ADB

LEARNING IN
Partnerships

FACILITATOR'S GUIDE

Contents

Program
OVERVIEW

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BACKGROUND AND RATIONALE

ADB's long-term strategic framework, Strategy 2020,[1] outlines five drivers of change that will help it to pursue its development agenda. Two of the drivers identified are Knowledge Solutions and Partnerships. Partnerships are a core element of ADB's business model. ADB's partnerships are intended to "mobilize financial resources, leverage the power of knowledge, put ADB's unique abilities to wider and better use, meet specialized needs for highly specialized development projects, and help raise aid effectiveness throughout the region."[2]

The generation and application of knowledge underpins development effectiveness. ADB's developing member countries and partners recognize this and look to ADB to provide high-quality global, regional, and country-level knowledge.

ADB has formulated a set of actions designed to ensure that ADB's knowledge continues to expand, is practical and usable, and remains of the highest quality. These actions are organized under four headings:
• Sharpen the knowledge focus in ADB's operations
• Empower the communities of practice
• Strengthen external knowledge partnerships
• Enhance staff learning and skills development

This two-day learning program supports ADB's focus on the "Knowledge Solutions" driver of change in Strategy 2020 by seeking to enhance staff learning from operational experience of partnerships. The program will also support the focus on the "Partnerships" driver of change by enabling staff to strengthen external knowledge partnerships. Targeted participants for the program are Professional Staff working in ADB's Regional Departments, including the Resident and Regional Missions; the Regional and Sustainable Development Department; and the Strategy and Policy Department.

OBJECTIVES

The learning program explores how ADB staff can best leverage learning from the wide range of partnerships in which ADB engages, ranging from official development finance partnerships to knowledge partnerships.

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[1] Available: www.adb.org/strategy2020/
[2] Ibid. Strategy 2020, Chapter 5, p. 23.

OUTCOMES FOR PARTICIPANTS

This learning program enables participants to:

- Understand the characteristics of effective learning in the partnership context
- Use a typology of different ADB partnerships and manage the challenges and opportunities for learning that each form provides
- Build a learning dimension into new partnership agreements and MoUs
- Develop existing partnership relationships to leverage knowledge generation and sharing and mutual learning
- Put into practice the ADB Guidelines for Knowledge Partnerships
- Monitor and evaluate the learning dimension of partnerships

COMPETENCIES SUPPORTED

The learning program contributes to strengthening the core competencies "Communication and Knowledge Sharing" and "Innovation and Change" by enhancing staff members' knowledge of and technical expertise in taking a learning approach to working in partnerships in ADB.

Program
PREPARATION

> Please read through the following carefully so that you are well prepared for conducting the course.

FACILITATOR PREPARATION

Familiarize yourself with all of the materials including the PowerPoint presentation.

Make sure you have all the materials listed in the Materials Required section

Prepare sets of cards using the worksheets in this manual as follows:

- Carousel Discussion Cards (one set)
- Six Partnership Principles Cards (one set for each small group of 4)
- Word Mime Cards (one set for each small group of 4)

Print out copies of the handouts included in this manual for each participant.

Print out copies of the worksheets included in this manual for each participant.

Print out copies of the Course Evaluation Form (available on Excel file) for each participant

Download and print copies of the following ADB documents as handouts for each participant:

ADB (2004) Knowledge Management in ADB. Manila. Available: www.adb.org/knowledge-management/knowledge-framework.asp

---- (2008) Output Accomplishment and the Design and Monitoring Framework. Manila. Available: http://www.adb.org/Documents/Information/Knowledge-Solutions/Output-Accomplishment.pdf

---- (2008) Creating and Running Partnerships. Manila. Available: www.adb.org/Documents/Information/Knowledge-Solutions/Creating-Running-Partnerships.pdf

---- (2008) Focusing on Project Metrics. Manila. Available: http://www.adb.org/Documents/Information/Knowledge-Solutions/Focusing-Project-Metrics.pdf

---- (2008) Strategy 2020: The Long-Term Strategic Framework of the Asian Development Bank, 2008–2020. Manila. Available: www.adb.org/strategy2020/

---- (2009) Learning in Strategic Alliances. Manila. Available: http://www.adb.org/documents/information/knowledge-solutions/learning-in-strategic-alliances.pdf

---- (2009) Enhancing Knowledge Management Strategies. Manila. Available: www.adb.org/documents/information/knowledge-solutions/enhancing-knowledge-management-strategies.pdf

---- (2009) Managing Virtual Teams. Manila. Available: http://beta.adb.org/sites/default/files/pub/2009/managing-virtual-teams.pdf

---- (2010) Crafting a Knowledge Management Results Framework. Manila. Available: www.adb.org/documents/information/knowledge-solutions/crafting-a-knowledge-management-results-framework.pdf

---- (2010) Designing Knowledge Partnerships Better. Manila. Available: www.adb.org/documents/presentations/knowledge-management-and-learning/designing-knowledge-partnerships-better.pdf

---- (2011) Guidelines for Knowledge Partnerships. Manila. Available: http://www.adb.org/documents/guidelines/knowledge-partnerships/guidelines-knowledge-partnerships.pdf

Obtain and print out copies of the following reading for each participant:
Larsson, Rikard, et al (1998) The Interorganizational Learning Dilemma: Collective Knowledge Development in Strategic Alliances, Organization Science, Vol. 9, No. 3, May-June 1998.

Prepare a table on flipchart listing the 16 "qualities" from question 1 of the ADB – 'Northland Development Agency' Partnership Case Study Handout. The numbers 1-16 representing the 'qualities' should form the rows of the table and there should be one column for each small group so that each group can list and compare their scores for each quality.

Obtain some small gifts such as fruit or candy to give as prizes during the Word Mime activity on Day Two.
Print out handout versions (four slides per page) of the PowerPoint presentation for each participant.

Send out the following Readings in advance:
ADB (2008) Creating and Running Partnerships. Manila. Available:
www.adb.org/Documents/Information/Knowledge-Solutions/
Creating-Running-Partnerships.pdf

ADB (2009) Learning in Strategic Alliances. Manila. Available: http://
www.adb.org/documents/information/knowledge-solutions/learning-
in-strategic-alliances.pdf

ADB-Northland Development Agency Case Study Handout

Suggestion: If possible during the course take digital photos of the
group activities and flipchart presentations so that these can be
projected during the 'Wrap Up' session. The photos act as an 'Aide
Memoire' for participants and also provide some entertainment
for those participants who complete the personal action plan and
evaluation forms quickly.

OTHER MATERIALS REQUIRED
Plenary room and small-group discussion areas; whiteboard and
pens; 2-3 flipchart stands, flipchart paper and marker pens; laptop
and data projector; (optional: overhead projector, blank overhead
transparencies and overhead transparency pens).

PowerPoint presentation.

Adhesive tape (masking tape is best because it is easily removed) and
/ or Blu Tack for sticking cards and flipchart sheets onto walls.

Blank index cards in different colors.

PostIt notes in various colors and sizes.

Basic stationery for each participant (pen, pad, ring binder)

PARTICIPANT PREPARATION

Prior to the course ask the participants to read the following by sending documents or the URLs to download them:

ADB (2008) Creating and Running Partnerships. Manila. Available: www.adb.org/Documents/Information/Knowledge-Solutions/ Creating-Running-Partnerships.pdf

ADB (2009) Learning in Strategic Alliances. Manila. Available: http:// www.adb.org/documents/information/knowledge-solutions/learning-in-strategic-alliances.pdf

ADB-Northland Development Agency Case Study Handout. Because the case study is lengthy and detailed it is essential that it be sent out well in advance of the course so that participants read it before they arrive.

Program
SCHEDULE

DAY 1	
09:00 – 09:30	Welcome and introductions
09:30 – 09:45	Review of course objectives, program, and expectations
09:45 – 10:30	Partnerships in ADB
10:30 – 10:50	Break
10:50 – 12:00	Success factors for effective partnerships
12:00 – 13:00	Lunch
13:00 – 14:40	Effective learning in partnerships
14:40 – 15:00	Break
15:00 – 16:30	Assessing learning in partnerships
16:30 – 17:00	Reflection on Day One Feedback to facilitator / Individual learning logs Preparation for Day Two
DAY 2	
09:00 – 09:25	Review and Preview
09:25 – 10:30	Leveraging learning in existing partnerships
10:30 – 10:50	Break
10:50 – 12:00	Knowledge partnerships
12:00 – 13:00	Lunch
13:00 – 14:30	Designing and managing knowledge partnerships
14:30 – 14:50	Break
14:50 – 15:50	Monitoring and evaluating learning in partnerships
15:50 – 16:30	Course summary and Personal Action Planning
16:30 – 17:00	Wrap up and Course Evaluation Individual and group reflection on the course Course evaluation

ADB | Learning in Partnerships

Session 1
WELCOME AND INTRODUCTIONS /////////////////////

SESSION OVERVIEW
- Participants and facilitator introduce themselves.
- Using an exercise, participants have the opportunity to find out some interesting information about each other.

RESOURCES
One set of Carousel discussion Cards

WELCOME AND INTRODUCTORY ROUND		
10 mins	Welcome participants. Facilitator introduction. Introductory round. Participants share their name, job title, and department. Introduction to why this course is important for ADB.	
CAROUSEL EXERCISE		
20 mins	Introduce the "Carousel" exercise. The exercise is an opportunity for people to get to know each other in an informal and relaxed way. Participants should arrange their seats in two concentric circles, each with the same number of chairs. The inner circle has the chairs facing outwards and the outer circle has the chairs facing inwards. Chairs should be arranged in pairs, one in the inner and one in the outer circle. The facilitator should join in the exercise. If this makes an odd number, add an extra chair to the outer circle and explain that this is the timekeeper's chair. Whoever sits in the chair calls out the time.	Carousel discussion cards – prepared in advance

Place a Carousel card between each pair and explain that these cards will act as discussion starters. Each person has only one minute to discuss what is written on the card. After exactly 2 minutes the facilitator (or the person sitting in the extra Timekeeper's Chair if there is one) should call "Time". The participants must then leave the card between the chairs. Those on the inner circle should move one chair clockwise whilst those in the outer circle move one chair anti-clockwise. Each person should then have a new partner and a new subject to discuss. Repeat the process about four or five times. Ask participants what they found interesting about the experience. Point out that even in a short time, people can deepen their relationships through structured experiences that encourage sharing.	

Carousel

DISCUSSION CARDS ///

Instructions for facilitator:
Prepare one set of these cards by cutting out the statements and sticking each one to a card. If you wish, you can add some statements of your own using the blanks.

Describe something that you have achieved in the past year that you are pleased about.

If you could travel to any part of the world, where would you go and why?

What are you looking forward to most during this course?

If you could have a conversation with anyone in the world, who would you choose and why?

What do you enjoy most about your job?

What is the most challenging part of your work?

If you could change one thing about your organization, what would it be?

Name someone who has really influenced your thinking. In what way did they influence you?

Name one of your interests outside work and why you enjoy it.

What would be your ideal job?

What do you like to do to relax?

What, for you, is a characteristic of an effective team?

What do you hope to learn from attending this course?

What do you wish for the future of your organization?

Describe a place from your past that you would like to re-visit.

What gives you most satisfaction
in your work?

Others

Others

Others

Others

Others

Others

Others

Session 2
REVIEW OF COURSE OBJECTIVES, PROGRAM, AND EXPECTATIONS /////////////////////////////

SESSION OVERVIEW
- Facilitator explains course objectives and program
- Participants' questions are addressed
- Groundrules are agreed
- Course practicalities are explained

KEY LEARNING POINTS
Course objectives and program
Groundrules for the course
Course practicalities

RESOURCES
PowerPoint presentation
Flipchart and marker pens

REVIEW OF COURSE OBJECTIVES AND PROGRAM		
5 mins	Present module objectives, course overview and program and deal with any questions of clarification.	PowerPoint
5 mins	Establish groundrules for the conduct of the course including the importance of confidentiality.	Flipchart and marker pens
5 mins	Explain contents of folder: handouts, worksheets, notes version of PowerPoint, and any other resource materials. Briefly explain course practicalities: emergency exits, location of washrooms, breaks, and meal arrangements.	PowerPoint

Session 3

PARTNERSHIPS
IN ADB

SESSION OVERVIEW
- The strategic context for partnership in ADB
- What ADB means by 'partnership'
- Why ADB forms partnerships
- A typology for understanding ADB partnerships – levels, legal basis, and joint activities

KEY LEARNING POINTS
Partnership is one of ADB's "five drivers of change" in Strategy 2020.

There are many different definitions of the term 'partnership'. One common explanation defines partnership in terms of mutuality and organizational identity.

All partnerships have the potential for knowledge creation and transfer.

ADB forms partnerships for many reasons ranging from expanding capability to accessing resources.

All ADB partnerships can be described using three dimensions: level, legal basis and activities.

RESOURCES
PowerPoint presentation

Flipchart & marker pens

Strategy 2020 document
(Available: www.adb.org/about/polcies-and-strategies)

INTRODUCTION AND OVERVIEW		
2 mins	Introduce session overview using PowerPoint Deal with any points of clarification	PowerPoint
THE CONTEXT FOR PARTNERSHIP IN ADB		
5 mins	Use Partnership and Strategy 2020 PowerPoint to introduce Partnership as one of the five "drivers of change" in the ADB Strategy 2020 document. Refer to the quote from p16 of Strategy 2020. Emphasize that whilst some partnerships have knowledge sharing as their primary focus, all partnerships have potential for stimulating mutual learning.	Partnership and Strategy 2020 PowerPoint Strategy 2020 document
WHAT DOES ADB MEAN BY PARTNERSHIP?		
15 mins	Explain that there are many different definitions of partnership. Each emphasizes different characteristics of the partnership. Use The Partnership Ideal PowerPoint to introduce Brinkerhoff's characteristics of an ideal partnership. Emphasize the importance of mutuality, respect, accountability and transparency. Use Partnership as a Collaborative Relationship PowerPoint to explain that a common way of defining partnership is in terms of mutuality and organizational identity. Explain that in Brinkerhoff's model, partnership is one of four types of collaborative relationship characterized by high levels of mutuality and respect for organizational identity. Use Indicators of Mutuality PowerPoint to explain what is meant by 'mutuality'. Mutuality refers to mutual dependence and entails each actor respecting the rights and responsibilities of the other. Partnerships with high levels of mutuality are characterized by a strong shared commitment to partnership goals and objectives and an assumption that these joint objectives are consistent and supportive of each partner organization's mission and objectives.	The Partnership Ideal PowerPoint Partnership as a Collaborative Relationship PowerPoint Indicators of Mutuality PowerPoint

	Use Indicators of Organizational Identity PowerPoint to explain what is meant by organizational identity. Organizational identity refers to the organization's sense of what makes it distinctive and enduring. Organizations with a strong sense of identity remain consistent and committed to their mission, core values, and constituencies. Organizations with weak sense of identity may be unclear about their mission, core values, and constituencies or willing to compromise these for the sake of maintaining relationships. Explain that Partnership occurs when mutuality and organization identity are maximized. Explain that Extension happens when one organization "calls the shots" and the other is unable to maintain its independent identity. Explain that Contracting occurs when one organization seeks out specific organizational characteristics and competencies in another to achieve its own objectives, In a contracting relationship each organization is able to maintain a high level of identity though the relationship itself is imbalanced (has low levels of mutuality). Explain that Co-optation occurs when there is an apparently high level of mutuality in terms of agreement on ends and means but one organization finds itself compromising and adapting to the point that it loses its sense of identity and may be absorbed or dominated by the other. Open a discussion on which of the four types of collaborative relationships just described are more common in ADB. Use What Does ADB Mean by Partnership? PowerPoint to introduce a definition of partnership used in ADB. Point out that this definition could encompass all four types of collaborative relationship previously described.	Indicators of Respect for Organizational Identity PowerPoint What Does ADB Mean by Partnership? PowerPoint

WHY DOES ADB FORM PARTNERSHIPS?		
10 mins	Use Why Enter Into Partnerships PowerPoint to introduce the many reasons why organizations form partnerships. Open a discussion about which of these reasons are most important to ADB. Reflect that there is unlikely to be a single dominant purpose for partnerships. The motive depends on the circumstances and different combinations of reasons may apply in ADB partnerships.	Why Enter Into Partnerships PowerPoint
	Use Effects of Partnerships PowerPoint to explain that three main categories of effects can arise through partnership: strategic, knowledge creation and political effects.[3] Conclude that all partnerships have the potential for knowledge creation and sharing even if that is not the main purpose and this should be considered in every partnership agreement.	Effects of Partnerships PowerPoint
A TYPOLOGY FOR UNDERSTANDING ADB'S PARTNERSHIPS		
10 mins	Explain that because ADB uses the term 'partnership' to cover a wide range of relationships with other organizations, it is particularly useful to develop a typology in order to differentiate between the different relationships that ADB calls "partnerships".	
	Use the ADB Partnerships PowerPoint to explain that every partnership in ADB can be located using three dimensions - partnership level, legal basis, and joint activities – somewhat like a Rubik Cube.	ADB Partnerships PowerPoint
	Use the ADB Partnership – Level PowerPoint to introduce the five levels of ADB partnership: country/region, institution-wide, sector/theme focused, project focused, and co-financing. Ask participants for examples of these from their own experience.	ADB Partnership – Level PowerPoint

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[3] Ref: Hardy, Cynthia, Nelson Phillips and Thomas B. Lawrence (2003) Resources, Knowledge and Influence: The Organizational Effects of Interorganizational Collaboration, Journal of Management Studies, 40:2

	Use the ADB Partnerships – Legal Basis PowerPoint to introduce the wide range of legal agreements that can underpin ADB partnerships. Each of these has different legal implications concerning mutual obligations and expectations.	ADB Partnerships – Legal Basis PowerPoint
	Finally, use the ADB Partnerships –Activities PowerPoint to introduce the very wide range of activities that can form the focus of an ADB partnership. Emphasize that some partnerships may include more than one area of activity.	ADB Partnerships –Activities PowerPoint
	Conclude by explaining that these three dimensions can be used to locate every ADB partnership. Each combination of dimensions will have implications for how the partnership relationship is managed.	
CONCLUSION		
3 mins	Using PowerPoint, present the key learning points from the session.	PowerPoint

Session 4
SUCCESS FACTORS FOR
EFFECTIVE PARTNERSHIPS /////////////////////////////

SESSION OVERVIEW
- Introduction
- Obstacles to partnership
- The partnership cycle
- Characteristics of effective partnerships
- Six partnership principles
- Simple rules to make partnerships more effective

KEY LEARNING POINTS
Partnerships go through six key stages.

Many problems that arise in partnerships can be avoided by careful planning and negotiation at an early stage.

Partnerships are more likely to be successful if they follow the six partnership principles.

When working in partnership it is important to focus on both the task and the process of working together.

RESOURCES
PowerPoint

The Partnership Cycle Cards

Hardy, Brian, Bob Hudson and Eileen Waddington (2003) Assessing Strategic Partnership: The Partnership Assessment Tool, London: Office of the Deputy Prime Minister. Available: http://www.communities.gov.uk/documents/localgovernment/pdf/135112.pdf

ADB (2009) Learning in Strategic Alliances. Manila. Available: http://www.adb.org/documents/information/knowledge-solutions/learning-in-strategic-alliances.pdf

ADB (2009) Managing Virtual Teams. Manila. Available: http://beta.adb.org/sites/default/files/pub/2009/managing-virtual-teams.pdf

SESSION OVERVIEW		
3 mins	Introduce session overview using PowerPoint Deal with any points of clarification.	PowerPoint
WHAT CAN GO WRONG IN PARTNERSHIPS		
10 mins	Divide participants into small groups of no more than five individuals. Ask participants to brainstorm onto PostIt notes "What can go wrong in partnerships?"	
THE PARTNERSHIP CYCLE		
10 mins	Use The Partnership Cycle PowerPoint to introduce a six-stage model for understanding the lifecycle of a partnership. Stick The Partnership Cycle Cards onto six flipchart sheets and put these on the wall. Now ask each group in turn to add one PostIt to the flipchart that represents the stage when they think the problem is most likely to arise. Ask groups to avoid posting duplicates. If you think there are some problems, which have not been identified, add your own PostIts and place them on the appropriate flipchart. When this is done, take a photograph of each flipchart.	The Partnership Cycle PowerPoint The Partnership Cycle Cards
15 mins	Now ask for one or two volunteers to place the PostIts on the Flipcharts that represent the stages where they think the problem could be most easily avoided (if at all). Use Obstacles to Effective Partnership PowerPoint Learning in Strategic Alliances Knowledge Solution Handout, and Managing Virtual Teams Knowledge Solution Handout to explain any additional obstacles that have not already been considered. Open a discussion on what this suggests about developing and managing partnerships.	Obstacles to Effective Partnership PowerPoint Learning in Strategic Alliances Knowledge Solution Handout Managing Virtual Teams Knowledge Solution Handout

CHARACTERISTICS OF EFFECTIVE PARTNERSHIPS

10 mins	Use Characteristics of Effective Partnerships PowerPoint to introduce the idea that there are two broad sets of elements or characteristics that underpin effective partnerships. These are Foundation Elements and Sustaining Elements. Foundation elements are those that must be agreed at the start of a partnership. Sustaining elements are those that are needed throughout the life of the partnership. Open a discussion by asking the participants to relate the characteristics to the problems they have identified. Emphasize the importance of the partnership agreement as a way of anticipating and minimizing the risk of future problems.	Characteristics of Effective Partnerships PowerPoint

SIX PRINCIPLES FOR EFFECTIVE PARTNERSHIPS

15 mins	Use the Six Partnership Principles PowerPoint and Assessing Strategic Partnership: The Partnership Assessment Tool (see Resources section above) to introduce the six building blocks that research has shown are necessary for successful partnership. Explain that these principles can be used as a checklist, particularly at stages 3. 4 and 5 of the partnership cycle – after the business case has been made and the potential partner identified. Explain that the principles have been made into an assessment tool that is available for download.	Assessing Strategic Partnership: The Partnership Assessment Tool (see Resources) Six Partnership Principles PowerPoint

SIMPLE RULES TO MAKE PARTNERSHIPS MORE EFFECTIVE

5 mins	Use the Simple Rules to Make Partnerships More Effective PowerPoint to emphasize that it is important to consider not only the collaborative 'task' but also the collaborative process.	Simple Rules to Make Partnerships More Effective PowerPoint

CONCLUSION

2 mins	Use Key Learning Points PowerPoint to present the key learning points from the session. Remind participants that they have been considering the characteristics of effective partnerships in general. In the next session they will examine what is needed to learn effectively in partnerships.	Key Learning Points PowerPoint

The Partnership

CYCLE CARDS

Instructions for facilitator:
Cut out the six statements and stick each to a separate flipchart sheet. Stick the flipchart sheets on the wall so that the headings cannot be seen until needed.

1. Make the business case

2. Identify the partner(s)

3. Negotiate the relationship

4. Implement the partnership

5. Monitor progress and evaluate achievements

6. Terminate or renegotiate the partnership

Session 5

SESSION OVERVIEW
- The benefits of shared learning in partnerships
- Factors affecting learning in partnerships
- Understanding Motive, Means and Opportunity
- Transparency and receptivity
- The five main learning strategies
- Interorganizational learning in partnerships
- Using the MMO model to strengthen learning in partnerships

KEY LEARNING POINTS

The benefits of learning in partnerships can be significant but may be imbalanced.

The most effective partnerships are those where there is mutual learning and new knowledge creation.

Learning in an organization depends on adequate attention to motive, means and opportunity (MMO).

Learning in a partnership is dependent on each organization having high levels of transparency and receptivity.
The levels of transparency and receptivity determine the learning strategy the organization adopts. The strategy may be conscious or subconscious.

Different combinations of learning strategies in a partnership lead to very different learning outcomes.

To maximize learning in a partnership, attention must be paid to organizational and joint (partnership) MMOs.

RESOURCES

PowerPoint

Flipchart and pens

Larsson, Rikard, et al (1998) The Interorganizational Learning Dilemma: Collective Knowledge Development in Strategic Alliances, Organization Science, Vol. 9, No. 3, May-June 1998

Learning Strategies in Partnerships
HANDOUT ///

SESSION OVERVIEW		
2 mins	Introduce session overview using PowerPoint Deal with any points of clarification.	PowerPoint
BENEFITS OF SHARED LEARNING IN PARTNERSHIPS		
10 mins	Divide participants into two groups. Ask the groups to consider a partnership between ADB and a bilateral aid agency which has been developed to cofinance a major water and sanitation infrastructure project. Ask one group to brainstorm the benefits for ADB of shared learning in the partnership. Ask the other group to brainstorm the benefits for the bilateral aid agency partner of shared learning in the partnership. Ask each group to present their lists and then open a discussion comparing the lists.	Two flipcharts and marker pens.
10 mins	Use Benefits of Shared Learning PowerPoint, to introduce any benefits that have not already been noted. **Open a discussion covering the following points:** • Are the benefits different for each organization? • Are the benefits balanced?	Benefits of Shared Learning PowerPoint
5 mins	Use Learning in Partnerships PowerPoint to explain the three ways in which learning can occur in partnerships: one way, two way and knowledge creation. The most balanced and productive situation is when learning is two way and leads to new knowledge creation.	Learning in Partnerships PowerPoint

FACTORS AFFECTING LEARNING IN PARTNERSHIPS		
5 mins	Use Motive, Means and Opportunity PowerPoint to explain that learning and knowledge sharing in organizations and between organizations requires three conditions: the motive, means and opportunity. All three are necessary.	Motive, Means and Opportunity PowerPoint
	Use Factors Affecting Learning in Partnerships PowerPoint to introduce each factor. The degree to which learning will be one way, two way or create new knowledge will depend on how the factors apply to each organization in the partnership. Explain that we will now examine the two factors transparency and receptivity in more detail.	Four Factors Affecting Learning in Partnerships PowerPoint
TRANSPARENCY AND RECEPTIVITY		
10 mins	Use Factors Affecting Transparency PowerPoint to explain that each organization's willingness and ability to share with the other depends on a number of factors. Transparency, therefore, may be affected by deliberate choices and underlying organizational characteristics and culture.	Factors Affecting Transparency PowerPoint
	Use Factors Affecting Receptivity PowerPoint to explain that each organization's intent and capacity to absorb knowledge depends on a number of factors. Receptivity, may be affected by deliberate choices or underlying organizational characteristics and culture. Conclude by pointing out that the more effective an organization is at learning internally, the better it is likely to be at learning in the context of a partnership.	Factors Affecting Receptivity PowerPoint

LEARNING STRATEGIES

15 mins	Use Learning Strategies PowerPoint and Learning Strategies in Partnerships Handout to explain that each organization's strategy for learning in a partnership can be identified according to their level of receptivity and transparency. There are five broad learning strategies that an organization can use: Avoidance, Accommodation, Compromise, Competition and Collaboration. Collaboration requires high levels of both receptivity and transparency. Accommodation happens when an organization is willing to share but unable to absorb knowledge. Competition reflects an organization's enthusiasm to learn from others but unwillingness to share with them. If an organization is unwilling to learn or share, its strategy is likely to be avoidance. Finally if the organization is moderately willing to share and to learn, it's strategy is one of compromise. Point out that an organization's learning strategy may change over time. Models of negotiation between parties suggest that the parties choose either distributive bargaining (an approach which is based on the view that one party can gain only at the other party's expense; it is therefore fundamentally competitive) or Integrative bargaining (based on the view that if both parties are open with each other and work together then they can find a solution which will reconcile their respective interests). The learning strategies model recognizes that in any partnership negotiation, the approaches (integrative and distributive) are not mutually exclusive. One party may be working on integrative principles whilst the other works on distributive principles. It is important for participants to recognize that the learning strategy adopted by an organization may either be deliberately chosen or may sub-consciously emerge from the complex combination of organizational characteristics that determine its levels of receptivity and transparency. In other words, organizations do not always consciously choose a learning strategy, the strategy may reflect other choices they make.	Learning Strategies PowerPoint Learning Strategies in Partnerships Handout
10 mins	At this point participants should be encouraged to raise questions, test their understanding, and apply the model to ADB.	

OUTCOMES OF INTERORGANIZATIONAL LEARNING

10 mins	Interorganizational learning is a joint outcome of interacting organizations' choices and abilities to be more or less receptive and transparent. This is demonstrated in the Outcomes of Interorganizational Learning PowerPoint. The matrix demonstrates what happens in terms of learning when two organizations adopt each of the five learning strategies described earlier. Obviously, the most fertile and productive outcome (dark green boxes) is when both organizations pursue a collaborative strategy. In this instance there is likely to be two-way knowledge sharing and the creation of new knowledge. When one organization takes a collaborative approach and the other simply a compromise approach, new knowledge may be generated. The same is true if both take a compromise approach. However, if organization A is competitive and organization B either collaborative or accommodating, A will extract learning from B whilst not necessarily offering anything in return (orange boxes). The reverse is also true (dark blue boxes). If A accommodates and B compromises, or if A compromises whilst B is competitive then B benefits by extracting learning from A but to a more limited degree (light blue boxes). The opposite is also true (yellow boxes) when A competes and B compromises and when A compromises and B accommodates. Participants may need some time to explore this model so allow some time for pairs or triads to discuss and note any questions or comments.	Outcomes of Interorganizational Learning PowerPoint
10 mins	After answering questions, there are many discussion points that can be initiated using the Pay-Off Matrix. For example: • How does this relate to participants' experience in ADB? • Is ADB more often extracting knowledge or relinquishing knowledge? • What examples do participants have of genuine mutual collaboration leading to new knowledge creation? Conclude by emphasizing the importance of organizations aiming to maximize their transparency and receptivity so that their partnerships can be more collaborative leading to a Win-Win for both parties.	

EVOLUTION OF PARTNERSHIPS		
10 mins	Use Evolution of Partnerships PowerPoint and Learning in Strategic Alliances Knowledge Solution Handout to explain the importance of taking an evolutionary view of partnerships.	Evolution of Partnerships PowerPoint Learning in Strategic Alliances Knowledge Solution Handout
USING THE MMO MODEL FOR STRENGTHENING LEARNING IN PARTNERSHIPS		
10 mins	Use the Joint MMO for Learning in Partnership PowerPoint to explain that for learning to occur in a partnership, each organization must have its own motive, means and opportunity to learn internally, and both organizations must share a joint motive, means and opportunity to learn from each other. Shared learning in a partnership is unlikely if each partner gives insufficient attention to its own internal learning.	Joint MMO for Learning in Partnership PowerPoint
	Use Qualities Checklist for Effective Learning in Partnerships 1, 2 & 3 PowerPoints to explain what is needed in the green boxes of the Joint MMO for Learning in Partnership PowerPoint.	Qualities Checklist for Effective Learning in Partnerships 1, 2 & 3 PowerPoints
CONCLUSION		
3 mins	Use PowerPoint present the key learning points from the session.	PowerPoint

Learning Strategies

/// IN PARTNERSHIPS

Figure 1: Five Organization Learning Strategies as Defined by an Organization's Approach to Receptivity and Transparency

Each organization's strategy for learning in a partnership can be identified according to their level of receptivity and transparency. **There are five broad learning strategies that an organization can use:** Avoidance, Accommodation, Compromise, Competition and Collaboration.

Collaboration requires high levels of both receptivity and transparency. Accommodation happens when an organization is willing to share but unable to absorb knowledge. Competition reflects an organization's enthusiasm to learn from others but unwillingness to share with them. If an organization is unwilling to learn or share, its strategy is likely to be avoidance. Finally if the organization is moderately willing to share and to learn, it's strategy is one of compromise. Point out that an organization's learning strategy may change over time.

Models of negotiation between parties suggest that the parties choose either distributive bargaining (an approach which is based on the view that one party can gain only at the other party's expense; it is therefore fundamentally competitive) or Integrative bargaining (based on the view that if both parties are open with each other and work together then they can find a solution which will reconcile their respective interests). The learning strategies model recognizes that in any partnership negotiation, the approaches (integrative and distributive) are not mutually exclusive. One party may be working on integrative principles whilst the other works on distributive principles.

The learning strategy adopted by an organization may either be deliberately chosen or may sub-consciously emerge from the complex combination of organizational characteristics that determine its levels of receptivity and transparency. In other words, organizations do not always consciously choose a learning strategy, the strategy may reflect other choices they make.

Figure 2: Interorganizational Learning Outcomes Pay-off Matrix

		Organization B's Learning Strategy				
		Avoidance	Accommodation	Compromise	Competition	Collaboration
Organization A's Learning Strategy	**Avoidance**	grey	grey	grey	grey	grey
	Accommodation	grey	grey	light blue	dark blue	dark blue
	Compromise	grey	yellow	green	light blue	green
	Competition	grey	orange	yellow	grey	orange
	Collaboration	grey	orange	green	dark blue	dark green

Dark green represents high transfer of existing knowledge and creation of new knowledge for both A and B
Dark blue represents high transfer of existing knowledge from A to B
Orange represents high transfer of existing knowledge from B to A
Light blue represents low transfer of existing knowledge from A to B
Yellow represents low transfer of existing knowledge from B to A
Grey represents no transfer or creation of knowledge

Interorganizational learning is a joint outcome of interacting organizations' choices and abilities to be more or less receptive and transparent. This is demonstrated in the Outcomes of Interorganizational Learning PowerPoint. The matrix demonstrates what happens in terms of learning when two organizations adopt each of the five learning strategies described earlier. Obviously, the most fertile and productive outcome (dark green boxes) is when both organizations pursue a collaborative strategy. In this instance there is likely to be two-way knowledge sharing and the creation of new knowledge.

When one organization takes a collaborative approach and the other simply a compromise approach, new knowledge may be generated. The same is true if both take a compromise approach.

However, if organization A is competitive and organization B either collaborative or accommodating, A will extract learning from B whilst not necessarily offering anything in return (orange boxes). The reverse is also true (dark blue boxes). If A accommodates and B compromises, or if A compromises whilst B is competitive then B benefits by extracting learning from A but to a more limited degree (light blue boxes). The opposite is also true (yellow boxes) when A competes and B compromises and when A compromises and B accommodates.

Figure 3: How Motive, Means and Opportunity for Learning in Partner Organizations Relate to Joint Motive, Means and Opportunity for Learning in a Partnership.
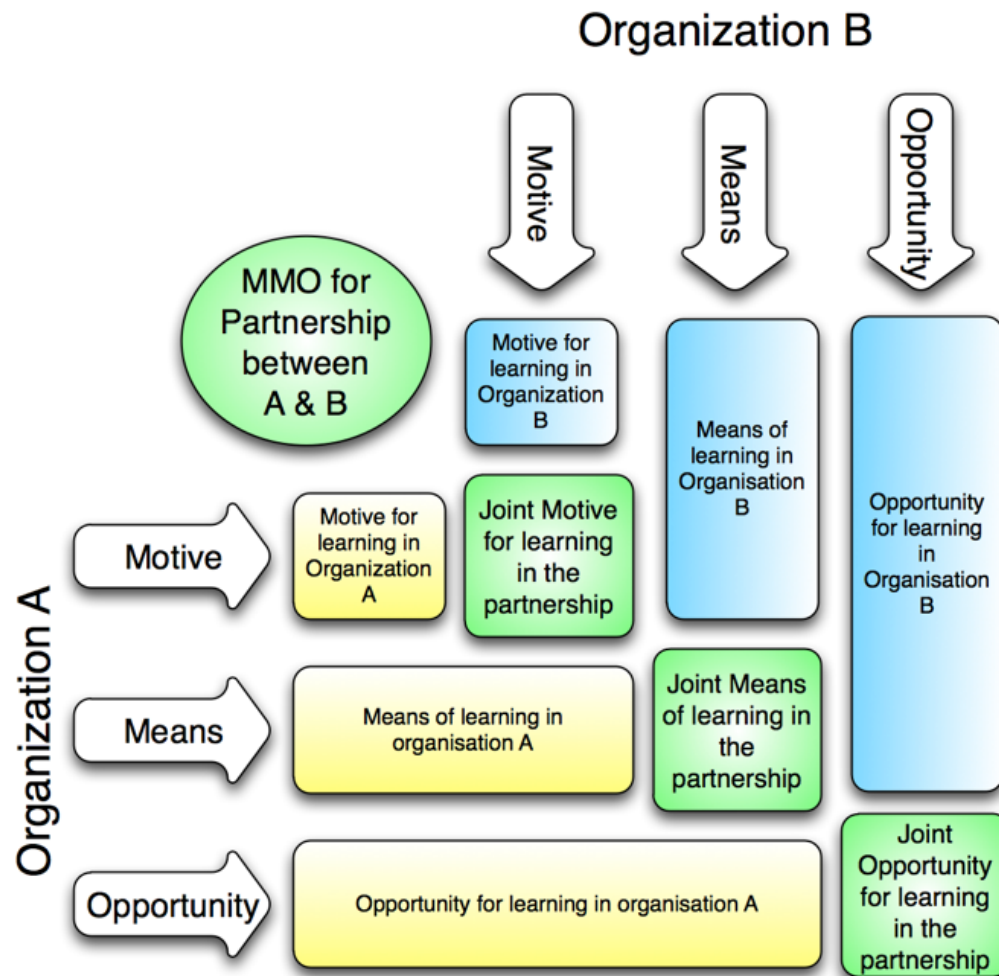
For an organization to learn, its staff needs the motive, means, and opportunity to do so. For organizations in a partnership to learn from each other, each needs the motive, means and opportunity to learn internally. They also need the motive, means and opportunity to learn from each other. Shared learning in a partnership is unlikely if each partner gives insufficient attention to its own internal learning.

Session 6

ASSESSING LEARNING POTENTIAL
IN EXISTING PARTNERSHIPS

SESSION OVERVIEW
- Introduction
- How to assess learning potential in an existing partnership - a case study

KEY LEARNING POINTS

The concepts and models introduced earlier can be used to assess learning and knowledge sharing potential in existing partnerships.

By understanding their learning strategies, organizations in an existing partnership can identify obstacles to learning and knowledge sharing.

Most of the obstacles to learning and knowledge sharing have their roots in inadequate understanding of what leverages learning in partnerships and the negotiation stage of the partnership.

RESOURCES

PowerPoint

ADB – 'Northland Development Agency' Partnership Case Study Handout – Participants MUST be sent the case study and asked to read it BEFORE the workshop. Because the case study is lengthy and detailed it is essential that it is sent out well in advance of the course so that participants read it before they arrive.

ADB-NDA Case Study worksheet

ADB-NDA Case Study Notes (These notes should be given to participants only after the second session in which the case study is discussed.)

Previously prepared table on flipchart listing the 16 'qualities' from question 1 of the ADB – 'Northland Development Agency' Partnership Case Study Handout. The numbers 1-16 representing the 'qualities' should form the rows of the table and there should be one column for each small group so that each group can list and compare their scores for each quality.

SESSION OVERVIEW		
5 mins	Introduce session overview using PowerPoint	PowerPoint
	Deal with any points of clarification.	
ADB-NDA CASE STUDY		
5 mins	In this session, participants will be given an opportunity to apply the concepts introduced earlier in the course to a real life case study of an ADB partnership. Introduce the case study by reading out the 'Introduction to Case Study' section. Explain that participants will be divided into small groups and they should refer to the ADB-NDA Case Study worksheet. Each group should discuss and note their answers on the flipchart sheet. At this stage they should answer ONLY questions 1, 2 and 3.	ADB-Northland Development Agency Case Study Handout ADB-NDA Case Study worksheet
30 mins	Divide participants into working groups of no more than four individuals. Provide each group with flipchart papers and pens to note their answers to the questions. Ask each group to agree who will report back each question. A different member should agree to report back each question. Participants work in small groups.	Flipchart paper and pens for each group.
30 mins	When the agreed time is up bring the groups together. Ask each group to write their answers to question 1 on the table you prepared on flipchart. Open a discussion comparing their scores. Ask the groups to explain their scoring, especially where there are major differences. Refer to the ADB-NDA Case Study Notes Handout (but do NOT distribute the handout at this stage).	Prepared table on flipchart. ADB-NDA Case Study Notes Handout

20 mins	Ask one of the groups to report their answer and lead a discussion of all the answers to question 2. Explore the similarities and differences between each group's assessments. Refer to the ADB-NDA Case Study Notes Handout. Ask another group to report their answer and lead a discussion of all the answers to question 3. Explore the similarities and differences between each group's assessments. Refer to the ADB-NDA Case Study Notes Handout. Now open a discussion, identifying what participants see as the main obstacles to learning and knowledge sharing in the case study example. At this stage focus on a thorough identification of the obstacles as the course will examine how to overcome the obstacles on day two. Acknowledge that although the case study partnership was not designed primarily for mutual knowledge sharing, much more could have been done to make this possible. Explain that participants will be examining practical ways of leveraging learning in partnerships on day two of the course. They will have the opportunity to apply these ideas to this case study example in a later session.	
CONCLUSION		
5 mins	Use PowerPoint present the key learning points from the session.	PowerPoint

ADB-'Northland Development Agency'
PARTNERSHIP CASE STUDY ///////////////////////////////

INTRODUCTION TO CASE STUDY

This case study is based on a real-life partnership between ADB and another institution (the name of the other institution and the dates have been changed to maintain anonymity). The case study uses the results of an independent review carried out to examine the partnership relationship between the two organizations. Although the review examined all aspects of the partnership, this case study focuses on the knowledge sharing and learning dimension, providing other information only for the purpose of context setting.

Section 1 of this case study introduces the two institutional partners: the Asian Development Bank and the Northland Development Agency (NDA) and the nature of their partnership. Section 2 summarizes the key findings of the independent review of the partnership, the ten recommendations made and the management response to those ten recommendations. In Section 3 you are invited to explain the underlying reasons for one of the key findings of the review, namely the limited success of the knowledge-sharing dimension of the partnership. You are also asked to respond to the recommendations made.

Text in italics is quoted directly from the report of the independent review (though dates have been changed to preserve anonymity).

1. BACKGROUND TO THE PARTNERSHIP

1.1 The Asian Development Bank (ADB)

ADB is a multilateral international development finance institution whose mission is to help its developing member countries reduce poverty and improve the quality of life of people in Asia. Headquartered in Manila and established in 1966, ADB is owned and financed by its 67 members, of which 48 are from the region and 19 are from other parts of the globe. Under ADB's Strategy 2020, a long-term strategic framework adopted in 2008, ADB follows three complementary strategic agendas: inclusive growth, environmentally sustainable growth and regional integration.

ADB provides various forms of assistance to governments and private enterprises based on the priorities of its developing member countries. ADB's primary instruments are policy dialogue, loans, grants, guarantees, equity investments, and technical assistance. In 2010, ADB's total assistance amounted to $17.51 billion. Loans worth $11.46 billion were approved for 118 projects. Grants of $981.7 million financed 40 grant projects. Five guarantees for $982.3 million and $243 million for eight equity investments were also approved. Technical assistance, which is used to prepare and implement projects and support advisory and regional activities, amounted to $175.5 million for 243 projects. In addition, $3.67 billion in direct value-added loan, grant, and technical assistance cofinancing for 156 projects was generated.

1.2 The Northland Development Agency (NDA)

Within the country of Northland's official development aid system, NDA is the primary organization for bilateral Northland untied aid. NDA has almost 1500 staff. Funding is provided on an untied basis in the form of grants, loans (soft to market-based terms), guarantees or equity participation.

In the late 1980s, Sub-Sahara Africa was NDA's main beneficiary, receiving 40% of its funding commitments. The Mediterranean Basin countries, including North Africa, received 25% of commitments and Asian countries received 25%. While NDA strategy in Asia initially focused on Millennium Development Goals (MDG)-related areas, such as rural development, human development and water resource management. NDA is now expanding to emerging countries in Asia with the aim of supporting "green and inclusive growth" and the protection of Global Public Goods. It should be noted that in 2009 about 70% of total commitments in Asia were still made through sovereign loans, with only 12% in the form of non-sovereign subsidized loans and the remainder being split between market-rate loans and grants, the latter showing a decreasing trend.

1.3 Timeline of Partnership

The partnership between ADB and NDA followed the timeline below:

1994	Collaborative activities between ADB and NDA begin.
2002	Memorandum of Understanding on Establishing Operational Arrangements signed between ADB and NDA
2005	Evaluation of the ADB-NDA Partnership
2005	First high level retreat for the ADB-NDA Partnership
2006	Second high level retreat for the ADB-NDA Partnership
2008	Third high level retreat for the ADB-NDA Partnership

2008	Terms of Reference prepared for the Strategic Review of the ADB-NDA Partnership
2008	Independent review of ADB-NDA Partnership
2009	Report of the Strategic Review of the ADB-NDA Partnership presented
2009	Fourth high level retreat of the ADB-NDA Partnership. Partnership Framework Agreement signed between ADB and NDA for the period 2010-2016
2010	ADB-NDA fifth high level retreat discusses the follow-up on the independent evaluation of the ADB-NDA partnership.

1.4 Partnership Memorandum of Understanding (MoU)

In 2002, the ADB and NDA signed a Memorandum of Understanding on Establishing Operational Arrangements. The document was very brief (two pages) and listed the areas for operational arrangements as follows:

"Each party will make every effort to strengthen between the institutions co-operation, in particular in matters relating to:
a) *Identification of projects that qualify for financing both by ADB and NDA*
b) *Joint appraisal and financing of projects recognized as feasible within the guidelines of both institutions.*
c) *Follow-up and review of jointly financed projects and sector interventions.*
d) *Exchange of visits between ADB and NDA to discuss matters of common interest*
e) *Regular exchange of information, documents, and publications being produced by the institutions (subject to their respective confidentiality procedures).*
f) *Training of public and private sector professional staff from relevant DMCs.*
g) *Exchange of professional staff between the institutions whenever appropriate."*

2. INDEPENDENT REVIEW OF THE ADB-NDA PARTNERSHIP

In 2008 an independent review of the NDA-ADB partnership was commissioned by NDA. The following excerpt from the terms of reference describes the objectives of the Review.

2.1 Review Terms of Reference - Objectives

Objective 1. *Take stock of the ADB-NDA partnership, by updating the evaluation carried out in 2005 by assessing the outcomes of their cooperation. The consultant will extend the study to the three following areas:*

- *Institutional cooperation (MoUs, retreats, high-level meetings, secondment, other joint activities). The consultant will assess how the institutional dialogue evolved during the recent period, which kind of institutional arrangements have been set up, how they worked and to what extent they impacted the operational activities;*

- *Co-financing activities (volume, sectors, countries and regions, project processing and monitoring performance, financial (lending and non-lending) products, aid management efficiency, results management). In addition to an overall ADB-AFD cofinancing portfolio performance, the consultant will conduct a detailed review on a sample of 6 co-financing arrangements representing around 20% of the portfolio of public sector projects: this review focused on the public sector projects will (i) compare ADB and AFD respective processing and implementation processes, (ii) assess the project management performance and results, (iii) sum up the lessons learned (strengths and weaknesses, pending issues, etc.) from these cofinancing arrangements;*

- ***Knowledge-based activities, including research and project evaluation. The consultant will inventory the joint activities in this area. Beyond this cooperation, the consultant will examine whether and how NDA and ADB use or take advantage of knowledge products coming from the partner institution.*** *[Emphasis added for this case study]*

Objective 2. *From the assessment above, analyse the ways to strengthen ADB-NDA partnership and address global issues (aid effectiveness, strategic priorities, areas of mutual interest, partnership monitoring process...).*

Objective 3. *Outline the cooperation challenges and prospects by:*

- *Summing up the strengths and the limitations of ADB-NDA partnership, as reflected by the partnership assessment, and recommending ways of improving the current cooperation;*

- *Identifying the global and strategic challenges that ADB and NDA should address by intensifying their partnership for their mutual interest, and outlining the opportunities in this respect.*
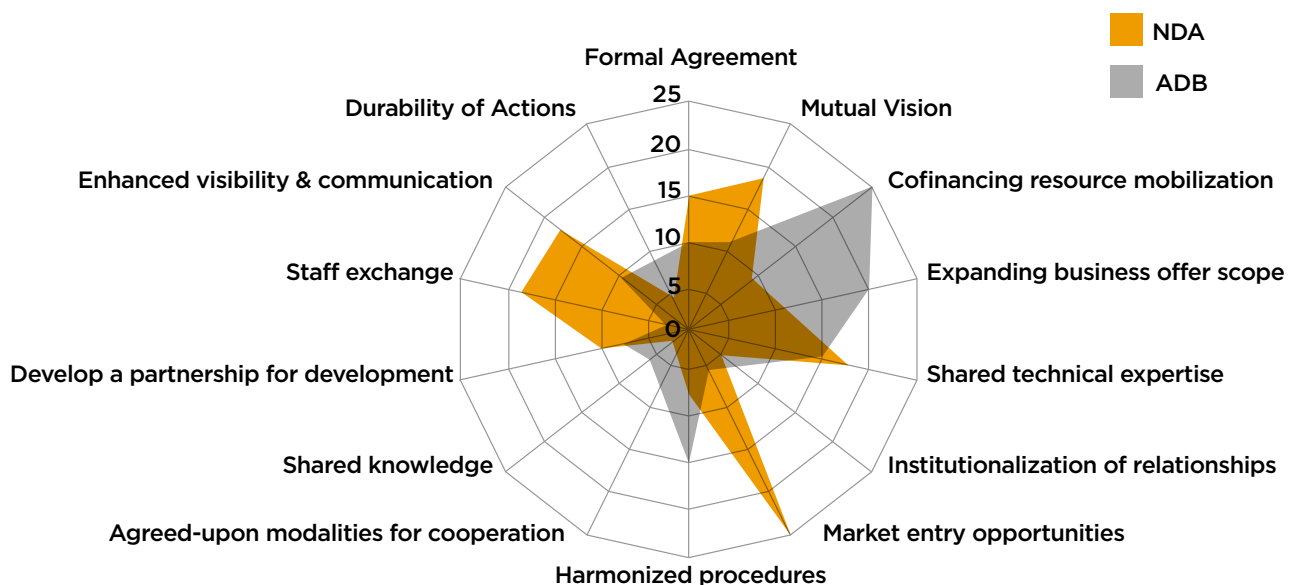
2.2 Main Findings of the 2008 Review

Overall, the review concluded, the partnership between ADB and NDA had been relatively successful in the area of co-financing projects but was in need of greater conceptual clarity as the partners were found to have different interpretations of the purposes of the partnership and, therefore, different degrees of commitment to the various elements of the partnership.

The following findings – that relate specifically to knowledge sharing and knowledge management - were noted in the review report:

"There has been limited success in implementing some areas of the partnership, in particular in knowledge management, research and analytical work. However, we could not identify traces of joint systematic knowledge management actions taken. Apart from the Retreats and the evaluation work performed in 2005, NDA and ADB staff rarely identified and shared good practices or lessons learned; formally documented ideas, information or experiences that could be useful to others; or actively shared their knowledge, except on specific co-financed projects. We also noted that a more appropriate monitoring and accountability system was needed to ensure that the reporting of performance will be done on a regular basis. With regard to research, we noted that, apart from good intentions, the partners have implemented no particular actions."

The following diagram summarizes the assessment of the two organizations concerning 14 dimensions of the partnership. The orange scores are those of NDA, the transparent grey scores are those of ADB.

2.2.1 THE PARTNERS HAVE THE INTENTION TO SHARE KNOWLEDGE BASED MANAGEMENT ACTIONS, BUT THE AGENDA FOR THIS DOES NOT YET EXIST

We could not identify traces of joint systematic knowledge management actions in the NDA-ADB partnership. Apart from the Retreats and an evaluation work performed in 2005, NDA and ADB staff rarely identified and shared good practices or lessons learned. Nor did they formally document ideas, information or experience that could be useful to others or actively share their knowledge, except on specific co-financed projects. While there is some knowledge sharing between the two institutions, it is largely ad hoc in nature. We noted an absence of any knowledge management tool at the level of country operations.

An initiative that we found commendable at ADB is the "Knowledge Solutions" showcase: a paper-based series of short documents providing guidelines on a variety of topics in order to provide support to ADB staff and partners. This consists in sharing experiences, guidelines and lessons learned. In particular, we noted the publication entitled "Creating and Running Partnerships", which highlights key drivers of success and guidelines for managers.

2.2.2 JOINT RESEARCH PROJECTS OFFER THE POTENTIAL FOR ENHANCED COLLABORATION BUT OPPORTUNITIES HAVE NOT YET BEEN EXPLOITED

On the research side, we noted from the executive summaries of past Retreats that research has been considered important. Both NDA and ADB having strong departments in this area. For instance, at the Retreat of 2008, ADB and NDA agreed to initiate cooperation in knowledge management and research with the aim of developing joint activities, climate change being a theme of common interest. ADB research centered in the following departments and offices: 1) Economics and Research Department; 2) Regional and Sustainable Development Department; Office of Regional Economic Integration; and the ADB Institute in Tokyo. Research MoUs between ADB and other institutions have also been signed (Inter-American Development Bank [IADB], World Bank, Oganisation for Economic Co-operation and Development [OECD], International Monetary Fund [IMF], etc.). At NDA, the Research and Evaluation Department is composed of the following units: Economic and Social Research; Macroeconomic Analysis and Country Risk; Evaluation and Knowledge Capitalization; and Support to Knowledge Management.

For ADB, research is seen to be a public good, one that also has networking advantages. Therefore, it is most beneficial when acquired from the greatest number of sources and disseminated to the widest possible audience. Most of the research capabilities of ADB are located in-house. For instance, the Economics and Research Department has a fulltime staff of around 30 professionals, most at the Doctor of Philosophy (PhD) level, and around 30 support staff. But NDA also outsources research to specialized centers and universities. A meeting with the ADB Economics and Research Department revealed the following research priorities: inclusive growth; diagnosing critical constraints to growth; economics of climate change and low-carbon growth; commodities, energy and global economic monitoring; impact assessments; achieving more balanced growth; pursuing fiscal and debt sustainability; and poverty monitoring. Knowledge-based work within the partnership could be explored in these areas.… We recommend that NDA and ADB engage in more substantial knowledge and research activities in the future.

2.2.3 PAST EVALUATION ANALYSIS HAS NOT BEEN FULLY INTEGRATED INTO THE DECISION-MAKING PROCESS

Monitoring and evaluation (M&E) functions are essential elements of the financial management cycle of any partnership. In particular, the purpose of the evaluation is to provide the various stakeholders with an independent and accountable assessment of past and current cooperation with each partner. The evaluation is the necessary tool to monitor progress toward key goals and to better understand the constraints hampering progress and, if needed, to make specific recommendations for corrective measures to be implemented.

Due to limited management resources and budgets dedicated to M&E, the evaluation function has evolved somewhat erratically within the NDA-ADB partnership. We found traces of only one evaluation, commissioned by NDA in 2006, and covering the period 1996-2005. Not surprisingly, the linkages between findings and recommendations from the 2005 evaluation have not been systematically visible in practice during the last few years. Although a few recommendations proposed in 2005 have received attention (i.e. high-level meetings and retreats), the majority of these have not been implemented (information-sharing at both HQ and country levels, joint planning documents, knowledge management, joint evaluations).

As a result, the partnership has not been able to capitalize on M&E findings and analyses. When asked about M&E, many interviewees pointed to the scarce resources dedicated to this field, the non-availability of trained personnel that could inform the M&E process and the limited number of co-financing arrangements carried out in previous years. The data-gathering and analysis activities regarding delivery and cost-effectiveness of M&E for the partnership was thus considered by many to be too costly and not necessary as a regular activity.

Now that the partnership is attaining a critical mass, with an expansion being considered, we recommend establishing an evaluation system to ensure the effective functioning of M&E. Before doing so, it is important for the partners to identify the objectives of introducing such a system. The evaluation departments of both NDA and ADB have the resources and the expertise to develop and render operational an effective M&E system.

2.2.4 AHEAD OF THE CURVE: BUILDING SCENARIO-PLANNING CAPACITY TO CREATE A DIALOGUE BETWEEN RISKS AND OPPORTUNITIES IN SPECIFIC AREAS

During interviews at NDA and ADB, a clear need was expressed to reinforce the strategic planning and analysis function, particularly in the fields of energy and environment. In these fields, which will face many challenges in coming years, forward thinking is necessary.

To accomplish this, scenario planning should be prioritized to consider a wide range of possibilities, trends and uncertainties (i.e. in climate change, migration, renewable energy). This would partially compensate for the usual errors in decision-making – overconfidence about the medium-term future and tunnel vision. In specific areas, the partnership should utilize scenario planning to simplify the avalanche of data and focus on a limited number of alternative activities. This would also allow the partners to think systematically about complexity, uncertainty and interdependence in turbulent times. One senior staff member asserted that "achieving believability and action in climate change requires a depth of insight and understanding that is rare today within the organization. It is important for all of us to develop an internally consistent view of what the future might turn out to be in Asia on climate change – not a forecast, but possible future outcomes."

In conclusion, we recommend that the partners develop a common approach to specific game-changing events in Asia that could occur over the medium and long term. When upheavals occur, the rules of the game that were previously in place may no longer apply. This is why there is a need to anticipate major shifts. In practical terms, the partners could decide to embark on a joint scenario-planning exercise, for example in the area of climate change, energy or urban development. Taking such a long view will constitute a more proactive and anticipatory approach to address deep-seated problems, to anticipate challenges and opportunities at the level of the partnership and to consider the long-term effects and potential unintended consequences of actions that might well occur in the near, medium and longer terms.

2.3 Main Recommendations of the Review

The following recommendations were made in the Review by the independent evaluation team. Recommendation 6 focuses on knowledge management (and, hence, is included in full). Summaries of the other recommendations are included to provide an overview of the evaluators' overall assessment of the partnership.

2.3.1 RECOMMENDATION 1: RE-DEFINING THE MISSION AND SCOPE OF THE PARTNERSHIP

Before embarking upon major new areas of collaboration, NDA and ADB should undertake an internal consultation to seek agreement on a strategic vision for the future that would position the partnership at the centre of specific priorities, and which would provide credible information on the basis of upstream analytical approaches.

2.3.2 RECOMMENDATION 2: STREAMLINING THE BUSINESS PORTFOLIOS IN A MEDIUM-TERM STRATEGY

We recommend that the partners streamline their cofinancing strategy over the medium term to avoid having a spread of projects across too many sectors and sub-sectors.

2.3.3 RECOMMENDATION 3: MAPPING POTENTIAL PROJECTS IN SELECTED AREAS OVER THE NEXT THREE YEARS

We recommend developing a comprehensive mapping of potential areas of joint intervention according to a taxonomy to be agreed on but oriented towards the practical identification of projects that could be undertaken over the next three years.

2.3.4 RECOMMENDATION 4: ENSURING APPLICATION OF PROCESSES TO BETTER ALIGN PROCEDURES AT ALL LEVELS OF THE PARTNERSHIP

We recommend that the partners begin considering how to better align procedures and develop awareness of new ADB processes and instruments in order to seek synergies and more efficient implementation.

2.3.5 RECOMMENDATION 5: STRENGTHENING ACCOUNTABILITY AND MONITORING OF CO-FINANCING AND OTHER JOINT ACTIONS

It is important to have a systematic tool for reporting on cofinancing arrangements as well as any other joint initiatives. Co-financing strategies should be evidence-based, results oriented, cost-effective and built on transparent relationships between providers of assistance and beneficiary countries. To achieve this outcome, an MIS tool is required.

2.3.6 RECOMMENDATION 6: CREATING A CONCRETE KNOWLEDGE MANAGEMENT AGENDA, INCLUDING STRATEGIC SCENARIO PLANNING, EVALUATION AND SPECIFIC RESEARCH

"We could not identify joint systematic knowledge management and research actions within the NDA-ABD partnership. Apart from the Retreats and evaluation work performed in 2005, NDA and ADB staff rarely identified and shared good practices or lessons learned. It is important to expand areas of collaboration beyond co-financing (which has been the major tool to implement joint activities) and to put in place knowledge-management and to research joint initiatives that will add value to the partnership.

"With respect to the preceding paragraph, we recommend addressing the issue of knowledge management, research and evaluation in a more systematic manner with the objective to identify a very limited number of joint projects that would allow a sustainable partnership to be developed in these areas. It is important to promote joint research (operational, thematic or sectoral) and the development of knowledge products. During our interviews, a few topics were mentioned by both NDA and ADB staff: climate adaptation and resilience (with little research expertise at NDA presently); migration; growth strategies; clean energy; and impact evaluation.

"Evaluation should become a regular feature of the partnership to collect performance information to highlight lessons learned and best practices in selected areas. It can also be used as critical evidence to develop program areas of mutual interest. We also recommend performing a joint evaluation of selected co-financed projects. Evaluation offices of both NDA and ADB could conduct these evaluations. For the future evaluation of the partnership, we also recommend a fully shared exercise, from the drafting of the terms of reference to the financing of the evaluation itself.

"Finally, we recommend developing a scenario-planning agenda with the objective of developing a limited set of structured scenarios on specific topics (climate change, energy, urban development). In doing so, the partners could acquire common knowledge in the selected areas, highlight driving forces behind the issues under study, develop systemic analysis of critical variables at play and draw on specific NDA and ADB expertise to compile a unique set of data and analysis to reflect on the way forward for the partnership in Asia."

2.3.7 RECOMMENDATION 7: INCREASING THE OVERALL VISIBILITY OF THE PARTNERSHIP

We recommend developing a more systematic communication campaign at both HQs and on the ground to increase the visibility of the partnership.

2.3.8 RECOMMENDATION 8: RE-INVENTING THE RETREAT CONCEPT

We recommend reconsidering the Retreat concept and to make it oriented In sum, we recommend using the Retreat to address concerns related to the performance of the partnership.

2.3.9 RECOMMENDATION 9: OPTIMIZING THE STAFF EXCHANGES BETWEEN THE TWO ORGANIZATIONS

We recommend the following: 1) consider re-allocating the NDA secondee to a new sector within NDA, perhaps non sovereign operations or the environment. In doing so, NDA would seek to bring strong sectoral expertise to the ADB in order to develop a specific business line of co-financed projects; 2) a staff exchange from ADB to NDA has to be secured to ensure good coordination between the organizations.

2.3.10 RECOMMENDATION 10: RE-INSTITUTIONALIZING THE PARTNERSHIP TO ENSURE LONG-TERM DURABILITY

The renewal of the MoU for the period 2009-2014 represents a major milestone. Both organizations feel the need to deepen the partnership. In particular, the new Partnership Framework Agreement represents an opportunity to explore new areas of convergence, notably private sector and non-sovereign financing; to expand beyond the 'traditional' geographical areas of collaboration; to expand areas of collaboration beyond co-financing (which has been the major tool to implement joint activities).

To re-emphasize, we recommend that both NDA and ADB agree upon the modalities for better cooperation.

2.4 Management Response to Independent Review

During their fourth high level retreat, the two institutions discussed the findings and recommendations of the independent Review. Recommendations 1, 5, 6, 7, 8, 9, and 10 were accepted fully. Recommendations 2, 3, and 4 were accepted though in some cases the issues raised had already been addressed.

3. CASE STUDY QUESTIONS

1. Conduct your own assessment of the partnership using the following table based on the Qualities Checklist for Effective Learning in Partnerships and score each of the factors out of 5 (where 5 is fully met and 0 is not met).

Qualities	Score	Notes
1. The partnership has a solid base of joint commitment and understanding		
2. Each partner has clearly identified its intended benefits from the partnership		
3. There is trust between the partners.		
4. Each partner values the other partner's knowledge		
5. Knowledge sharing and mutual learning is an explicit goal of the partnership (i.e. there is a shared learning agenda).		

Qualities	Score	Notes
6. There is a clear and appropriately detailed plan for achieving the goals of the partnership.		
7. Sufficient and appropriate resources are committed from the partners for achieving the goals of the partnerships.		
8. The partnership has an appropriate level of formality.		
9. The partnership has good leadership.		
10. There is alignment between the organizational cultures of the partners.		
11. The partnership has clear and effective lines of accountability.		
12. Both partners have an in-depth understanding of models and tools for learning and knowledge sharing.		
13. Accurate and appropriate indicators are used to evaluate and improve the success and progress of the partnership.		
14. Partners regularly communicate in a productive and mutually supportive way.		
15. Tools and mechanisms are being used in practice to surface, share, and generate new knowledge (e.g. joint After Action Reviews, meetings, workshops, seminars, retreats, etc.)		
16. Learning and knowledge sharing are integrated in the partnership management cycle.		

2. What Learning Strategy do you think each organization was using? What reasons can you suggest for each organization's choice of strategy?

3. Plot the relationship between the two organizations using the *Outcomes of Interorganizational Learning – Pay-Off Matrix.* What learning outcome is predicted from this relationship? How closely does the actual outcome compare with the predicted outcome of this combination?

In the light of your growing understanding of good learning and knowledge sharing practices in partnerships:

4. What could each organization do to increase its transparency and receptivity?

5. What practical action could be taken by the organizations to respond to the recommendations in section 2.3.6 above? Specifically, what could be done to (a) strengthen formal and informal knowledge connections between the two institutions?; and (b) encourage a learning-focused approach to evaluation between the two institutions?

6. A new Partnership Framework Agreement is about to be prepared. Identify three key issues to agree in the Agreement to strengthen knowledge sharing and learning between ADB and NDA in the future?

ADB-NDA Case Study

WORKSHEET ///

QUESTION 1

Conduct your own assessment of the partnership using the Qualities Checklist for Effective Learning in Partnerships and score each of the factors out of 5 (where 5 is fully met and 0 is not met).

Qualities	Score	Notes
1. The partnership has a solid base of joint commitment and understanding		
2. Each partner has clearly identified its intended benefits from the partnership		
3. There is trust between the partners.		
4. Each partner values the other partner's knowledge		
5. Knowledge sharing and mutual learning is an explicit goal of the partnership (i.e. there is a shared learning agenda).		
6. There is a clear and appropriately detailed plan for achieving the goals of the partnership.		
7. Sufficient and appropriate resources are committed from the partners for achieving the goals of the partnerships.		
8. The partnership has an appropriate level of formality.		
9. The partnership has good leadership.		
10. There is alignment between the organizational cultures of the partners.		
11. The partnership has clear and effective lines of accountability.		

Qualities	Score	Notes
12. Both partners have an in-depth understanding of models and tools for learning and knowledge sharing.		
13. Accurate and appropriate indicators are used to evaluate and improve the success and progress of the partnership.		
14. Partners regularly communicate in a productive and mutually supportive way.		
15. Tools and mechanisms are being used in practice to surface, share, and generate new knowledge (e.g. joint After Action Reviews, meetings, workshops, seminars, retreats, etc.)		
16. Learning and knowledge sharing are integrated in the partnership management cycle.		

QUESTION 2
What Learning Strategy do you think each organization was using? What reasons can you suggest for each organization's choice of strategy?

QUESTION 3
Plot the relationship between the two organizations using the Outcomes of Interorganizational Learning – Pay-Off Matrix. How does the actual outcome compare with the predicted outcome of this relationship?

QUESTION 4
What could each organization do to increase its transparency and receptivity?

QUESTION 5
What practical action could be taken by the institutions to respond to the recommendations in section 2.3.6? Specifically, what could be done to (a) strengthen formal and informal knowledge connections between the two institutions?; and (b) encourage a learning-focused approach to evaluation between the two institutions?

QUESTION 6
A new Partnership Framework Agreement is about to be prepared. What could be included in the Agreement to strengthen knowledge sharing and learning between ADB and NDA in the future?

ADB-NDA Case Study
NOTES

> These notes should be given to participants only after the second session in which the case study is discussed.

QUESTION 1

Conduct your own assessment of the partnership using the Qualities Checklist for Effective Learning in Partnerships and score each of the factors out of 5 (where 5 is fully met and 0 is not met).

Qualities	Score	Notes
1. The partnership has a solid base of joint commitment and understanding	2	The original MoU was very brief and subsequent joint working focused mainly on co-financing.
2. Each partner has clearly identified its intended benefits from the partnership	2	The original MoU was vague and there is little evidence that the partners looked further than co-financing. If they had other benefits in mind, they were not clearly articulated.
3. There is trust between the partners.	3	There is enough trust to make a joint review possible but not high levels.
4. Each partner values the other partner's knowledge	2	There is little evidence that this is the case. NDA seems to value ADB's knowledge more than ADB values NDA's.
5. Knowledge sharing and mutual learning is an explicit goal of the partnership (i.e. there is a shared learning agenda).	2	In the original MoU this was mentioned but in terms of means (exchange visits, exchange of information, and training) and not intended outcomes. There is no shared learning agenda.
6. There is a clear and appropriately detailed plan for achieving the goals of the partnership.	3	De facto in terms of co-financing projects but absent in terms of other objectives.

Qualities	Score	Notes
7. Sufficient and appropriate resources are committed from the partners for achieving the goals of the partnerships.	3	For co-financing of projects, yes. For other objectives, no.
8. The partnership has an appropriate level of formality.	3	A more detailed MoU would have provided greater clarity.
9. The partnership has good leadership.	2	It is not clear who actively manages the partnership in each organization.
10. There is alignment between the organizational cultures of the partners.	2	There is little evidence of this. NDA seems more adaptable and less formal than ADB.
11. The partnership has clear and effective lines of accountability.	2	There is little evidence of this.
12. Both partners have an in-depth understanding of models and tools for learning and knowledge sharing.	3	This is true of ADB through its Knowledge Management Center (though apparently not of those involved in the partnership work itself). Insufficient evidence to say whether NDA has this understanding.
13. Accurate and appropriate indicators are used to evaluate and improve the success and progress of the partnership.	2	Apart from the review, there had apparently been little or no monitoring and evaluation of the partnership.
14. Partners regularly communicate in a productive and mutually supportive way.	2	Very little evidence of this apart from retreats that have been formal rather than supportive.
15. Tools and mechanisms are being used in practice to surface, share, and generate new knowledge (e.g. joint After Action Reviews, meetings, workshops, seminars, retreats, etc.)	1	Almost no evidence of this. The review itself is exceptional in taking an in-depth look at the partnership.
16. Learning and knowledge sharing are integrated in the partnership management cycle.	1	Almost no evidence of this.

QUESTION 2
What Learning Strategy do you think each organization was using? What reasons can you suggest for each organization's choice of strategy?

In the case of ADB, the strategy appears to be one of Avoidance (low receptivity and low transparency). In the case of NDA, the strategy is low/medium receptivity and low/medium transparency, hence Avoidance or Compromise.

It is unlikely that the organizations made a conscious choice of their learning strategies. The reasons for the 'de facto' choices may be that the focus of the partnership in the early stages was mainly on co-financing so mutual learning was overlooked (particularly by ADB) and then became 'undiscussable' and hence something to be avoided. The original agreement was vague in every respect and although it mentioned exchange visits and sharing information this was never made specific enough to become an objective that could be monitored. It may also be that because little was done to develop trust, each organization was unsure about how transparent it could reasonably be and whether learning based on mistakes would be dealt with confidentially.

QUESTION 3
Plot the relationship between the two organizations using the Outcomes of Interorganizational Learning – Pay-Off Matrix. How does the actual outcome compare with the predicted outcome of this relationship?

This is not a fruitful combination for knowledge sharing and mutual learning because no meaningful learning can be expected as an outcome. This is consistent with the findings of the partnership review.

QUESTION 4
What could each organization do to increase its transparency and receptivity?

To increase transparency:

- Identify areas of tacit knowledge that the partner may be interested in (what our organization is good at but may take for granted).
- Establish a wide range connections at different levels for sharing knowledge.
- Share documentation.
- Invite partner staff to visit.
- Invite partners to joint knowledge marketplaces.

To increase receptivity:

- Identify questions (a learning agenda) with which our organization would value assistance and share these with partner.
- Understand and value the partner's areas of expertise
- Change mindset!
- Visit partner organization.

QUESTION 5

What practical action could be taken by the institutions to respond to the recommendations in section 2.3.6 above? Specifically, what could be done to (a) strengthen formal and informal knowledge connections between the two institutions?; and (b) encourage a learning-focused approach to evaluation between the two institutions?

(a) strengthen formal and informal knowledge connections between the two institutions?

- Create joint teams to address questions of interest to both partners
- Hold regular After Action Reviews involving relevant staff from both organizations
- Set up online communities open to staff of both organizations
- Agree a range of knowledge products and produce these jointly
- Create staff profile pages shared between both organizations
- Learn about the partner's culture and customs.
- Hold regular meetings, seminars, and workshops.
- Provide the staff of each organization with ADB's Knowledge Solutions and ask them to identify and introduce those that would be most useful.

(b) encourage a learning-focused approach to evaluation between the two institutions?

- Use Critical Incident Technique to create a culture of joint reflection
- Jointly identify questions for evaluation ToR.
- Use (or develop) the partnership 'spider diagram' from the Review to assess the evolution of the partnership over time.
- Require joint management responses to evaluations.
- Hold workshops to discuss evaluation findings.

QUESTION 6

A new Partnership Framework Agreement is about to be prepared. What could be included in the Agreement to strengthen knowledge sharing and learning between ADB and NDA in the future?

In addition to the points raised in the answers to questions 3 and 4,

- Clear purpose or goal (including a learning agenda).
- Roles and responsibilities of each partner (particularly partnership coordinators and organization leaders).
- Principles on which the partnership is based.
- An assessment of each partner's relevant knowledge and expertise.
- Clarity about partnership level, legal basis and joint activities.
- Clarity about processes for collaboration.
- Clarity about processes for knowledge generation and exchange.
- Mechanisms for dispute resolution.
- Clarity about monitoring and evaluation systems and procedures.

Session 7
REFLECTION ON DAY ONE ///

SESSION OVERVIEW
- Participants reflect on the day's program in small groups.
- Representatives from each small group give feedback from their group to the facilitator.

KEY LEARNING POINTS
An understanding of colleagues' views of the first day of the course. A mechanism for gathering feedback during an event lasting more than one day.

RESOURCES
PowerPoint

REFLECTIONS ON DAY ONE		
5 mins	Ask participants to form small groups of no more than five participants. Groups should be approximately the same size. Ask each group to agree a representative who will provide feedback to the facilitator. Using PowerPoint brief the groups about their task which is to discuss the following questions: • What went well today? • What did not go well? • Suggestions for Day Two?	PowerPoint
15 mins	Small groups discuss the questions.	
10 mins	Convene a meeting of the group representatives and note their feedback.	

SESSION OVERVIEW
- Energizer to re-connect people to the concepts introduced on Day One
- Feedback on the small group feedback from Day One
- Introduction to the program for Day Two

KEY LEARNING POINTS
Reminder of some of the concepts introduced on Day One

RESOURCES
Facilitator's notes on feedback from groups on Day One

Word Mime Cards (prepared in advance)

Flipchart and tape or BluTack

Small gifts such as fruit or candy

WELCOME		
5 mins	Welcome participants and explain that in this session we will • start with an energizer • followed by feedback on yesterday's feedback • then an overview of the day's program	
ENERGIZER – WORD MIME		
15 mins	Use a previously prepare set of Word Mime Cards Divide participants into groups of up to six. Ask participants to place one chair for each group in an arc about one meter from the front of a flipchart stand. The chairs should be about one meter apart.	Word Mime Cards Glue stick

	Explain that each group should select one member to sit on their group's chair with their back to the flipchart.	
	Explain that those sitting should not look at the flipchart. Stick one of the Word Mime Cards to the flipchart. Explain that the person sitting must try to guess what word is on the card by watching the other members of their team acting out what is written on the card. The group members are not allowed to say or write anything and the person sitting must not look round to see what is on the card on the flipchart.	
	The first individual to correctly guess the word gets a point for their group. Ask for a new volunteer from each group to sit on the chair. Stick the next word on the flipchart and repeat the process with a new member of each team until all the words have been used. If the teams are small, some members may have more than one turn.	
	The winning group should be given a round of applause (or small gifts such as fruit or candy if you have them)	

FEEDBACK ON THE FEEDBACK

5 mins	Present summarized feedback on the questions in the group reviews held at the end of Day One. • What went well today? • What did not go well? • Suggestions for Day Two?	Facilitator's notes on feedback from groups on Day One

DAY TWO PROGRAM

5 mins	Introduce the program for Day Two.	

Word Mime

Instructions for facilitator: Prepare a set of these cards by cutting out the words/phrases and sticking each one to a card.

Transparency

The Partnership Cycle

One Way Learning

Avoidance

Receptivity

Knowledge
Creation

Session 9

LEVERAGING LEARNING IN
/////////////////////////////// EXISTING PARTNERSHIPS

SESSION OVERVIEW
- Leveraging learning through transparency and receptivity
- Applying the ideas to the case study

KEY LEARNING POINTS
Not all partnerships include learning and knowledge sharing as an explicit purpose.

Even in partnerships that do have learning as an explicit goal, learning and knowledge sharing do not always occur effectively.

There is almost always the potential for strengthening learning in existing partnerships.

To leverage learning in a partnership, partners must maximize their transparency and receptivity.

Merely having the motive for shared learning is not enough. The partners must ensure the joint means and opportunity for shared learning.

RESOURCES
Marker pen and large PostIt notes for each small group

Flipchart stand and paper for each small group

PowerPoint

ADB – Northland Development Agency Partnership Case Study Handout

ADB-NDA Case Study Worksheet

SESSION OVERVIEW		
5 mins	Introduce session overview using PowerPoint Not all partnerships are intended to facilitate learning and knowledge-sharing as an explicit purpose. However, there is the potential for learning and knowledge-sharing in almost every partnership. Hence if learning is not explicitly encouraged, an important opportunity is wasted. A key challenge for those already working in a partnership is, therefore, to leverage the learning potential of the partnership. This session builds on the previous sessions and concludes by applying the ideas to the ADB-NDA Case Study.	PowerPoint
INCREASING TRANSPARENCY AND RECEPTIVITY		
5 mins	Use Factors That Affect Leveraging of Learning in Partnerships PowerPoint to introduce some factors. Explain to participants that it is important to jointly review the progress of every partnership. A joint review should be comprehensive and assess to what extent each partner organization is maximizing the potential to learn from their collaborative work. One way of doing this is to take an appreciative approach – identify examples of learning and knowledge-sharing, understand how they came about and what can be done to encourage further learning and knowledge sharing. As we have seen earlier, if each organization adopts a collaborative learning strategy this is more likely to lead to a balanced open approach to learning in the partnership. Collaborative learning requires transparency and receptivity by both partners.	Factors That Affect Leveraging of Learning in Partnerships PowerPoint
	Use Learning Strategies Adopted by a Single Organization PowerPoint to remind participants about transparency and receptivity. Explain the importance of maximizing both in order to adopt a collaborative learning strategy.	Learning Strategies Adopted by a Single Organization PowerPoint

10 mins	Divide participants into two groups – A and B. Each will work on their task at the same time	Marker pen and large PostIt notes for each group
	Ask group A to brainstorm a list of ways in which an organization could increase its transparency in the context of learning in a partnership. Ask a volunteer to write down the ideas using a marker pen on large PostIt notes and place them on a flipchart sheet.	Flipchart stand and paper for each group
	Ask group B to brainstorm a list of ways in which an organization could increase its receptivity in the context of learning in a partnership. Ask a volunteer to write down the ideas using a marker pen on large PostIt notes and place them on a flipchart sheet.	
10 mins	Use the Motive, Means and Opportunity PowerPoint to remind the participants what is meant by each term. Now ask both groups to allocate each of their ideas under one of the three headings.	Motive, Means and Opportunity PowerPoint
	Open a discussion during which you use the How to Strengthen Transparency and How to Strengthen Receptivity PowerPoints to add any ideas that have not already been mentioned.	How to Strengthen Transparency and How to Strengthen Receptivity PowerPoints Transparency and How to Strengthen Receptivity PowerPoints

APPLYING THESE IDEAS TO THE CASE STUDY		
20 mins	Ask participants to remain in their two groups (or if the groups are larger than around six in number divide each group into two). Ask the groups to discuss questions 4, 5 and 6 of the case study and note their answers on a flipchart.	ADB – 'Northland Development Agency' Partnership Case Study Handout
10 mins	Discuss the case study questions in turn, making reference to the ADB-NDA Case Study Notes. The worksheet may be handed out to the participants.	ADB-NDA Case Study Notes
CONCLUSION		
5 mins	Using PowerPoint present the key learning points from the session. Remind participants that they have been examining ways of leveraging learning in existing partnerships. They will now be going on to look at designing partnerships where learning is an explicit, or even the main, purpose.	PowerPoint

ADB-'Northland Development Agency'

/////////////////////////// PARTNERSHIP CASE STUDY

INTRODUCTION TO CASE STUDY

This case study is based on a real-life partnership between ADB and another institution (the name of the other institution and the dates have been changed to maintain anonymity). The case study uses the results of an independent review carried out to examine the partnership relationship between the two organizations. Although the review examined all aspects of the partnership, this case study focuses on the knowledge sharing and learning dimension, providing other information only for the purpose of context setting.

Section 1 of this case study introduces the two institutional partners: the Asian Development Bank and the Northland Development Agency (NDA) and the nature of their partnership. Section 2 summarizes the key findings of the independent review of the partnership, the ten recommendations made and the management response to those ten recommendations. In Section 3 you are invited to explain the underlying reasons for one of the key findings of the review, namely the limited success of the knowledge-sharing dimension of the partnership. You are also asked to respond to the recommendations made.

Text in italics is quoted directly from the report of the independent review (though dates have been changed to preserve anonymity).

1. BACKGROUND TO THE PARTNERSHIP

1.1 The Asian Development Bank (ADB)

ADB is a multilateral international development finance institution whose mission is to help its developing member countries reduce poverty and improve the quality of life of people in Asia. Headquartered in Manila and established in 1966, ADB is owned and financed by its 67 members, of which 48 are from the region and 19 are from other parts of the globe. Under ADB's Strategy 2020, a long-term strategic framework adopted in 2008, ADB follows three complementary strategic agendas: inclusive growth, environmentally sustainable growth and regional integration.

ADB provides various forms of assistance to governments and private enterprises based on the priorities of its developing member countries. ADB's primary instruments are policy dialogue, loans, grants, guarantees, equity investments, and technical assistance. In 2010, ADB's total assistance amounted to $17.51 billion. Loans worth $11.46 billion were approved for 118 projects. Grants of $981.7 million financed 40 grant projects. Five guarantees for $982.3 million and $243 million for eight equity investments were also approved. Technical assistance, which is used to prepare and implement projects and support advisory and regional activities, amounted to $175.5 million for 243 projects. In addition, $3.67 billion in direct value-added loan, grant, and technical assistance cofinancing for 156 projects was generated.

1.2 The Northland Development Agency (NDA)

Within the country of Northland's official development aid system, NDA is the primary organization for bilateral Northland untied aid. NDA has almost 1500 staff. Funding is provided on an untied basis in the form of grants, loans (soft to market-based terms), guarantees or equity participation.

In the late 1980s, Sub-Sahara Africa was NDA's main beneficiary, receiving 40% of its funding commitments. The Mediterranean Basin countries, including North Africa, received 25% of commitments and Asian countries received 25%. While NDA strategy in Asia initially focused on Millennium Development Goals (MDG)-related areas, such as rural development, human development and water resource management. NDA is now expanding to emerging countries in Asia with the aim of supporting "green and inclusive growth" and the protection of Global Public Goods. It should be noted that in 2009 about 70% of total commitments in Asia were still made through sovereign loans, with only 12% in the form of non-sovereign subsidized loans and the remainder being split between market-rate loans and grants, the latter showing a decreasing trend.

1.3 Timeline of Partnership

The partnership between ADB and NDA followed the timeline below:

1994	Collaborative activities between ADB and NDA begin.
2002	Memorandum of Understanding on Establishing Operational Arrangements signed between ADB and NDA
2005	Evaluation of the ADB-NDA Partnership
2005	First high level retreat for the ADB-NDA Partnership
2006	Second high level retreat for the ADB-NDA Partnership
2008	Third high level retreat for the ADB-NDA Partnership

2008	Terms of Reference prepared for the Strategic Review of the ADB-NDA Partnership
2008	Independent review of ADB-NDA Partnership
2009	Report of the Strategic Review of the ADB-NDA Partnership presented
2009	Fourth high level retreat of the ADB-NDA Partnership. Partnership Framework Agreement signed between ADB and NDA for the period 2010-2016
2010	ADB-NDA fifth high level retreat discusses the follow-up on the independent evaluation of the ADB-NDA partnership.

1.4 Partnership Memorandum of Understanding (MoU)
In 2002, the ADB and NDA signed a Memorandum of Understanding on Establishing Operational Arrangements. The document was very brief (two pages) and listed the areas for operational arrangements as follows:

"Each party will make every effort to strengthen between the institutions co-operation, in particular in matters relating to:
a) *Identification of projects that qualify for financing both by ADB and NDA*
b) *Joint appraisal and financing of projects recognized as feasible within the guidelines of both institutions.*
c) *Follow-up and review of jointly financed projects and sector interventions.*
d) *Exchange of visits between ADB and NDA to discuss matters of common interest*
e) *Regular exchange of information, documents, and publications being produced by the institutions (subject to their respective confidentiality procedures).*
f) *Training of public and private sector professional staff from relevant DMCs.*
g) *Exchange of professional staff between the institutions whenever appropriate."*

2. INDEPENDENT REVIEW OF THE ADB-NDA PARTNERSHIP
In 2008 an independent review of the NDA-ADB partnership was commissioned by NDA. The following excerpt from the terms of reference describes the objectives of the Review.

2.1 Review Terms of Reference - Objectives

Objective 1. *Take stock of the ADB-NDA partnership, by updating the evaluation carried out in 2005 by assessing the outcomes of their cooperation. The consultant will extend the study to the three following areas:*

- *Institutional cooperation (MoUs, retreats, high-level meetings, secondment, other joint activities). The consultant will assess how the institutional dialogue evolved during the recent period, which kind of institutional arrangements have been set up, how they worked and to what extent they impacted the operational activities;*
- *Co-financing activities (volume, sectors, countries and regions, project processing and monitoring performance, financial (lending and non-lending) products, aid management efficiency, results management). In addition to an overall ADB-AFD cofinancing portfolio performance, the consultant will conduct a detailed review on a sample of 6 co-financing arrangements representing around 20% of the portfolio of public sector projects: this review focused on the public sector projects will (i) compare ADB and AFD respective processing and implementation processes, (ii) assess the project management performance and results, (iii) sum up the lessons learned (strengths and weaknesses, pending issues, etc.) from these cofinancing arrangements;*
- ***Knowledge-based activities, including research and project evaluation. The consultant will inventory the joint activities in this area. Beyond this cooperation, the consultant will examine whether and how NDA and ADB use or take advantage of knowledge products coming from the partner institution.*** *[Emphasis added for this case study]*

Objective 2. *From the assessment above, analyse the ways to strengthen ADB-NDA partnership and address global issues (aid effectiveness, strategic priorities, areas of mutual interest, partnership monitoring process…).*

Objective 3. *Outline the cooperation challenges and prospects by:*

- *Summing up the strengths and the limitations of ADB-NDA partnership, as reflected by the partnership assessment, and recommending ways of improving the current cooperation;*
- *Identifying the global and strategic challenges that ADB and NDA should address by intensifying their partnership for their mutual interest, and outlining the opportunities in this respect.*
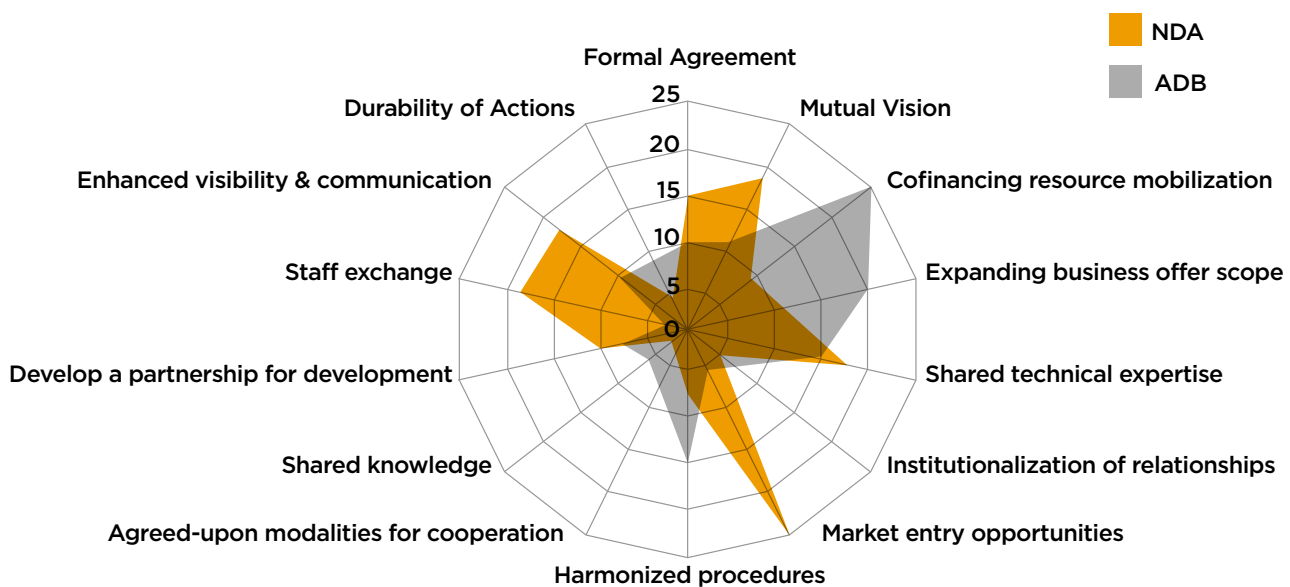
2.2 Main Findings of the 2008 Review

Overall, the review concluded, the partnership between ADB and NDA had been relatively successful in the area of co-financing projects but was in need of greater conceptual clarity as the partners were found to have different interpretations of the purposes of the partnership and, therefore, different degrees of commitment to the various elements of the partnership. The following findings – that relate specifically to knowledge sharing and knowledge management - were noted in the review report:

"There has been limited success in implementing some areas of the partnership, in particular in knowledge management, research and analytical work. However, we could not identify traces of joint systematic knowledge management actions taken. Apart from the Retreats and the evaluation work performed in 2005, NDA and ADB staff rarely identified and shared good practices or lessons learned; formally documented ideas, information or experiences that could be useful to others; or actively shared their knowledge, except on specific co-financed projects. We also noted that a more appropriate monitoring and accountability system was needed to ensure that the reporting of performance will be done on a regular basis. With regard to research, we noted that, apart from good intentions, the partners have implemented no particular actions."

The following diagram summarizes the assessment of the two organizations concerning 14 dimensions of the partnership. The orange scores are those of NDA, the transparent grey scores are those of ADB.

ADB|Learning in Partnerships

2.2.1 THE PARTNERS HAVE THE INTENTION TO SHARE KNOWLEDGE BASED MANAGEMENT ACTIONS, BUT THE AGENDA FOR THIS DOES NOT YET EXIST

We could not identify traces of joint systematic knowledge management actions in the NDA-ADB partnership. Apart from the Retreats and an evaluation work performed in 2005, NDA and ADB staff rarely identified and shared good practices or lessons learned. Nor did they formally document ideas, information or experience that could be useful to others or actively share their knowledge, except on specific co-financed projects. While there is some knowledge sharing between the two institutions, it is largely ad hoc in nature. We noted an absence of any knowledge management tool at the level of country operations.

An initiative that we found commendable at ADB is the "Knowledge Solutions" showcase: a paper-based series of short documents providing guidelines on a variety of topics in order to provide support to ADB staff and partners. This consists in sharing experiences, guidelines and lessons learned. In particular, we noted the publication entitled "Creating and Running Partnerships", which highlights key drivers of success and guidelines for managers.

2.2.2 JOINT RESEARCH PROJECTS OFFER THE POTENTIAL FOR ENHANCED COLLABORATION BUT OPPORTUNITIES HAVE NOT YET BEEN EXPLOITED

On the research side, we noted from the executive summaries of past Retreats that research has been considered important. Both NDA and ADB having strong departments in this area. For instance, at the Retreat of 2008, ADB and NDA agreed to initiate cooperation in knowledge management and research with the aim of developing joint activities, climate change being a theme of common interest. ADB research centered in the following departments and offices: 1) Economics and Research Department; 2) Regional and Sustainable Development Department; Office of Regional Economic Integration; and the ADB Institute in Tokyo. Research MoUs between ADB and other institutions have also been signed (Inter-American Development Bank [IADB], World Bank, Oganisation for Economic Co-operation and Development [OECD], International Monetary Fund [IMF], etc.). At NDA, the Research and Evaluation Department is composed of the following units: Economic and Social Research; Macroeconomic Analysis and Country Risk; Evaluation and Knowledge Capitalization; and Support to Knowledge Management.

For ADB, research is seen to be a public good, one that also has networking advantages. Therefore, it is most beneficial when acquired from the greatest number of sources and disseminated to the widest possible audience. Most of the research capabilities of ADB are located in-house. For instance, the Economics and Research Department has a fulltime staff of around 30 professionals, most at the Doctor of Philosophy (PhD) level, and around 30 support staff. But NDA also outsources research to specialized centers and universities. A meeting with the ADB Economics and Research Department revealed the following research priorities: inclusive growth; diagnosing critical constraints to growth; economics of climate change and low-carbon growth; commodities, energy and global economic monitoring; impact assessments; achieving more balanced growth; pursuing fiscal and debt sustainability; and poverty monitoring. Knowledge-based work within the partnership could be explored in these areas.... We recommend that NDA and ADB engage in more substantial knowledge and research activities in the future.

2.2.3 PAST EVALUATION ANALYSIS HAS NOT BEEN FULLY INTEGRATED INTO THE DECISION-MAKING PROCESS

Monitoring and evaluation (M&E) functions are essential elements of the financial management cycle of any partnership. In particular, the purpose of the evaluation is to provide the various stakeholders with an independent and accountable assessment of past and current cooperation with each partner. The evaluation is the necessary tool to monitor progress toward key goals and to better understand the constraints hampering progress and, if needed, to make specific recommendations for corrective measures to be implemented.

Due to limited management resources and budgets dedicated to M&E, the evaluation function has evolved somewhat erratically within the NDA-ADB partnership. We found traces of only one evaluation, commissioned by NDA in 2006, and covering the period 1996-2005. Not surprisingly, the linkages between findings and recommendations from the 2005 evaluation have not been systematically visible in practice during the last few years. Although a few recommendations proposed in 2005 have received attention (i.e. high-level meetings and retreats), the majority of these have not been implemented (information-sharing at both HQ and country levels, joint planning documents, knowledge management, joint evaluations).

As a result, the partnership has not been able to capitalize on M&E findings and analyses. When asked about M&E, many interviewees pointed to the scarce resources dedicated to this field, the non-availability of trained personnel that could inform the M&E process and the limited number of co-financing arrangements carried out in previous years. The data-gathering and analysis activities regarding delivery and cost-effectiveness of M&E for the partnership was thus considered by many to be too costly and not necessary as a regular activity.

Now that the partnership is attaining a critical mass, with an expansion being considered, we recommend establishing an evaluation system to ensure the effective functioning of M&E. Before doing so, it is important for the partners to identify the objectives of introducing such a system. The evaluation departments of both NDA and ADB have the resources and the expertise to develop and render operational an effective M&E system.

2.2.4 AHEAD OF THE CURVE: BUILDING SCENARIO-PLANNING CAPACITY TO CREATE A DIALOGUE BETWEEN RISKS AND OPPORTUNITIES IN SPECIFIC AREAS

During interviews at NDA and ADB, a clear need was expressed to reinforce the strategic planning and analysis function, particularly in the fields of energy and environment. In these fields, which will face many challenges in coming years, forward thinking is necessary.

To accomplish this, scenario planning should be prioritized to consider a wide range of possibilities, trends and uncertainties (i.e. in climate change, migration, renewable energy). This would partially compensate for the usual errors in decision-making – overconfidence about the medium-term future and tunnel vision. In specific areas, the partnership should utilize scenario planning to simplify the avalanche of data and focus on a limited number of alternative activities. This would also allow the partners to think systematically about complexity, uncertainty and interdependence in turbulent times. One senior staff member asserted that "achieving believability and action in climate change requires a depth of insight and understanding that is rare today within the organization. It is important for all of us to develop an internally consistent view of what the future might turn out to be in Asia on climate change – not a forecast, but possible future outcomes."

In conclusion, we recommend that the partners develop a common approach to specific game-changing events in Asia that could occur over the medium and long term. When upheavals occur, the rules of the game that were previously in place may no longer apply. This is why there is a need to anticipate major shifts. In practical terms, the partners could decide to embark on a joint scenario-planning exercise, for example in the area of climate change, energy or urban development. Taking such a long view will constitute a more proactive and anticipatory approach to address deep-seated problems, to anticipate challenges and opportunities at the level of the partnership and to consider the long-term effects and potential unintended consequences of actions that might well occur in the near, medium and longer terms.

2.3 Main Recommendations of the Review

The following recommendations were made in the Review by the independent evaluation team. Recommendation 6 focuses on knowledge management (and, hence, is included in full). Summaries of the other recommendations are included to provide an overview of the evaluators' overall assessment of the partnership.

2.3.1 RECOMMENDATION 1: RE-DEFINING THE MISSION AND SCOPE OF THE PARTNERSHIP

Before embarking upon major new areas of collaboration, NDA and ADB should undertake an internal consultation to seek agreement on a strategic vision for the future that would position the partnership at the centre of specific priorities, and which would provide credible information on the basis of upstream analytical approaches.

2.3.2 RECOMMENDATION 2: STREAMLINING THE BUSINESS PORTFOLIOS IN A MEDIUM-TERM STRATEGY

We recommend that the partners streamline their cofinancing strategy over the medium term to avoid having a spread of projects across too many sectors and sub-sectors.

2.3.3 RECOMMENDATION 3: MAPPING POTENTIAL PROJECTS IN SELECTED AREAS OVER THE NEXT THREE YEARS

We recommend developing a comprehensive mapping of potential areas of joint intervention according to a taxonomy to be agreed on but oriented towards the practical identification of projects that could be undertaken over the next three years.

2.3.4 RECOMMENDATION 4: ENSURING APPLICATION OF PROCESSES TO BETTER ALIGN PROCEDURES AT ALL LEVELS OF THE PARTNERSHIP

We recommend that the partners begin considering how to better align procedures and develop awareness of new ADB processes and instruments in order to seek synergies and more efficient implementation.

2.3.5 RECOMMENDATION 5: STRENGTHENING ACCOUNTABILITY AND MONITORING OF CO-FINANCING AND OTHER JOINT ACTIONS

It is important to have a systematic tool for reporting on cofinancing arrangements as well as any other joint initiatives. Co-financing strategies should be evidence-based, results oriented, cost-effective and built on transparent relationships between providers of assistance and beneficiary countries. To achieve this outcome, an MIS tool is required.

2.3.6 RECOMMENDATION 6: CREATING A CONCRETE KNOWLEDGE MANAGEMENT AGENDA, INCLUDING STRATEGIC SCENARIO PLANNING, EVALUATION AND SPECIFIC RESEARCH

"We could not identify joint systematic knowledge management and research actions within the NDA-ABD partnership. Apart from the Retreats and evaluation work performed in 2005, NDA and ADB staff rarely identified and shared good practices or lessons learned. It is important to expand areas of collaboration beyond co-financing (which has been the major tool to implement joint activities) and to put in place knowledge-management and to research joint initiatives that will add value to the partnership.

"With respect to the preceding paragraph, we recommend addressing the issue of knowledge management, research and evaluation in a more systematic manner with the objective to identify a very limited number of joint projects that would allow a sustainable partnership to be developed in these areas. It is important to promote joint research (operational, thematic or sectoral) and the development of knowledge products. During our interviews, a few topics were mentioned by both NDA and ADB staff: climate adaptation and resilience (with little research expertise at NDA presently); migration; growth strategies; clean energy; and impact evaluation.

"Evaluation should become a regular feature of the partnership to collect performance information to highlight lessons learned and best practices in selected areas. It can also be used as critical evidence to develop program areas of mutual interest. We also recommend performing a joint evaluation of selected co-financed projects. Evaluation offices of both NDA and ADB could conduct these evaluations. For the future evaluation of the partnership, we also recommend a fully shared exercise, from the drafting of the terms of reference to the financing of the evaluation itself.

"Finally, we recommend developing a scenario-planning agenda with the objective of developing a limited set of structured scenarios on specific topics (climate change, energy, urban development). In doing so, the partners could acquire common knowledge in the selected areas, highlight driving forces behind the issues under study, develop systemic analysis of critical variables at play and draw on specific NDA and ADB expertise to compile a unique set of data and analysis to reflect on the way forward for the partnership in Asia."

2.3.7 RECOMMENDATION 7: INCREASING THE OVERALL VISIBILITY OF THE PARTNERSHIP

We recommend developing a more systematic communication campaign at both HQs and on the ground to increase the visibility of the partnership.

2.3.8 RECOMMENDATION 8: RE-INVENTING THE RETREAT CONCEPT

We recommend reconsidering the Retreat concept and to make it oriented In sum, we recommend using the Retreat to address concerns related to the performance of the partnership.

2.3.9 RECOMMENDATION 9: OPTIMIZING THE STAFF EXCHANGES BETWEEN THE TWO ORGANIZATIONS

We recommend the following: 1) consider re-allocating the NDA secondee to a new sector within NDA, perhaps non sovereign operations or the environment. In doing so, NDA would seek to bring strong sectoral expertise to the ADB in order to develop a specific business line of co-financed projects; 2) a staff exchange from ADB to NDA has to be secured to ensure good coordination between the organizations.

2.3.10 RECOMMENDATION 10: RE-INSTITUTIONALIZING THE PARTNERSHIP TO ENSURE LONG-TERM DURABILITY

The renewal of the MoU for the period 2009-2014 represents a major milestone. Both organizations feel the need to deepen the partnership. In particular, the new Partnership Framework Agreement represents an opportunity to explore new areas of convergence, notably private sector and non-sovereign financing; to expand beyond the 'traditional' geographical areas of collaboration; to expand areas of collaboration beyond co-financing (which has been the major tool to implement joint activities).

To re-emphasize, we recommend that both NDA and ADB agree upon the modalities for better cooperation.

2.4 Management Response to Independent Review

During their fourth high level retreat, the two institutions discussed the findings and recommendations of the independent Review. Recommendations 1, 5, 6, 7, 8, 9, and 10 were accepted fully. Recommendations 2, 3, and 4 were accepted though in some cases the issues raised had already been addressed.

3. CASE STUDY QUESTIONS

1. Conduct your own assessment of the partnership using the following table based on the Qualities Checklist for Effective Learning in Partnerships and score each of the factors out of 5 (where 5 is fully met and 0 is not met).

Qualities	Score	Notes
1. The partnership has a solid base of joint commitment and understanding		
2. Each partner has clearly identified its intended benefits from the partnership		
3. There is trust between the partners.		
4. Each partner values the other partner's knowledge		
5. Knowledge sharing and mutual learning is an explicit goal of the partnership (i.e. there is a shared learning agenda).		

Qualities	Score	Notes
6. There is a clear and appropriately detailed plan for achieving the goals of the partnership.		
7. Sufficient and appropriate resources are committed from the partners for achieving the goals of the partnerships.		
8. The partnership has an appropriate level of formality.		
9. The partnership has good leadership.		
10. There is alignment between the organizational cultures of the partners.		
11. The partnership has clear and effective lines of accountability.		
12. Both partners have an in-depth understanding of models and tools for learning and knowledge sharing.		
13. Accurate and appropriate indicators are used to evaluate and improve the success and progress of the partnership.		
14. Partners regularly communicate in a productive and mutually supportive way.		
15. Tools and mechanisms are being used in practice to surface, share, and generate new knowledge (e.g. joint After Action Reviews, meetings, workshops, seminars, retreats, etc.)		
16. Learning and knowledge sharing are integrated in the partnership management cycle.		

2. What Learning Strategy do you think each organization was using? What reasons can you suggest for each organization's choice of strategy?

3. Plot the relationship between the two organizations using the *Outcomes of Interorganizational Learning – Pay-Off Matrix.* What learning outcome is predicted from this relationship? How closely does the actual outcome compare with the predicted outcome of this combination?

In the light of your growing understanding of good learning and knowledge sharing practices in partnerships:

4. What could each organization do to increase its transparency and receptivity?

5. What practical action could be taken by the organizations to respond to the recommendations in section 2.3.6 above? Specifically, what could be done to (a) strengthen formal and informal knowledge connections between the two institutions?; and (b) encourage a learning-focused approach to evaluation between the two institutions?

6. A new Partnership Framework Agreement is about to be prepared. Identify three key issues to agree in the Agreement to strengthen knowledge sharing and learning between ADB and NDA in the future?

ADB-NDA Case Study
// NOTES

These notes should be given to participants only after the second session in which the case study is discussed.

QUESTION 1

Conduct your own assessment of the partnership using the Qualities Checklist for Effective Learning in Partnerships and score each of the factors out of 5 (where 5 is fully met and 0 is not met).

Qualities	Score	Notes
1. The partnership has a solid base of joint commitment and understanding	2	The original MoU was very brief and subsequent joint working focused mainly on co-financing.
2. Each partner has clearly identified its intended benefits from the partnership	2	The original MoU was vague and there is little evidence that the partners looked further than co-financing. If they had other benefits in mind, they were not clearly articulated.
3. There is trust between the partners.	3	There is enough trust to make a joint review possible but not high levels.
4. Each partner values the other partner's knowledge	2	There is little evidence that this is the case. NDA seems to value ADB's knowledge more than ADB values NDA's.
5. Knowledge sharing and mutual learning is an explicit goal of the partnership (i.e. there is a shared learning agenda).	2	In the original MoU this was mentioned but in terms of means (exchange visits, exchange of information, and training) and not intended outcomes. There is no shared learning agenda.
6. There is a clear and appropriately detailed plan for achieving the goals of the partnership.	3	De facto in terms of co-financing projects but absent in terms of other objectives.

Qualities	Score	Notes
7. Sufficient and appropriate resources are committed from the partners for achieving the goals of the partnerships.	3	For co-financing of projects, yes. For other objectives, no.
8. The partnership has an appropriate level of formality.	3	A more detailed MoU would have provided greater clarity.
9. The partnership has good leadership.	2	It is not clear who actively manages the partnership in each organization.
10. There is alignment between the organizational cultures of the partners.	2	There is little evidence of this. NDA seems more adaptable and less formal than ADB.
11. The partnership has clear and effective lines of accountability.	2	There is little evidence of this.
12. Both partners have an in-depth understanding of models and tools for learning and knowledge sharing.	3	This is true of ADB through its Knowledge Management Center (though apparently not of those involved in the partnership work itself). Insufficient evidence to say whether NDA has this understanding.
13. Accurate and appropriate indicators are used to evaluate and improve the success and progress of the partnership.	2	Apart from the review, there had apparently been little or no monitoring and evaluation of the partnership.
14. Partners regularly communicate in a productive and mutually supportive way.	2	Very little evidence of this apart from retreats that have been formal rather than supportive.
15. Tools and mechanisms are being used in practice to surface, share, and generate new knowledge (e.g. joint After Action Reviews, meetings, workshops, seminars, retreats, etc.)	1	Almost no evidence of this. The review itself is exceptional in taking an in-depth look at the partnership.
16. Learning and knowledge sharing are integrated in the partnership management cycle.	1	Almost no evidence of this.

QUESTION 2
What Learning Strategy do you think each organization was using? What reasons can you suggest for each organization's choice of strategy?

In the case of ADB, the strategy appears to be one of Avoidance (low receptivity and low transparency). In the case of NDA, the strategy is low/medium receptivity and low/medium transparency, hence Avoidance or Compromise.

It is unlikely that the organizations made a conscious choice of their learning strategies. The reasons for the 'de facto' choices may be that the focus of the partnership in the early stages was mainly on co-financing so mutual learning was overlooked (particularly by ADB) and then became 'undiscussable' and hence something to be avoided. The original agreement was vague in every respect and although it mentioned exchange visits and sharing information this was never made specific enough to become an objective that could be monitored. It may also be that because little was done to develop trust, each organization was unsure about how transparent it could reasonably be and whether learning based on mistakes would be dealt with confidentially.

QUESTION 3
Plot the relationship between the two organizations using the Outcomes of Interorganizational Learning – Pay-Off Matrix. How does the actual outcome compare with the predicted outcome of this relationship?

This is not a fruitful combination for knowledge sharing and mutual learning because no meaningful learning can be expected as an outcome. This is consistent with the findings of the partnership review.

QUESTION 4
What could each organization do to increase its transparency and receptivity?

To increase transparency:

- Identify areas of tacit knowledge that the partner may be interested in (what our organization is good at but may take for granted).
- Establish a wide range connections at different levels for sharing knowledge.
- Share documentation.
- Invite partner staff to visit.
- Invite partners to joint knowledge marketplaces.

To increase receptivity:

• Identify questions (a learning agenda) with which our organization would value assistance and share these with partner.
• Understand and value the partner's areas of expertise
• Change mindset!
• Visit partner organization.

QUESTION 5

What practical action could be taken by the institutions to respond to the recommendations in section 2.3.6 above? Specifically, what could be done to (a) strengthen formal and informal knowledge connections between the two institutions?; and (b) encourage a learning-focused approach to evaluation between the two institutions?

(a) strengthen formal and informal knowledge connections between the two institutions?

• Create joint teams to address questions of interest to both partners
• Hold regular After Action Reviews involving relevant staff from both organizations
• Set up online communities open to staff of both organizations
• Agree a range of knowledge products and produce these jointly
• Create staff profile pages shared between both organizations
• Learn about the partner's culture and customs.
• Hold regular meetings, seminars, and workshops.
• Provide the staff of each organization with ADB's Knowledge Solutions and ask them to identify and introduce those that would be most useful.

(b) encourage a learning-focused approach to evaluation between the two institutions?

• Use Critical Incident Technique to create a culture of joint reflection
• Jointly identify questions for evaluation ToR.
• Use (or develop) the partnership 'spider diagram' from the Review to assess the evolution of the partnership over time.
• Require joint management responses to evaluations.
• Hold workshops to discuss evaluation findings.

QUESTION 6

A new Partnership Framework Agreement is about to be prepared. What could be included in the Agreement to strengthen knowledge sharing and learning between ADB and NDA in the future?

In addition to the points raised in the answers to questions 3 and 4,
- Clear purpose or goal (including a learning agenda).
- Roles and responsibilities of each partner (particularly partnership coordinators and organization leaders).
- Principles on which the partnership is based.
- An assessment of each partner's relevant knowledge and expertise.
- Clarity about partnership level, legal basis and joint activities.
- Clarity about processes for collaboration.
- Clarity about processes for knowledge generation and exchange.
- Mechanisms for dispute resolution.
- Clarity about monitoring and evaluation systems and procedures.

Session 10

KNOWLEDGE PARTNERSHIPS ////////////////////////////

SESSION OVERVIEW
- What are knowledge partnerships?
- Benefits from knowledge partnerships
- Functions of knowledge partnerships
- Common forms of knowledge partnerships
- Why knowledge partnerships are important to ADB?
- ADB's Guidelines for Knowledge Partnerships
- Using the OECD DAC criteria as building blocks for knowledge partnerships

KEY LEARNING POINTS
Knowledge partnerships are partnership relationships in which learning and knowledge sharing is an explicit and primary purpose.

There are six main functions of knowledge partnerships: filtering, amplifying, investing & providing, convening, community-building, and learning & facilitating.

Knowledge partnerships can take one of six main forms, each of which has typical characteristics.

Knowledge partnerships are a key element of ADB's Strategy 2020.

ADB has developed Guidelines for Knowledge Partnerships.

The Guidelines use the OECD DAC Criteria as a framework for designing and evaluating knowledge partnerships.

RESOURCES
PowerPoint

Flipchart and marker pens

Guidelines for Knowledge Partnerships
(Available: www.adb.org/documents/guidelines/knowledge-partnerships/guidelines-knowledge-partnerships.pdf

SESSION OVERVIEW		
5 mins	Introduce session overview using PowerPoint Deal with any points of clarification.	PowerPoint
WHAT ARE KNOWLEDGE PARTNERSHIPS?		
10 mins	Use What Are Knowledge Partnerships? PowerPoint to explain what ADB views as the distinctive characteristics of Knowledge Partnerships. Emphasize the important characteristic of Knowledge Partnerships – they are formed explicitly to share and create new knowledge.	What Are Knowledge Partnerships? PowerPoint
BENEFITS FROM KNOWLEDGE PARTNERSHIPS		
10 mins	Use Benefits from Knowledge Partnerships PowerPoint to introduce the potential benefits of knowledge partnerships. Ask participants which of the benefits they have noticed in their own experience of partnerships.	Benefits from Knowledge Partnerships PowerPoint
FUNCTIONS OF KNOWLEDGE PARTNERSHIPS		
10 mins	Use Functions of Knowledge Partnerships PowerPoint to introduce the six main functions. Ask participants about their experience of these functions in the partnerships they have been part of.	Functions of Knowledge Partnerships PowerPoint
COMMON FORMS OF KNOWLEDGE PARTNERSHIP		
	Use the three Common Forms of Knowledge Partnerships PowerPoints to show that Knowledge Partnerships can have varying degrees of formality and each of the five partnership forms has different attributes, benefits and limits/challenges associated with them. Ask participants what form of partnership they think was represented by the case study (Inter-Organizational Partnership). Ask participants to share their experience of different forms of partnership.	Common Forms of Knowledge Partnerships PowerPoints

WHY KNOWLEDGE PARTNERSHIPS ARE IMPORTANT TO ADB		
10 mins	Use the Enhancing Knowledge Management Under Strategy 2020: Plan of Action (2009-2011) PowerPoint and the Preface (p. vii paragraphs 1 and 2) from ADB's Guidelines for Knowledge Partnerships to explain the strategic importance of knowledge partnerships to ADB.	Enhancing Knowledge Management Under Strategy 2020: Plan of Action (2009-2011) PowerPoint Guidelines for Knowledge Partnerships
ADB'S GUIDELINES FOR KNOWLEDGE PARTNERSHIPS		
10 mins	Use What Are Knowledge Partnerships? PowerPoint to explain what ADB views as the distinctive characteristics of Knowledge Partnerships. Emphasize the important characteristic of Knowledge Partnerships – they are formed explicitly to share and create new knowledge.	ADB's Guidelines for Knowledge Partnerships PowerPoint Copy of Guidelines for Knowledge Partnerships
	Use ADB's Types of Knowledge PowerPoint and refer to p4-5 of the Guidelines for Knowledge Partnerships to summarize ADB's four main types of value-generating knowledge.	ADB's Types of Knowledge PowerPoint Guidelines for Knowledge Partnerships
	Use How ADB Benefits from Knowledge Partnerships PowerPoint and refer to p9 of the Guidelines for Knowledge Partnerships to introduce the key benefits for ADB of linking to locally held knowledge.	How ADB Benefits from Knowledge Partnerships PowerPoint Guidelines for Knowledge Partnerships

	Use Planning and Evaluating Knowledge Partnerships Using the OECD DAC Criteria PowerPoint and OECD DAC Criteria PowerPoint to explain that the Guidelines for Knowledge Partnerships makes innovative use of these to guide the design and evaluation of knowledge partnerships. How the criteria are used for monitoring and evaluation will be explained in Session 12.	Planning and Evaluating Knowledge Partnerships Using the OECD DAC Criteria PowerPoint and OECD DAC Criteria PowerPoint
CONCLUSION		
5 mins	Using PowerPoint present the key learning points from the session.	PowerPoint

Session 11
DESIGNING AND MANAGING
KNOWLEDGE PARTNERSHIPS //////////////////////////

SESSION OVERVIEW
- Principles for designing knowledge partnerships
- Success factors for knowledge partnerships

KEY LEARNING POINTS
Knowledge partnerships are more likely to be effective if they are based on a carefully negotiated agreement.

The principles of effective knowledge partnerships are the same as the principles for all effective partnerships.

Successful learning in knowledge partnerships depends on careful management of the collaborative working relationships not just the formal business arrangements.

RESOURCES
PowerPoint

Learning in Strategic Alliances Animation

Designing Knowledge Partnerships Worksheet

ADB (2009) Learning in Strategic Alliances. Manila. Available: http://www.adb.org/documents/information/knowledge-solutions/learning-in-strategic-alliances.pdf

Guidelines for Knowledge Partnerships (Available: www.adb.org/documents/guidelines/knowledge-partnerships/guidelines-knowledge-partnerships.pdf

SESSION OVERVIEW		
2 mins	Introduce session overview using PowerPoint Deal with any points of clarification.	PowerPoint
GROUND RULES FOR SETTING UP KNOWLEDGE PARTNERSHIPS		
5 mins	Use Ground Rules for Setting Up Knowledge Partnerships PowerPoint to explain the basic principles underlying the design of knowledge partnerships.	Ground Rules for Setting Up Knowledge Partnerships PowerPoint
DESIGNING LEARNING INTO PARTNERSHIPS		
5 mins	Use the Designing Learning into Partnerships PowerPoint and page 6 of Learning in Strategic Alliances Knowledge Solution Handout p6 to introduce six key activities that are necessary when designing learning into partnerships and the questions that can be used to focus management thought and action.	Designing Learning into Partnerships PowerPoint Learning in Strategic Alliances Knowledge Solution Handout
MANAGING COLLABORATIVE LEARNING IN PARTNERSHIPS		
5 mins	Use Managing Collaborative Learning in Partnerships PowerPoint and Guidelines for Knowledge Partnerships p32-33 to introduce the need to manage collaboration, knowledge processes and external communications.	Managing Collaborative Learning in Partnerships PowerPoint Guidelines for Knowledge Partnerships
SUCCESS FACTORS FOR KNOWLEDGE PARTNERSHIPS		
15 mins	Use the Success Factors for Knowledge Partnerships series of PowerPoints to introduce and emphasize the importance of Informal Leadership, Alignment and Identity, Technical Expertise and Resources, Coordination, Communication Systems, and Adaptive Capacity.	Success Factors for Knowledge Partnerships series of PowerPoints

DESIGNING KNOWLEDGE PARTNERSHIPS		
30 mins	Form small groups of 4-5 participants. Distribute Designing Knowledge Partnerships Worksheet. Show the Learning in Strategic Alliances Animation Ask the small groups to work together on the questions in the worksheet. Groups should write their answers on a flipchart using marker pens.	Designing Knowledge Partnerships Worksheet Learning in Strategic Alliances Animation Flipchart paper and marker pens for each small group
20 mins	Open a discussion on the answers to each of the questions in turn. Ask a different small group to lead the discussion of each question.	
CONCLUSION		
3 mins	Use the Designing and Facilitating Knowledge Partnerships - Key Learning Points PowerPoint present the key learning points from the session.	Designing and Facilitating Knowledge Partnerships - Key Learning Points PowerPoint

Designing Knowledge Partnerships
/// WORKSHEET

> **Please view the animation Learning in Strategic Alliances and then answer the following questions:**

1. Chanthu pointed out that a partnership agreement would need to be drawn up. What could be included in the Agreement to increase the likelihood of mutual learning and knowledge sharing between the partners?
2. To enhance learning effectiveness in strategic alliances, it was suggested that partners must:
   A. Assess and value the knowledge each party contributes.
   B. Agree how the parties will access each other's knowledge and expertise.
   C. Evaluate the more difficult to identify tacit knowledge and work out ways to make this more visible and transferrable.
   D. Establish a diverse range of knowledge connections between the partners, for example field visits, joint workshops, and sharing documentation.

   Suggest at least two benefits of each of the four strategies and comment on how they could be done in practice.

Learning in Strategic Alliances.

Scene 1:
VOICE OVER: Global Knowledge Solutions partner with different stakeholders to promote knowledge management and learning.

VOICE OVER: In Cambodia, Global Knowledge Solutions is forming a strategic alliance with national NGOs to promote knowledge management and learning as part of a sustainable livelihoods program.

VOICE OVER: A strategic alliance is a voluntary arrangement between two or more parties to pool resources to achieve a common goal whilst retaining their independence.

VOICE OVER: Chanthu is the Project Officer of the Global Knowledge Solutions sustainable livelihoods program in Cambodia. He informs Olive, the Chief Learning Officer, of his plans to develop a strategic alliance with NGOs.

Scene 2:

OLIVE: So how will you go about forming the strategic alliance, Chanthu? I know it will be difficult since there are many NGOs working to promote sustainable livelihoods in Cambodia. How will you choose the most suitable NGOs?

CHANTHU: The process will require a lot of time and effort from us and our potential allies. We already have good working relationships with very innovative NGOs active in sustainable livelihoods. We plan to start by discussing our vision with each NGO and get a deeper understanding of their vision, mission, and strategy. We will have to assess their interest in working closely, not only with us but with one another. Although all the parties involved retain their autonomy, we will all be interdependent as far as achieving the goal of the alliance is concerned.

OLIVE: I can see that this could be sensitive. Each party will have different things to offer and it will be important for all to acknowledge the value of everyone's contribution to the alliance, irrespective of the size of their organization.

CHANTHU: That's true! For example, some of the NGOs are quite small but have very creative ways of working in communities. Their knowledge could play a crucial part in the success of the alliance. Of course, we need to be confident that each party will be capable of actively participating over the long term.

OLIVE: Recent research that I have read suggests that it is more important for strategic alliances to agree on collaborative working relationships than on formal business arrangements, Of course, it will be necessary to devise a clear agreement about collaborative working practices with the partners so that everyone is clear about their roles and responsibilities.

CHANTHU: I'm already thinking about an agreement. It should include systems to monitor progress and evaluate working relationships as well as the joint performance. We will also need some sort of governance structure to administer the alliance. What do you think, Olive?

OLIVE: I agree with you on that one, Chanthu. But, you will also need to secure leadership commitment from the NGOs. Their leaders are the key to managing the alliance and keeping it alive.

CHANTHU: You're absolutely correct Olive. Although strategic alliances promise win-win situations for all parties, we need to acknowledge that there may be problems that could jeopardize the agreement. We will all have to work hard to prevent these problems from happening, and manage them if they do.

OLIVE: It sounds like you have got all the bases covered, Chanthu! Good-luck and let me know how I can help you in any way.

CHANTHU: Thanks Olive! I need all the luck I can get!

Scene 3:
VOICE OVER: A crucially important rationale for forming strategic alliances is the intent to learn. Strategic alliances open up opportunities for partners to gain knowledge and leverage strengths.

VOICE OVER: Strategic alliances, however, evolve as partners learn. Goals, competencies, and opportunities for learning change as strategic alliances undergo the phases of awareness and partner selection, exploration, expansion, and commitment to relationship.

VOICE OVER: Essential for each phase are the systems, mechanisms, processes, and behaviors that enable learning and translate that learning into action for the mutual benefit of the partners.

VOICE OVER: To enhance learning effectiveness in strategic alliances, partners must:
- Assess and value the knowledge each party contributes.
- Agree how the parties will access each other's knowledge and expertise.
- Evaluate the more difficult to identify tacit knowledge and work out ways of make this more visible and transferrable.
- Establish a diverse range of knowledge connections between the alliance partners, for example field visits, joint workshops, and sharing documentation.
- Build on existing knowledge to facilitate learning.
- Ensure that partner and alliance managerial cultures are aligned so that learning might be integrated into the mainstream work of each party to the alliance.

VOICE OVER: Strategic alliances bring organizations together and promise opportunities for collaboration, learning, and innovation. However, success requires management of the alliance process, not just management through formal agreement. More importantly, by paying close attention to mutual learning, all parties can maximize the benefits they gain from their involvement in strategic alliances.

The End

Session 12

MONITORING AND EVALUATING LEARNING IN PARTNERSHIPS

SESSION OVERVIEW
- Definitions of monitoring and evaluation.
- Using the OECD DAC Criteria as a framework for monitoring and evaluating learning in partnerships.
- Learning in partnerships – five areas that must be monitored.

KEY LEARNING POINTS
The OECD DAC Criteria provide a very useful framework for evaluating learning in partnerships.

In every partnership we should aim to monitor and evaluate the achievement of partnership aims AND the partnership arrangements.

A systematic approach to monitoring using well-documented monitoring data makes evaluation easier.

RESOURCES
PowerPoint

Flipchart paper and pens for each small group

Guidelines for Knowledge Partnerships (Available: www.adb.org/documents/guidelines/knowledge-partnerships/guidelines-knowledge-partnerships.pdf

SESSION OVERVIEW		
2 mins	Introduce session overview using PowerPoint

Deal with any points of clarification. | PowerPoint |
| **DEFINITIONS OF MONITORING AND EVALUATION** | | |
| **3 mins** | Use Definitions of Monitoring and Evaluation PowerPoint to remind participants of the differences between monitoring and evaluation.

Ask for comments and questions and respond to these. | Definitions of Monitoring and Evaluation PowerPoint |

EVALUATING LEARNING IN PARTNERSHIPS

5 mins	Use Evaluating Learning in Partnerships and the OECD DAC Evaluation Criteria PowerPoints to remind participants of the five OECD DAC criteria for evaluation: relevance, efficiency, effectiveness, sustainability, and impact.	Evaluating Learning in Partnerships
	Explain that these criteria provide a valuable framework for monitoring and evaluating learning in partnerships and that we will examine each in turn.	OECD DAC Evaluation Criteria PowerPoints

MONITORING AND EVALUATING LEARNING IN PARTNERSHIPS

5 mins	Use the Monitoring and Evaluating Learning in Partnerships: Relevance PowerPoint and Guidelines for Knowledge Partnership p 22 to explain the meaning of relevance in the context of a partnership. Introduce the bullet points in white (on left) as the desirable features concerning relevance that we would expect to see in a partnership. Introduce the bullet points in yellow (on right) as key questions concerning relevance that an evaluation should address.	Monitoring and Evaluating Learning in Partnerships: Relevance PowerPoint Guidelines for Knowledge Partnership
5 mins	Use the Monitoring and Evaluating Learning in Partnerships: Efficiency PowerPoint and Guidelines for Knowledge Partnership p 23 to explain the meaning of efficiency in the context of a partnership. Introduce the bullet points in white (on left) as the desirable features concerning efficiency that we would expect to see in a partnership. Introduce the bullet points in yellow (on right) as key questions concerning efficiency that an evaluation should address.	Monitoring and Evaluating Learning in Partnerships: Efficiency PowerPoint Guidelines for Knowledge Partnership

5 mins	Use the Monitoring and Evaluating Learning in Partnerships: Effectiveness PowerPoint and Guidelines for Knowledge Partnership p 22 to explain the meaning of efficiency in the context of a partnership. Introduce the bullet points in white (on left) as the desirable features concerning effectiveness that we would expect to see in a partnership. Introduce the bullet points in yellow (on right) as key questions concerning effectiveness that an evaluation should address.	Monitoring and Evaluating Learning in Partnerships: Effectiveness PowerPoint Guidelines for Knowledge Partnership
5 mins	Use the Monitoring and Evaluating Learning in Partnerships: Sustainability PowerPoint and Guidelines for Knowledge Partnership p 24 to explain the meaning of sustainability in the context of a partnership. Introduce the bullet points in white (on left) as the desirable features concerning sustainability that we would expect to see in a partnership. Introduce the bullet points in yellow (on right) as key questions concerning sustainability that an evaluation should address.	Monitoring and Evaluating Learning in Partnerships: Sustainability PowerPoint Guidelines for Knowledge Partnership
5 mins	Use the Monitoring and Evaluating Learning in Partnerships: Impact PowerPoint and Guidelines for Knowledge Partnership p 24 to explain the meaning of impact in the context of a partnership. Introduce the bullet points in white (on left) as the desirable features concerning impact that we would expect to see in a partnership. Introduce the bullet points in yellow (on right) as key questions concerning impact that an evaluation should address.	Monitoring and Evaluating Learning in Partnerships: Impact PowerPoint Guidelines for Knowledge Partnership

BASIC DATA REQUIRED TO MONITOR LEARNING IN PARTNERSHIPS		
2 mins	Use Basic Data Required to Monitor Learning in Partnerships PowerPoint to introduce five categories of data needed to monitor learning in partnerships.	Basic Data Required to Monitor Learning in Partnerships PowerPoint
10 mins	Divide participants into five groups. Allocate one category heading to each group and ask them to note down on a flipchart how they would gather the necessary data as part of the regular monitoring of progress of the partnership.	Flipchart and marker pens
10 mins	Ask each group to present their findings. Open a discussion and ask for any other suggestions. Emphasize the importance of taking a systematic approach to monitoring because well-documented monitoring data will make evaluation easier.	
CONCLUSION		
3 mins	Use Monitoring and Evaluating Learning in Partnerships - Key Learning Points PowerPoint to present the key learning points from the session.	Monitoring and Evaluating Learning in Partnerships - Key Learning Points PowerPoint

Session 13

COURSE SUMMARY AND
PERSONAL ACTION PLANNING

SESSION OVERVIEW
- Summary of course
- Participants complete a Self Reflection and Action Planning worksheet
- Participants complete a Personal Message worksheet

RESOURCES
Creating and Running Partnerships Animation

Personal Action Plan worksheet

Personal Message Worksheet

COURSE SUMMARY		
10 mins	Show the Creating and Running Partnerships Animation to summarize some of the main messages of the course.	Creating and Running Partnerships Animation
PERSONAL ACTION PLANNING		
15 mins	Ask participants to complete a Personal Action Plan worksheet. Participants keep this as a reminder of the course.	Personal Action Plan worksheet
10 mins	Participants form pairs and discuss what they have written.	
5 mins	Ask participants to write themselves a personal message using the Personal Message worksheet. Explain that this message will be sent to them after 2 months as a reminder of one of their important action points. Participants hand this to facilitator who keeps the completed Personal Message Worksheets for two months and then sends the messages using email or SMS.	Personal Message worksheet

Personal Action Plan

1. The key insights I have gained from attending this course are:

2. I intend to use these insights in the following ways:

3. The first action I intend to take to put my ideas into practice is:

4. Some problems I may face in trying to use what I have learned are:

5. Some ways I could overcome these problems are:

Personal Message

Even with the best of intentions, it can be easy to lose track of your action plan ideas after you return to the 'busyness' of daily work life following a course.

In order to help a little with this problem you are invited to send a 'postcard' to yourself as an 'aide memoire' via the course facilitator. Please complete the following. The message will be sent to you six weeks after the end of the course!

To: (your name)_____

From: Myself

Email address or cell phone number (with country code):_____

Subject:
Memory jogger from the Learning from Evaluation Course

Message to myself:

Session 14

WRAP UP AND COURSE EVALUATION //////////////

SESSION OVERVIEW
- Facilitator reminds participants of the course objectives and program.
- Participants evaluate the course
- Facilitator closes the course

RESOURCES
PowerPoint presentation

Course Evaluation Form (on separate Excel file)

WRAP UP		
5 mins	Use PowerPoint to remind participants of the course objectives and program and the key learning points. If photographs have been taken these can be shown as a slide show to remind participants of activities and sessions.	PowerPoint Slide show of photos (if available)
COURSE EVALUATION AND CLOSE		
15 mins **5 mins**	Ask participants to complete the Course Evaluation Form. Closing comments and thanks to participants	Course Evaluation Form

Program Evaluation Form

WORKSHEET ///

(Note: Facilitators can adapt this format or use their own.)

Program Title: Learning in Partnerships

Date / Time:

Venue:

SATISFACTION EVALUATION

PROGRAM AREA	PARTICIPANT SATISFACTION (place an "X" in the appropriate box)						
	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Not Applicable	No Answer
Program Content							
Content of the program							
Relevance of content to your work							
Concepts were clearly explained							
Course Duration (Length)							
Program Objectives							
Objectives were relevant							
Objectives were stated clearly							
Objectives were achieved							

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Methodology and Materials

Use and quality of presentation materials

Use and quality of handouts/reading materials

Opportunities for active participation

Appropriateness of overall methods used

Logistics and Administrative Support

Pre-program communication and confirmation

Venue

Facilitator:

Presentation style/delivery

Knowledge of subject matter

Creating a positive learning environment

Involving participants

Learning Evaluation

	Completely	Almost Completely	Partially	Almost Not at All	Not at All	No Answer
To what extent did the program give you the knowledge, skills and attitudes needed to achieve the anticipated results?						

Overall Satisfaction and Learning

	Excellent	Very Good	Good	Fair	Poor
Overall, how would you rate your experience of this program?					

Probability of Achieving Results

	Completely	To a Large Extent	Partially	To a Limited Extent	Not at All
How confident are you that you will use the knowledge, skills and attitudes gained in this program in your work?					

Will you recommend the program to others? ☐ Yes   ☐ No

1. Which sessions did you find most useful for your professional development needs? Why?

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2. Which sessions did you find least useful for your professional development needs? Why?

3. Explain any "dissatisfied" or "very dissatisfied" ratings you gave above and tell us what we could do to improve these areas. (Please answer this only if applicable)

4. List examples of new knowledge, skills and attitudes that you gained from the program.

5. How would you like this program to be followed up?

6. Please make any additional comments or recommendations on how this program and your learning experience could be improved:

Thank you for your feedback.

Program

READINGS

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VIDEOS

ADB 2012 Learning in Strategic Alliances Animation

ADB 2012 Creating and Running Partnerships Animation