

## **Localised Learning: Unleashing Local Capabilities through P2P Learning**

### **Background**

As part of its efforts to support peer-to-peer (P2P) approaches to facilitate institutional reform, the Effective Institutions Platform (EIP) is organising a series of learning events to reflect on key attributes of effective P2P partnerships, and to consider the role of monitoring, evaluation and learning (MEL) in tracking and supporting these approaches.

An initial stock-taking of experiences among EIP Advisory Group members, captured in the report *'Lessons Harvesting: Learning from P2P Engagements'*<sup>1</sup>, identified three features of effective P2P approaches: (i) the importance of building *trust and mutuality*, (ii) the function of *learning through inter-connected systems* and (iii) the need to *adapt P2P approaches for the diffusion of local learning*. Each topic is the subject of a learning event, the outcome of which are a series of learning notes that can be used as a reference tool by EIP members and partners to guide and enhance their P2P partnership approaches.

### **1. Introduction**

In contrast to much traditional 'capacity building' and expert-driven technical assistance, P2P learning often builds on the idea that peers learn directly from one another's experiences, with lessons being assessed and adapted to fit local contexts and circumstances. By comparing, contrasting and testing new ideas between peers as equals, rather than having solutions imposed from more powerful external partners, capabilities are not 'infused' from the outside. Rather, capabilities are 'unleashed' through a process of internal identification and negotiation (e.g. between technical officers and their supervisors) and benefit from external validation.

Unleashing rather than supplanting or substituting local capabilities – skills, knowledge, resources, social norms and priorities – can enhance the **sustainability** of change efforts by fostering ownership and aligning to locally defined agendas and incentives. This process can also **improve performance and outcomes**, including by avoiding over-ambitious or ill-fitted reforms that can weaken capabilities and thus do more harm than good. Unlocking the potential of existing institutions and capabilities (latent or active) may also boost the **ownership and legitimacy** of local leaders and stakeholders, which in turn may improve their **accountability and responsiveness**.

MEL can play a role in how to track these localised change processes. If purposefully crafted, MEL in P2P partnerships can be used to introduce the right **incentives** to capture the **tacit knowledge** of localised learning. This can include more explicitly recognizing and cultivating **endogenous skills** in a given change process, while avoiding the risk of substituting, displacing or even weakening existing capabilities.

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<sup>1</sup> Ørnemark & EIP 2020:

[https://www.effectiveinstitutions.org/media/EIP\\_Lessons\\_Harvesting\\_Final\\_Version.pdf](https://www.effectiveinstitutions.org/media/EIP_Lessons_Harvesting_Final_Version.pdf)

Starting with a brief overview of the common characteristics of peer learning partnerships at the subnational level, this note explores some of the key features of P2P approaches that may be conducive to unleashing endogenous capabilities and catalysing experimental problem-solving, change and innovation. This is followed by a consideration of how these processes can be better documented, guided and built upon using MEL.

## 2. Peer partnerships at the sub-national level: localised learning in practice?

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*Localisation is understood as a process of empowering local stakeholders, by premiering local priorities, needs and capabilities.*

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According to the EIP's mapping of international initiatives that use P2P methods to support institutional development and reform, 25% of existing efforts identified 'decentralisation and subnational government' as their main thematic focus<sup>2</sup>. One estimate found that already in 2006, about 70% of all municipalities had established linkages with municipalities in other parts of the world, much of which included various forms of peer learning.<sup>3</sup>

Part of the reason why P2P learning has taken off at the sub-national level has to do with the broader agenda to '**localise development**'. The growth of sub-national peer learning in development has been driven by several factors, including mega trends such as **urbanisation and climate change**, which is putting increased pressure on specific localities, such as cities, municipalities and regions. The SDGs and the New Urban Agenda both emphasise 'localisation' and the crucial role of local governments in achieving sustainable development objectives. In the context of Agenda 2030, 'localisation' has gone from denoting the *implementation* of nationally set goals at the local level, by sub-national actors, to recognising the role of **local governments as policy makers and change agents** with crucial links to local communities<sup>4</sup>. Strategies are not imposed from the top but take into account local contexts, endogenous conditions, skills and resources. Given these trends, this note asks: What are the features of P2P learning that may support localisation as part of this process? And what are the mechanisms through which localised P2P partnerships could unlock and release endogenous skills and capabilities? The following section explores a few key attributes.

## 3. Key attributes of P2P approaches conducive of localised learning

### 3.1 Enabling local problem solving and adaptation

The need to adapt external lessons to local contexts is often implicit in P2P learning. Rather than importing fixed solutions and 'best practice', the idea is that peers learn directly from one another's experiences, and that these lessons are assessed and adapted to fit local contexts and circumstances, including through collaborative problem solving approaches. This model of P2P learning – which is underpinned by a recognition of the messy and locally contingent nature of public sector reform initiatives – is part of a wave of alternative approaches to support institutional reform that has

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<sup>2</sup> EIP 2019

<sup>3</sup> UCLG 2006

<sup>4</sup> See for example <https://www.local2030.org/>

emerged in recent years. Sometimes referred to as the ‘second orthodoxy’<sup>5</sup>, this new set of ideas and practices are informed by growing scepticism of the impact of traditional TA and enhanced appreciation of the non-linear, complex and political nature of **how change actually happens**<sup>6</sup>. This has catalysed a shift towards locally led, context sensitive and politically informed approaches as exemplified by exploratory initiatives and communities of practices such as ‘Doing Development Differently’, ‘Thinking and Working Politically’ and ‘Problem Driven Iterative Adaptation’ (PDIA).<sup>7</sup> Although a diverse agenda, these approaches share a common interest in building deeper understanding of and closer adaptation to local contexts, and in seeing development and **institutional reform as fundamentally political processes**<sup>8</sup>.

Several features of P2P approaches can contribute to local problem solving and adaptation. For instance, formal institutionalised peer learning mechanisms can help to address local implementation challenges by diffusing knowledge and triggering innovation. Kenya’s **Maarifa Centre**, a locally (country) led P2P-oriented knowledge sharing platform on devolution that is fully institutionalised as part of the Council of Governors<sup>9</sup>, organises knowledge sharing and peer learning activities, documents county development solutions and hosts resources on county service delivery performance<sup>10</sup>.

Embedding a peer learning mechanism within the national institutional architecture would typically require broad alignment with the interests and incentives for change as articulated by the county’s underlying political settlement. The legitimacy derived from a shared understanding of the bigger challenge, such as that of managing devolution, may grant county governments sufficient authority and acceptance to experiment; to share, validate and adapt solutions to locally contingent problems. This dynamic could also be a factor contributing to the Maarifa Centre’s apparent success as a catalyst of local innovation. The centre organises, for instance, county innovation forums, a national peer learning summit on participatory budgeting, and several sectoral peer learning activities<sup>11</sup>.

Similarly, the **Melayani** programme in Indonesia, a programme designed to strengthen local government capabilities, had considerable success in building local government capacity to address service delivery problems at the district level, partly by recommending that the central government provide opportunities for local government officials to share experiences of effective solutions across districts, for example through the establishment of a national forum or peer learning platform<sup>12</sup>.

An area for further exploration would be to consider if and how localised P2P learning may complement, inform, or be informed by, thinking and working politically, and vice versa. Consider, for example, the extensive work under the **Coalitions for Change Programme** in the Philippines by the Asia Foundation, often cited as a successful example of thinking and working politically. A particular insight of the programme was that it tended to be most effective when working directly with local leaders, teams and individuals “extremely well versed in both the technical aspects and the political

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<sup>5</sup> Teskey 2017

<sup>6</sup> King 2020. See also Booth 2012; Bridges & Woolcock 2017

<sup>7</sup> See for example Booth & Unsworth 2014; McCulloch & Piron 2019; Algoso & Hudson 2016; Andrews, Pritchett & Woolcock 2017; Dasandi et al 2019.

<sup>8</sup> See for example Carothers & de Gramont 2013.

<sup>9</sup> The Council of Governors represents Kenya’s 47 counties.

<sup>10</sup> World Bank 2019. See also [www.maarifa.cog.go.ke/home](http://www.maarifa.cog.go.ke/home)

<sup>11</sup> The Maarifa Centre won several awards in 2018 for its work in promoting innovative peer learning, including the Kenya Public Service Innovation and Excellence Awards, and an International Innovation Award in Indonesia. See World Bank 2019.

<sup>12</sup> McLaughlin 2020

dynamics at play in the policy arenas in which they are working”<sup>13</sup>. Such ‘development entrepreneurs’, situated within or outside the bureaucracy, often drive reform by taking risks and acting as ‘positive deviants’<sup>14</sup>. Importantly, they may seek out allies or peers elsewhere to get new ideas and innovate in their own context, while maintaining autonomy and room for manoeuvre within the national context.

### 3.2 Supporting local leadership, agency and ownership

As explored in the EIP’s other learning notes and the lessons harvesting report in this series<sup>15</sup>, there is strong evidence that developing and sustaining organisational capabilities, and effecting developmental change more broadly, depends on **effective leadership**. Leadership matters to drive and sustain public sector capabilities<sup>16</sup>, to improve service provision<sup>17</sup>, and to form coalitions and create the legitimacy needed to drive reform<sup>18</sup>.

Leaders can exist at any level – community, local, regional, national, formal or informal<sup>19</sup>. They can be bureaucrats, politicians, activists, citizens, farmers or managers. Andrews highlights the function of different forms of leadership for the purpose of P2P approaches, noting that they each have their own attributes. For example, “agents in positions of formal power can authorize a new change process, for instance, and yet agents located in more peripheral social positions are required to provide the creative ideas that inform change experiments and the knowledge about what implementation challenges lie ahead”<sup>20</sup>. Like agency in general, the power and influence of leadership increases as it becomes more collective, as support is mobilised and coalitions are formed<sup>21</sup>.

The contingent nature of institutional reform<sup>22</sup> also highlights the importance of **tacit knowledge among local agents and leaders** in building public sector capabilities<sup>23</sup>, and Andrews and Manning<sup>24</sup> have highlighted the virtues of P2P approaches in enabling tacit knowledge around managing politics, inspiring local teams and actors, and building coalitions, for example.<sup>25</sup>

In Ghana, for instance, the innovations that worked to enhance bureaucratic effectiveness were driven by “local agents with deep lived experience of both the local environment and large formal organisations”. The main implication for development practice, writes McDonnell, may be to

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<sup>13</sup> Sidel & Faustino 2019

<sup>14</sup> Ibid.

<sup>15</sup> Accessible at [effectiveinstitutions.org](http://effectiveinstitutions.org)

<sup>16</sup> Tilley et al 2015

<sup>17</sup> Northover 2021

<sup>18</sup> Nazneen 2019

<sup>19</sup> King 2020

<sup>20</sup> Ibid.

<sup>21</sup> See for example Hudson and Leftwich (2014) on ‘disaggregating agency’ and how it impacts development change.

<sup>22</sup> See for example Evans 2004

<sup>23</sup> McDonnell, for instance, in her study of pockets of bureaucratic effectiveness within Ghana’s public sector finds that, contrary to the assertions of many capacity building efforts, bureaucratic performance and the cultivation of a bureaucratic ethos is directly tied to and dependent on “the tacit knowledge of doing bureaucracy” (McDonnell 2020).

<sup>24</sup> Andrews and Manning 2017

<sup>25</sup> There is increasing recognition within the literature that this type of non-technical knowledge is key to foster local leadership, an insight related to the political (rather than purely managerial) nature of leadership (ref. Roche & Denney 2019). Tacit knowledge invokes the practical experiences of managing the everyday politics of change: navigating the authorising environment and building change space (Andrews et al 2017); forming networks and shaping coalitions to bring various leadership functions together; and negotiating with potential allies and rivals (Roche & Denney 2019).

“empower local agents to learn from what has worked elsewhere”, not as a way to conform to best practice, but “as mental fodder to consider, allowing local agents more discretion to creatively borrow, repurpose, combine, or eschew what has worked elsewhere guided by their local habitus”. This thinking converges with experiences from the Coalitions for Change work undertaken by the Asia Foundation in the Philippines. Sidel and Faustino point out that drivers of local change typically do not want to be told what to do (expert-driven TA), neither are they ready to just apply what has been identified as ‘best practice’ elsewhere without national and local adaptation. Rather, they will seek out allies and peers elsewhere to get new ideas and innovate in their own context while maintaining some autonomy and ‘room for manoeuvring’ in the national context.<sup>26</sup>

### 3.3 Comparing, contrasting and contesting locally derived experiences

When localised, P2P learning can trigger innovation and problem-solving by helping local leaders diffuse knowledge, and compare and contrast experiences, priorities and solutions. WaterAid Cambodia’s **Civic Champions leadership development programme**, for example, set up a P2P learning mechanism for local leaders at district level to allow them to take stock and compare progress in addressing challenges of sanitation coverage. As a result, the progress in some districts incentivised leaders in neighbouring districts to act, by showing that prioritising better service delivery was not only possible but also preferable to the status quo of inadequate coverage<sup>27</sup>. Regular P2P stocktakes helped local leaders showcase progress, and to gain buy-in from the necessary constituencies<sup>28</sup>.

Similar effects were observed in the World Bank’s **Village Innovation Programme** in Indonesia. The Village Innovation Exchanges, a P2P learning platform at district and sub-district level, provided a forum for central and local governments to share village development priorities, which in turn stimulated innovation among village leaders and community members<sup>29</sup>. The World Bank found that the forums encouraged “healthy inter-village competition” by enabling villages to learn from one another and compare their performance<sup>30</sup>. Importantly, these village innovation forums, were found to be most effective when innovations were compared with others within their relative proximity. Local leaders were less likely to compare their performance with “national showcase villages”<sup>31</sup>.

P2P may serve to kindle and sustain the **motivation of local leaders** upon which effective leadership relies. As research by the Development Leadership Programme suggests, local leadership depends in part on motivated individuals who are able to act collectively to build political will and affect change<sup>32</sup>. We know that peer support *within* teams and organisational units matter for generating and sustaining intrinsic motivation among public sector workers, and that such motivation often constitutes an important factor in improving performance at the level of the individual and unit<sup>33</sup>. It has also been observed that the same mechanisms may apply to *peers that are not part of the same team* but face similar challenges or share a sense of general purpose<sup>34</sup>. An area for further exploration then would be to consider, first, how P2P support can be purposefully designed as a mechanism not only for knowledge transfer but also for triggering intrinsic motivation; and second, how this type of

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<sup>26</sup> Sidel & Faustino 2019

<sup>27</sup> WaterAid 2021

<sup>28</sup> Ibid.

<sup>29</sup> World Bank 2020

<sup>30</sup> Ibid.

<sup>31</sup> Ibid.

<sup>32</sup> DLP 2018

<sup>33</sup> McDonnell 2020; Tandler 1997

<sup>34</sup> Honig (2020) finds this is the case with district level government workers in Thailand. Preliminary (unpublished) findings presented at the EIP 2020 Annual Meeting. See also Honig & Gulrajani 2018.

peer support can be designed to facilitate the specific knowledge, inspiration and skills needed for local leadership to emerge.

#### 4. Using MEL to recognise and unlock endogenous capabilities

##### 4.1 Enabling local agency, motivation and leadership

Using P2P approaches and partnerships to unleash local capabilities poses a number of challenges for the monitoring, evaluation and learning practices adopted. While MEL is usually associated mostly with its accountability and transparency function, using MEL as part of the P2P learning process is equally important. This means that more **flexible MEL approaches and tools** are needed, which can capture both anticipated and unanticipated results. Without this, there is a risk that a too rigid results framework, or even an initially developed Theory of Change (if not regularly tested, updated and used as a basis for dialogue among peers), becomes a straitjacket that suppresses innovation and experimentation rather than the opposite. Following a very narrowly framed results framework may also miss the more meaningful institutional capabilities being developed and put to use as part of the P2P process.

Many of the tools traditionally used in results-based management (RBM) typically have their origins in efforts to manage and control processes, often using a transactional mind-set and focusing mostly on end results as a proxy for effective delivery. Over the last couple of decades, however, **exploratory and learning-oriented MEL approaches** have emerged and are increasingly used. These typically seek to capture and learn from both anticipated and unanticipated changes, paying attention also to positive deviants and outlier results which can be indicative of new and significant ways of working (e.g. by shifting embedded ways of 'thinking and doing' in an institution). These approaches<sup>35</sup> are often used by the problem-driven iterative adaptation (PDIA), Thinking and Working Politically (TWP) and adaptive management communities referred to above, and are equally pertinent when it comes to MEL for P2P learning.

The choice of approach and tool will always be dependent on the type of problem to be addressed among peers, the type of P2P partnership in question (see Lesson Harvesting report for an initial typology), and other contextual circumstances. However, by consistently introducing a focus on how capabilities are strengthened, institutionalized and used, national and sub-national reformers have a way to demonstrate local leadership about what works in their respective settings. Such capabilities can include **how problem-solving skills are activated** and triggered in relation to a bigger reform agenda (through concrete examples of their use), and the number and types of adaptations undertaken using local resources and knowledge. By default, this puts a greater emphasis on **how local knowledge is valued and used**, especially if tracked over time, and puts local leadership in charge of the change agenda and how it is being used in terms of strategies for tracking, analysing and communicating results for greater political buy-in.

##### 4.2 The role of intermediaries in facilitating and documenting learning and experimentation

Local knowledge – including knowledge of social and political norms or drivers – and what may be feasible from a political standpoint, can be triggered and better utilized using P2P learning and validation. EIP members' M&E documentation illustrates how P2P partnerships, when successful, can trigger unanticipated experimentation and spin-off effects by having peers share and validate lessons from similar contexts. Yet, these examples of local innovation are rarely systematically captured,

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<sup>35</sup> They include different approaches such as Strategy Testing (Asia Foundation), replacing LogFrames with SearchFrames in PDIA ([www.buildingstatecapacity.com](http://www.buildingstatecapacity.com)) and Outcome Mapping and Outcome Harvesting.

especially since many such innovations are not foreseen from the outset, but rather emerge underway in P2P initiatives.

**Neutral intermediaries** in charge of process facilitation, who have a deep understanding of the national context can help capture and synthesize these unanticipated results, using MEL approaches. Despite being a short-term initiative (6 months, small budget), the **Centre for Economic Governance (CEG)** in Kenya, for example, found that they could play a productive role as a neutral, local facilitator of P2P engagements between sub-national county officials, given that they knew the local context well when it came to local governance reform in Kenya. Their track record in the field of economic governance and the fact they were a non-state actor facilitating interactions between local governance officials further reinforced their credibility as an external actor.

Similarly, **LOGIN Asia** paid attention to local adaptation and intercultural peer understanding between peers as equals by facilitating a number of exchange visits between The Hunger Project (THP), India, and the Bhutan Network for Empowering Women (BNEW). The two organizations were carefully selected and matched by LOGIN to strengthen the newly established BNEW in Bhutan to promote women's political participation. A deep understanding and emotional connection came from the fact that they were similar organizations working on similar issues, with LOGIN Asia playing a **connecting and brokering role**. Although BNEW was identified as the 'recipient' of knowledge, and THP as the resource organization (with a tested methodology and working processes already in place), the relationship was learning oriented and not hierarchical in nature.

In both of these examples (CEG and LOGIN), change stories from participating institutions were regularly collected by the facilitating intermediary to gauge progress. LOGIN also developed a framework which sought to more explicitly **track the value added by the peer partnership** in relation to desired end results. More in-depth change stories were also recorded to track the more qualitative aspects of the partnership, including unanticipated effects and examples of local adaptation.

Whereas a central intermediary can help with synthesizing and validating emergent learning, as well as facilitating dialogue around it, getting the full picture nevertheless relies upon the active involvement of peer to peer partners in tracking and sharing progress with others on a regular basis. Building a structured process around how peer learning was used, or how it triggered new thinking and doing within their own institutions could involve developing tailored tracking tools for peer partners to use in their own working environments as a basis to start each meeting with an exchange about what each peer institution had done differently since the last time. This helped to build a repository of lessons and examples over time. **Government Partnerships International (GPI)**, UK, also provided tailored training for participating institutions on how to strengthen their existing organizational MEL practices as part of the P2P process. In other words, although GPI continued to play a **central role in gathering lessons** and comparing the participating partners' self-assessment scores as a basis for continued dialogue around progress, each organization also actively contributed to the overall information gathering for their joint MEL framework, and thus strengthened their own MEL practices as part of the process.

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