feedback will be key in both understanding progress and improving learning programming.

Want to learn more about TKX?

STLR (Survey Training & Learning Resources)
Get a glimpse into PMA's learning expertise and explore our training & learning resources on the new *PMA STLR* section of our website.

STLR is a collection of the best resources we created to boost our enumerator trainings, improve our facilitators' abilities, and support our survey staff's ongoing learning. Browse the resources to see what you might adopt and adapt for your teams, your questionnaires, and your specific learning needs.

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