

Heifer International: growing a learning organisation

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Introduction

Heifer International (HI) has been applying participatory approaches to rural development for nearly 60 years. Although HI did not intentionally set out to be a learning organisation, this characteristic is inherent to its grassroots approach. HI uses livestock distribution as a means of building self-reliance and enabling smallholder farm families to make better decisions about their land and lives. Organisationally, HI focuses on building the capacity of its country programme offices and local NGO partners to work independently towards a unifying mission. An open structure allows HI to validate and incorporate the rich and diverse experience of its project holders and country offices into organisational planning and daily operations. By using a participatory approach, HI has evolved into an organisation with the capacity to facilitate and respond to change; one that co-evolves in its relationship with a dynamic and complex environment. This paper presents a review of HI's evolution as a mission-driven learning organisation, and the learning processes responsible for that evolution.

Flexibility is essential to HI's global operations across diverse and changing contexts. Flexibility without systemisation, however, tends to result in case-by-case decision making that restricts or even prohibits cross-fertilisation and organisational learning (Suzuki 1998:133–134). In the last ten years, HI has grown from an organisation operating in 24 countries with a budget of US\$8.3 million to one with programme offices in 37 countries and an annual budget of nearly US\$40 million. In this decade of exponential growth, the informal networking and shared decision making that had served HI well in the past were overwhelmed. Organisational learning that relied primarily upon the hierarchy of line management or project-donor relationships and informal (and quite limited) staff networks, was no longer adequate.

Recently, HI has been more intentionally creating an enabling, flexible environment for organisational learning. This stems mostly from an ongoing decentralisation process that was initiated partly as a response to a funding crisis in the late 1980s, with the rapid growth mentioned above providing an additional impulse. HI is complementing the decentralisation process by increasingly applying its own mission of empowerment and self-reliance to itself and its country programmes. The goal is to build the capacity of country programmes to operate more independently, while creating a more horizontal and interdependent relationship between them and the central office.

Even as HI develops or adopts mechanisms to institutionalise best practices, shared values, norms, and lessons learned, there is the danger that the systems themselves will limit learning in a kind of self-denying paradox (Argyris and Schön 1978). Without deliberately considering the learning process, organisations may limit field-level input only to contributions to outcomes set by the organisation.

This paper uses three case studies to highlight HI's effort to build systems that maintain flexibility and maximise organisational learning. An essential feature of the case studies is the attempt to cut across hierarchical lines by selecting and applying different learning mechanisms, including learning communities, councils, participatory planning, and best practice workshops. These systems create space for practitioners to share new insights and build mechanisms to integrate new learning. They ensure an appropriate means to share experience and understanding through genuine participation that directly informs implementation across the organisation.

Background to case studies

Context

HI used a series of USAID Matching Grants through the 1980s and early 1990s to strengthen capacity in several areas including training, gender, participatory development, and evaluation. As part of this process, HI developed the Cornerstones Model (CM) for community planning (Aaker and Shumaker 1996), which derives its name from HI's core values (referred to as Cornerstones). The model is a participatory community planning and management framework that incorporates several years of practitioner assessment of best practices in rural project planning. The CM is an iterative framework consisting of four components: situation definition; envisioning the future;

planning; and implementation, monitoring, and evaluation. Unique features of the CM are that it is values-based and vision-based, rather than the more conventional problem-based model. The model incorporates participants' collectively identified core values throughout the planning process.

In 1997, HI sought and obtained a three-and-a-half-year Matching Grant (MG) from USAID to help integrate the participatory process outlined in the CM throughout the organisation. The MG primarily addressed HI's challenge to enable its partner organisations to be more self-reliant and to promote sustainable community development. The grant funded three country offices (in Indonesia, Zimbabwe, and Bolivia) to implement the CM in depth and share their experience with the entire organisation.

HI initially developed the CM to build the capacity of rural, community-based organisations (CBOs) to plan and manage small-holder livestock projects. The first case study, provided by the Indonesia country programme staff, demonstrates how the CM was adapted and revised to fit their local context, and how this facilitated learning by local CBOs and NGOs and eventually throughout HI. Throughout the grant period, and driven by experiences in the pilot countries, the CM took on increasing importance as a strategic planning framework. HI eventually adopted the CM for strategic planning in all departments and country programmes, and this process is presented in the second case study. Heifer International's Agroecology Initiative, presented as the third case study, also used the CM.

Learning framework

The learning processes presented in the case studies highlight the participatory nature of the efforts, and the design and selection of appropriate mechanisms to feed back rapidly into the processes themselves. While each case study demonstrates a different approach to institutional learning, they all aim to create opportunities for practitioners to reflect on their practice in relation to others in the organisation. Examples include the creation of a learning community; the deliberate, iterative process of practice and reflection (*praxis*) used in the strategic planning process; and the organisation-wide, case-study approach employed by the Agroecology Initiative. By employing diverse learning mechanisms, HI is refining its capacity to determine those that work best in different circumstances. In this setting practitioners are both active learners and are committed to sharing and learning in ways that allow consensual understanding or new

meaning to be reached. Furthermore, in this system the learning individual is reconceptualised as part of the learning organisation.

Each case study describes a deliberate, facilitated, two-way learning process rather than an incidental or unexpected one. The primary intention is to learn from participants who are then responsible for passing on the learning to others. In the first case study, the central office initiated CM planning, and then control of the process gradually shifted to country programme staff and project partners. This critical shift in ownership allowed the CM to take on a life of its own and, as will be demonstrated, to contribute directly to organisational learning. HI intends to promote sustainability and organisational learning through a similar transfer of ownership in both the strategic planning and the Agroecology Initiative. In the Indonesian and strategic planning case studies, the central office instituted learning mechanisms through programme design: each of the programmes began with training workshops, followed by field practice, and then by structured events to stimulate reflection. In the case of the Agroecology Initiative, the learning process began by gathering and interpreting lessons from the field.

The case studies show how learning from the field can directly inform organisation-wide practice. For example, the Indonesia experience led to the use of the CM as the foundations of the strategic planning process in HI, and the Agroecology Initiative brought values and perspectives from the field, which led to a renewed organisational commitment to environmental education and protection. This is especially evident in the planning and design of HI's proposed new Global Village project, an interactive public-education facility.

Finally, the case studies illustrate how the HI central office gradually changed from simply instigating and managing institutional initiatives to deliberately facilitating and systematising organisational learning.

Case 1: Heifer Project Indonesia country programme

This case study highlights Heifer Project Indonesia's (HPIndonesia's) proactive learning approach. The focus is on learning from applying the CM in NGOs and CBOs, because this eventually influenced HI-wide activities (discussed in the second case study). HPIndonesia is one of eight country offices in the Asia and South Pacific Area. Each office has between 10 and 15 staff who develop their programme based on the local situation. HPIndonesia came into being as a full-time country office in October 1997, coinciding with the start of the MG, and currently has eight staff.

The MG significantly influenced the new HPIndonesia country programme, providing a conducive environment for HPIndonesia to experiment with an atypical approach. A typical HI approach is to solicit, screen, and approve project proposals, with capacity building often carried out around these binding relationships. HPIndonesia, however, believes that capacity building for many small NGOs, especially in community planning, should precede a project's approval. Managing a project is considered to be only one organisational capacity. HPIndonesia made use of this freedom to be a proactive learner, building upon the basic training and guidance provided by HI through the MG. Finally, because it was a new country office, there was no resistance to change.

Indonesia context

Factors shaping the direction and evolution of the HPIndonesia programme include the newness of the country office, the MG, and the local political context and its effect on the situation of local NGOs.

Indonesia was under the dictatorship of Suharto for 32 years. The Asian economic crisis which began in mid-1997 helped lead to his demise in May 1998. Three decades of Suharto's rule, however, had drastically suppressed the development of civil society leaving the corrupt, centralised government as the main role model for development. Its approach was predominantly top down, paternalistic, and required little accountability. The repressive political situation also led NGOs to follow survival strategies. Especially on Sumatra, this involved staying small and silent to avoid attracting attention. Often, NGOs remained one-person shows, which would collapse if that individual left, and frequently they simply replicated much or part of the government's approach to development. CBOs were often temporary organisations formed to access resources provided by government programmes. With the change of government in 1998, more funds were made available, resulting in a flourishing of organisations created simply to access these funds. The government, however, mainly considered NGOs as contractors to carry out its own programmes.

HI chose Indonesia as one of the three MG country programmes primarily to see its impact on a new programme. The MG was designed with some input from the HPIndonesia country representative before the office developed a strategic plan. The grant authorised activities that focused on developing capacity in HPIndonesia and partner organisations involving the CM, learner-centred education, and gender.

Given this background, HPIndonesia decided to work through local NGOs to reach families in need and to have a sustainable impact. After visiting and surveying local NGOs in Sumatra, however, it saw a great need for organisational capacity building and that going straight into funding farm-level projects with local NGOs risked a high failure rate. As a new programme, HPIndonesia was aware that it too needed capacity building in many areas. The challenge was to determine the most appropriate approach to address these needs, and the solution was to form a Learning Community of local NGOs (discussed below).

Indonesia learning framework

Two concepts guide HPIndonesia's approach to learning. First, the programme focuses on the organisation, not the individual or the project, as the unit of development (Holloway 1997). HPIndonesia's experience is that many development and capacity-building efforts are not sustainable because they focus on either the individual or on projects. For example, individuals are trained in a particular issue, but do not share this within the organisation. Most activities are project-oriented, with little thought given to building organisational capacity to continue beyond the project. Thus, instead of immediately funding projects, programme staff sought means to help local NGOs build their capacity to facilitate community development. This mode of thinking is not typical of most development efforts with Sumatran NGOs. In fact, because of frustrations in trying to develop local NGO capacity, a large local support NGO (Bina Desa) switched, a few years ago, from working with local NGOs to training a cadre of individuals to work directly with CBOs.

HPIndonesia uses the onion model of an organisation, among others, to discuss organisational issues. An organisation, like an onion, grows from the inside outwards. At the heart of the organisation lie its values, identity, and worldview. Many local NGOs focus more on the outer layers, such as physical and financial resources, often neglecting the important core issues.

Second, HPIndonesia encourages organisations (including itself) and trainees to embark on an ongoing cycle of application and reflection (*praxis*) of new skills and knowledge in their own work, before they train others (e.g. in using the CM, or gender awareness and sensitivity). Often, NGO staff attend a training event and immediately want to train CBO members in the topic, without applying what they have learned to themselves first. This can result in rapidly decreasing depth and effectiveness of subsequent training activities.

Country programme development

In November 1997, a month after the full-time country office was established, HI held the first CM training in Indonesia for HI country programmes in the Asia and the South Pacific Area. This was the first CM training organised by the HI central office which was then promoting the CM to use with CBOs for livestock project development. HPIndonesia, being a new programme, did not have a ready testing ground of NGOs and CBOs to implement the model, but the country programme did need to develop a strategic plan, and programme staff quickly realised that the CM was an appropriate tool.

The CM framework itself is a learning process when it is participatory and iterative (i.e. not just done once in order to plan a project and apply for funding). HPIndonesia developed and reviewed its strategic plan every six months, eight times in total from March 1998 to November 2001. As a new country programme they considered this essential because the iterative nature of the CM allows for internal learning about the organisation itself. New and old staff gain and maintain ownership because it is a participatory process. Using the CM for strategic planning also allowed programme staff to learn more about the model before trying to train others in its use. For example, they developed methods on how to better integrate values into all aspects of the CM, and how to undertake issue identification and analysis that was tied directly to the vision.

Learning community

Instead of using projects to develop relationships with NGOs, programme staff formed a Learning Community (LC) of 20 local NGOs (including HI). NGOs could belong if they worked in community development in rural areas and if they formed and strengthened CBOs. In the LC, NGO staff practised using the CM in a membership organisation. This also allowed HPIndonesia to learn with other NGOs, which is essential for a new programme. At first, MG-supported activities (i.e. the CM, learner-centred education, and gender) mostly determined the agenda. Initially, HPIndonesia did not fund any of the LC members, except for one NGO that the HI central office had directly related to previously.

The LC uses training, follow-up workshops, mentoring, external consultants, study visits, a newsletter, and informal meetings to share experiences among members. The full LC also shares experiences in an Annual Learning Community Consultation (ALCC), and every two

years an administrative group focuses on rules, membership, and strategic planning. Thus far, programme staff have applied and shared experiences about the CM, gender, learner-centred education, and organisational self-assessment.

The first item that HPIndonesia introduced at the first ALCC in late 1998 was the CM. HPIndonesia knew from experience that NGO staff would need to apply the basic CM training themselves, before working with CBOs. Thus, the LC used the CM to develop its strategic plan during the initial ALCC. The main benefits from this approach were that NGOs learned more about the CM by applying it in this way, and it quickly became a well-known term, although not fully understood initially.

NGOs only began to understand the CM better after a few of them tried using it with CBOs during 1999. NGOs are usually tempted to use the CM first with CBOs, without applying it in their own NGO (many see this as a way to get HPIndonesia project funding). HPIndonesia helped the NGOs facilitate these workshops, because there was not yet any experience within the LC of using the CM with CBOs. This learning was captured in a training module for CBO-level workshops, developed directly from these early workshops. A lot of interest was generated when NGOs shared their experiences during the third ALCC in 2000.

HPIndonesia also developed a series of *learning grants* to assist selected NGOs to use the CM with CBOs. These comprised *planning grants* (of US\$80) to help NGOs try out the model with two CBOs initially; *mentoring grants* (US\$25) which paid for travel and accommodation for an experienced NGO staff member to co-facilitate the CM with one CBO partner of another NGO; and *pilot grants* (of US\$425), one per NGO, to support a small livestock-based activity arising from a planning grant. Eleven NGOs eventually conducted workshops with over 20 CBOs, and some of this learning was incorporated into the training module (now called the 'CM Toolkit for CBOs'). The NGOs shared this field experience during the fourth ALCC in October 2001.

Many of the NGOs have developed a deeper understanding of the CM through using it with CBOs. This has directly resulted in four NGOs requesting HPIndonesia staff to help them use it for their own strategic planning. The experience of using the CM for strategic planning in these NGOs and in HPIndonesia has been compiled into the 'Cornerstones Model Toolkit for NGO Strategic Planning', reflecting our own improved understanding of how NGOs can use the CM for this purpose.

Short-term effects

The LC will conduct an evaluation in two years' time to measure the effects on their own organisations and, more importantly, what effect it has had on CBOs. Currently, HPIndonesia has only some short-term observations to share.

There are noticeable attitudinal changes among the LC members. A combination of learning approaches, mentioned above, have influenced most members to direct their focus away from the outer to the inner layers of the onion (strategic planning, gender, governance, fundraising strategies, etc.). By continually stressing that the LC is for learning at an organisational level, NGOs have also moved from seeing HPIndonesia simply as a potential project funder, to being also a learning partner. They have shifted from thinking that they had to train CBOs in every topic they learned about, to focusing on applying these topics to themselves as well, if not first. As one female NGO director said in closing the fourth ALCC: '... before, we thought gender was only for others, now we realise that it is also for ourselves'.

At the fourth ALCC, in addition to five NGOs already using the CM, 13 NGOs planned to use it to develop a strategic plan in 2002. Fourteen NGOs have already used the CM with over 70 CBOs. Recognising that the CM is an iterative process, these NGOs plan to continue using it in the future.

To ensure the LC was based on members' needs, rather than on what the MG supported, the LC began an Organisational Capacity Assessment (OCA) in March 2001, which led to the formulation of an OCA tool. This process was facilitated by PACT-Indonesia, which visited each of the 16 participating NGOs to help them carry out a confidential self-assessment using the OCA tool. Each organisation then developed an action plan that it could execute by itself. At the fourth ALCC, each NGO shared their unmet needs to attain a vision of a high-capacity NGO. In addition to following up on the CM and gender, new LC learning topics (the agenda is no longer driven by HPIndonesia) include fundraising strategies, governance, and documentation and reporting systems. Each learning topic focuses on the innermost parts of the onion model, indicating that LC members realise the importance of the inner layers in developing sustainable, effective organisations.

Intra-HI learning

HPIndonesia's use and adoption of the CM provided the foundation for an HI-wide movement in CM-based strategic planning.

HPIndonesia realised that the initial strategic planning outline provided was not congruent with using the CM. Indeed, HI had developed the strategic plan outline before the CM and did not immediately integrate the two methods. HPIndonesia suggested that HI modify the strategic planning outline to fit the CM results. It also encouraged the central office to use the CM internally, instead of simply teaching others how to use it. Programme staff shared their experiences in using the CM and some of the techniques they developed in internal working papers and at a CM reflection workshop held in Bolivia in 2000. A booklet highlighting the learning from the Bolivia workshop, including an outline of how HPIndonesia uses the CM for strategic planning, was distributed throughout HI. An HPIndonesia staff member shared their experience with the CM by co-facilitating the HI international training workshop on strategic planning, discussed in the next case study.

Case 2: HI strategic planning

Strategic planning context

HI initiated strategic planning processes in the early 1990s by adapting a model developed in the banking industry. The central office disseminated the model to country programmes with little or no training in its use, and incorporated only minimal feedback into its design. Consequently, most strategic plans submitted to the central office looked alike, were of short duration, and were more operational than strategic. They fell short of portraying the unique characteristics and needs of each country programme due to the strict adherence to a predefined structure.

Several factors led HI to adopt the CM for strategic planning throughout the organisation. These include the parallel development of the CM for community planning and its implementation throughout the organisation for use with partner organisations, the experience of the Indonesia programme in applying the CM for its own strategic planning, dissatisfaction with the existing planning model, and HI's move towards applying to itself the practices and philosophy that it applies in its projects and with its partners. The CM-based strategic planning process was field tested during 2000 in South Africa and Nepal and with the Asia and South Pacific Area team. Learning from these initial trials led to its further refinement and the initiation of the process described below.

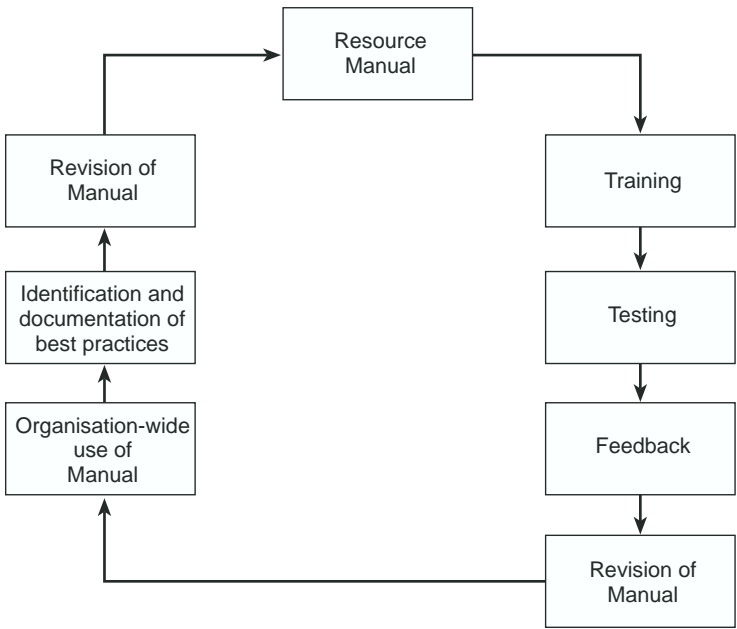
Participatory methods for strategic planning demand greater capacity. HI soon realised that flying staff out from the central office to conduct strategic planning workshops around the world was not feasible. This resulted in the recruitment of field-based Planning, Evaluation, and Training Coordinators (PETs) and the development of a resource manual with guidelines and a design for a strategic planning workshop.

Strategic planning learning framework

Figure 1 depicts the model that HI used to learn from the strategic planning initiative. The learning took place in four phases: training on the use of the resource manual; testing; feedback; and revision. Beyond these are three virtual phases that take place in the context of organisation-wide learning and reflection: the use of the resource manual, identification and documentation of best practices, and revisions to the resource manual to incorporate best practice.

The first phase was an international training workshop for the PETs in December 2000 to introduce the resource manual and workshop design for strategic planning. The workshop used the methodology

Figure 1: HI learning model for the strategic planning initiative



developed for the strategic planning workshops to train the participants in its use. At the end of each workshop session, participants commented on what had gone well and suggested improvements. The PETs received a revised version of the manual shortly after the workshop.

In the second phase, the PETs and central office staff jointly tested the resource manual and the workshop design in six countries over six months. The PETs were in a good position to capture and articulate the learning from their field-based workshops. After they facilitated workshops, they e-mailed comments and feedback to all participants. This gave everyone the opportunity to benefit immediately from the experiences of fellow facilitators.

The third phase occurred in July 2001, when staff who had tested the resource manual met for a second workshop, capturing the experience of the test phase to further refine the manual. The greatest benefit of this meeting was the opportunity to discover the diversity of understanding and application of strategic planning and terminology in different contexts.

The final phase is the incorporation into the resource manual of feedback obtained during the second workshop and lessons learned from the test phase.

Key lessons from the field-based learning process

The PETs provided and enhanced the opportunity for learning. With their multi-country responsibilities, they capture learning from across the organisation. The use of *praxis*, as in Indonesia, was a critical part of the learning process. The HI Planning and Evaluation Team created and used learning space. The ongoing dialogue and documentation of lessons ensured that the learning became part of the institutional memory.

International workshops involving skilled staff from all areas of the organisation provided the learning space necessary for intra-institutional learning to take place. The documentation and rapid dissemination of the workshop outcomes through the flexible strategic planning resource manual institutionalises this learning and makes it available throughout the organisation very quickly. Working across several country programmes, PET Coordinators learn from diversity and bring that learning back to the learning space facilitated by central office staff.

Having benefited from this learning model, HI will need to extend it to other initiatives. The next step will be to use the same model for training facilitators to conduct Project Self Reviews and Programme

Reviews during 2002. Here again, the PET Coordinators have a critical role in the learning process. Eventually, they will build capacity in country programmes to enhance intra-country programme learning. This will help test area- and country-specific methodologies, and learning from the area and country levels will be incorporated into the overall learning of HI.

Another important space for learning will be annual PET meetings. These will be forums for a more active exchange of learning, for identifying areas that have potential for organisational learning, and for presenting unique situations from the field that can lead to organisation-wide learning.

Case 3: HI's Agroecology Initiative

Agroecology context

As part of its continuing efforts to improve its programmes, HI identified 2000 as its 'Year of the Environment'. In previous years, the choice of priorities had focused on, for example, gender and other areas of HI's programme. HI established an Agroecology Initiative to coordinate a range of new and existing programme activities and a new strategic emphasis. A member of the Organisational Development Department (ODD) coordinated the process, although the driving force came from the International Programmes Department. The specific focus on improving the environment is not new for HI – the concepts behind it reflect the organisation's core mission and values. Although these values have long been incorporated into its programmes, this has been achieved without a strong overarching strategy. Driving the Agroecology Initiative were the primary impact of agroecology project activity on HI country programmes, and a desire to learn from some of the best experiences from both within and outside HI to improve its programmes. The development of a field-driven initiative was highly appropriate for the new CM planning model that HI had been adopting.

The Agroecology Initiative built on HI's work with smallholder and subsistence farmers to improve agroecological practices that protect and enhance natural resources. The Initiative also included a significant educational element to raise public awareness of the values and opportunities for multiple aspects of sustainable agriculture. The new resources and focused alignment with ecological objectives helped the Initiative to integrate into all HI programmes.

HI formally launched the Agroecology Initiative in 2000 with financial support from the Sandy River Charitable Foundation, a funder that had previously established another new initiative in the area of disaster relief. The Sandy River funds specifically enabled the HI learning process, providing for a diverse range of research and documentation throughout the year. A consultant led the self-assessment, which included:

- 14 case studies and papers prepared on global Best Practices Models project activity;
- regional meetings in Tanzania, China, and Romania on sustainable agriculture and ecology;
- presentations to HI Board and staff on the findings of the case studies and the consultancy;
- a database summarising agroecological and environmental aspects of nearly 550 HI projects in more than 50 countries;
- an agroecology intranet site and listserv for international communication;
- a CD-ROM entitled 'Sustaining Life on Earth' used to disseminate the information collected;
- an agroecology video;
- pages dedicated to agroecology in the HI magazine *World Ark*.

A Global Roundtable held in Ecuador culminated a year of coordinated, organisation-wide learning. The meeting focused on sharing information and on developing the HI Agroecology Strategy. The 40 participants included HI staff and representatives of organisations collaborating in ecological and conservation activities covering diverse projects such as aquaculture and water quality monitoring in the Philippines, habitat preservation in the Amazonian rainforest, and sustainable agricultural practices (hillside terracing) as a defence against hurricane damage in Honduras. The Roundtable featured case studies from numerous HI country programmes, field trips to community practitioner sites, a cultural programme, and also addressed the spiritual dimensions of conservation work through a keynote speaker, Calvin DeWitt of the Au Sable Institute.

The Roundtable was a milestone experience for participants, most of whom are career professionals already dedicated to the issues. The success of the Roundtable, therefore, was its effectiveness in refocusing an existing and comprehensive global strategy to the

agroecology framework. A new sense of mission, the idea that their work was indeed *saving the earth*, inspired the participants. The challenge then remained to disseminate this new vision to a global audience and gain the participation of all sections of HI for its full integration. An adaptation of the CM was the basis for the design of the Roundtable and contributed greatly to its success.

Agroecology learning framework

The learning framework followed by the Agroecology Initiative was composed of three main phases. The first captured existing experience and learning across the organisation. The second consisted in sharing that information during the Roundtable, and the development of an institutional strategy for agroecology. The third phase is the coordination and implementation of that strategy through the setting up of an Agroecology Council.

An essential aspect of the new learning framework for the Agroecology Initiative was its alignment with traditional HI programmes. All HI projects already include significant agroecology activities and they all address sustainable practices and natural resource management – HI has been doing this work for nearly 60 years. However, the new framework did more than just validate an existing strategy. It identified essential cross-organisational areas of planning, communication, and task assignment. It created a space for intra-organisational learning, and contributed to a significant area of institutional memory, which had previously not received much attention. The framework also revealed that an organisation-wide initiative required a new process of working together.

Participants at the Roundtable specifically identified the need for a learning strategy that allowed maximum interpretation from the field and minimal imposition of new organisational policy or structure from HI central office. The challenge was to establish a mechanism to achieve full representation and to facilitate cross-institutional learning, but which avoided creating new layers of administrative review and accountability. As an appropriate implementation technique the Agroecology Initiative selected the same process of decentralisation that HI was implementing to maintain its recent growth and expansion.

An Agroecology Council was established and has responsibility for the development of the Initiative's core strategy. Members of the nine-person Council included representatives from all HI divisions, including country

programme directors, fundraisers, educators, and a Board member. The only new position assigned to the Initiative was a Programme Assistant. The Council's mission was to provide leadership for the Initiative and to recommend a strategy that used as many existing systems as possible in new and innovative ways. The matrix management structure of the Council was itself a learning process. The representation process demanded that all Council members be fully informed of their own division's strategic plans and that each member serve as an effective liaison to present Council and field decisions to central office staff.

Through the Council, the Agroecology Initiative has offered HI a unique opportunity to transform and adapt itself. In late 2001, the Council developed a strategic plan that assigned all components of the Initiative to appropriate divisions within HI, thereby ensuring its full integration.

The learning strategy here is one of a central goal with multiple objectives and activities. The Agroecology Initiative has established organisational goals and provided guidance on how to achieve them. However, their achievement is dependent on the integration of agroecology objectives at departmental levels so that agroecology does not become a separate activity, but is integrated into the regular planning mechanisms of HI. Examples of activities that are a consequence of this process are capacity building of country programme staff, new indicators for monitoring and evaluation systems, fundraising, building strategic alliances, and public policy. Current public policy issues include genetically modified food and the influence of transnational agricultural corporations.

Just as agroecology promotes diversity of species and habitat, so the HI strategy encourages a diversity of responses. As agroecology promotes sustainability and holistic systems, the HI strategy aims for an ongoing and comprehensive structure. Furthermore, it reflects the increasing decentralisation of HI, because field experiences and feedback define and drive the strategy. The impact is seen both in the field and in administration. The lessons are learned on multiple levels and will certainly influence the development of future thematic initiatives within HI.

Conclusions

The establishment of diverse learning mechanisms within HI has enabled initiatives emerging from both the central office and the field

to have a major positive impact on HI's operations. The different learning mechanisms described here show how it has been possible for a growing organisation to learn from its experience and consequently reorient its processes. Critical to this success is the lack of central control over the content of these processes, even when the central office provided the resources to facilitate them.

Even when activities were initiated by the central office (such as in the Indonesia and Agroecology cases), the freedom provided to field staff to orient those initiatives to their own needs was critical to their success. In the Indonesia case, the HI central office provided a new country programme with the basic tools of the CM. HPIndonesia applied this and other basic tools provided by HI to develop and strengthen its own programme. This internal experience was then used to begin a capacity-building process with local NGOs and CBOs through the LC, which in turn further strengthened HPIndonesia's own capacity. Finally, they were able to pass back their experience in using the CM for strategic planning to the HI central office.

In the strategic planning case, the central office refined and promulgated an idea primarily promoted by the HPIndonesia country office. HI shared this idea with country programmes throughout the world, rather than having it remain in one field office. The learning process used with the strategic planning methodology led to rapid and effective institutional learning. It was possible to update and adapt the methodology within a period of six months from experience gained in five continents. The use of the PETs and the learning that they harnessed resulted in establishing centres of excellence. Without the PETs, the learning would have been a much slower and less rich process, as central office staff would not have been able to benefit from such a broad and diverse set of experiences.

In addition, although facilitators from the central or country programme offices initiated and facilitated the processes, responsibility and control gradually shifted, or is in the process of shifting, to the programme participants. This is especially evident in the Agroecology Initiative where a participatory Agroecology Council emerged to move the process forward and facilitate communication between the field and administration. In Indonesia, the LC is now determining the learning agenda, which was initially led by HPIndonesia. Country programmes, assisted by the newly-created PET Coordinators, are assuming greater responsibility for, and control over, the strategic planning process.

The HI experience demonstrates a potential role for the central office as initiators and facilitators of learning processes. The challenge is knowing how and when to step back so that the processes gain a life of their own. HI continues to strive to institutionalise learning systems without having the systems themselves limit the process.

Future directions at HI

The need to develop new ways of learning organisationally will continue to be a focus at HI. The ongoing challenge will be to adopt learning approaches that allow the organisation to respond to the diversity and complexity of rural development without restricting flexibility. The vision of HI in the future, consisting of a network of interdependent members, requires the development and integration of learning processes that will match the fluid nature and diverse needs of its constituency.

The ODD, developed as a consequence of the MGs mentioned above, is devoted to organisation-wide capacity building. The ODD develops and facilitates training and learning programmes in areas deemed critical to the organisation and now has specialist teams in the areas of planning and evaluation, training, gender, governance, and fundraising training. The ODD has the specific role of stimulating the creation of learning spaces across the whole organisation without controlling them. As a unit, the ODD is learning from the processes already in place, and will use its experience to help HI to move towards its vision of itself in the future. An essential component of this organisational role is for the ODD, together with its constituency, to reflect continually on its practice and to be aware of the inherent tendency for organisational systems to restrict learning. The commitment of significant resources in this area is a clear demonstration of HI's dedication to institutional learning.

Organisational learning systems must institutionalise ways of creating enabling space. They must allow practitioners to explore their own actions and ways of knowing in relation to those of others in the organisation. Thus, practitioners must not only be active learners, they must also be committed to sharing and learning in ways that allow consensual understanding or new meaning to be reached. The critical component of an effective learning organisation is to validate and prioritise these fresh insights and integrate them into, or allow them to transform, organisational practice. In this sense, the learning organisation and the learning individual are the same.

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