METHOD & CAPACITY
DEVELOPMENT STRATEGY
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Cover photo: Augustine Karani
Text: Jenny Sonesson

FORUMSYD
THANK YOU!

Forum Syd would like to thank all those who took the time to participate in the workshops, discussions and interviews involved in the development of Forum Syd’s Method and Capacity Development Strategy. Without their support and input, the formulation of the strategy would not have been possible.

The Method and Capacity Development Strategy is the result of a participatory effort, from its conception to its final draft. Fifty civil society organisations in different countries participated in discussions to define its aim and content, and provided input on how Forum Syd could work in more relevant and effective ways with capacity development and method. Representatives of international development co-operation agencies and donors in countries where Forum Syd has offices were consulted and interviewed to identify trends in civil society co-operation. Forum Syd staff from its different offices participated in workshops and discussions, contributing their knowledge and experience to a global approach for developing capacities within civil society.

The strategy has been developed by a global team led by Jenny Sonesson, representing the Impact and Quality Assurance Unit, comprised of: Mukami Kowino and Amos Langat representing Hub Eastern and Southern Africa; Astrid Cañas and Carlos Cardenas representing Hub Latin America and the Caribbean; Karyna Bobryk and Volha Paddubnaya representing Hub Eastern Europe; Khady Björkdahl and Lotta Granberg representing Hub Multiregional; and Tep Chanbora representing Country Office Cambodia.
Forum Syd’s Global Method and Capacity Development Strategy (2018 – 2022) serves different purposes. It is a resource for members and partners to get an insight in to how the organisation approaches method and capacity development. It is also an internal guiding document for Forum Syd staff to support them in their work towards global knowledge management and organisational learning related to method and capacity development.

Throughout its history capacity development has been a priority in all Forum Syd programmes. The new strategy seeks to learn from past experience and facilitate a systematic and cohesive approach to method and capacity development. It is also intended to remain true to Forum Syd’s platform role by facilitating closer collaborations and mutual learning with its members.

The strategy is divided into three chapters:

- The first chapter, Framing Method and Capacity Development, describes the objectives of the strategy and the definition of method and capacity development used by Forum Syd.
- The second chapter, Change Process – Background to the Strategy, explains the contribution of the strategy to Forum Syd’s overall vision and purpose, its decentralisation process and its role in capacity development.
- The third chapter, Working Towards Change, explains how the strategy will be implemented.

In the coming years, Forum Syd aims to become a significantly more effective partner in global transformation through well-targeted, “good fit” capacity development initiatives. Realising the potential of this strategy will take time. It is in itself a transformational process that builds on the solid experience and assets of the organisation and its members, and embraces important changes in the way it works.

The strategy laid out in this document emphasises that this transformation requires the involvement of the entire organisation at all levels and across all offices. Careful sequencing and targeting intermediate results will be as important as maintaining sight of the overall vision. Many of the pathways articulated in this strategy may be turned into “quick wins” to gain and maintain momentum. These include selected strategic initiatives that combine multiple efforts in-house and with members and partners. Some creativity will be needed to bring everybody together with a sense of common purpose and positive energy.

Capacity development is critical for a just and sustainable world where all people have the power to effect change. It should apply relevant knowledge and approaches to evolving challenges, and include a spirit of continued learning.
1. FRAMING METHOD AND CAPACITY DEVELOPMENT

1.1 HOW FORUM SYD WILL WORK WITH METHOD AND CAPACITY DEVELOPMENT

A global method and capacity development strategy will improve Forum Syd capability to offer relevant and effective initiatives that will contribute to civil society’s ability to support democracy and respect of human rights around the world. To achieve this, one global objective and three outcomes have been defined.

The strategy seeks to strengthen Forum Syd’s role as a knowledge platform. It underscores the importance of mutual learning with and between its members, Swedish civil society organisations, local civil society organisations, and other partners. Thus its Global Objective: “Forum Syd is a knowledge platform for members, partners, donors and other stakeholders. It seeks to strengthen civil society through mutual learning.” To achieve this objective, Forum Syd need to engage in strategic capacity development, continuously improve the quality of its capacity development initiatives and activities, respond to the needs of its members and partners, and always be guided by a rights-based approach.

The internal outcomes of the strategy seek to establish the structure, approaches, and tools required to produce relevant capacity development initiatives, and to be a learning organisation:

**Global Objective**
Forum Syd is a knowledge platform for members, partners, donors and other stakeholders. It seeks to strengthen civil society through mutual learning.

**Internal outcomes:**
- A global Capacity Development Toolbox is in place, to ensure a common understanding of method and capacity development within Forum Syd.
- Organisational learning and ownership within Forum Syd is conducted strategically.

**External outcome:**
- The Learning Management Cycle is used to systematically engage with stakeholders in method and capacity development initiatives at contextual, organisational and individual levels.

The internal outcomes of the strategy seek to establish the structure, approaches, and tools required to produce relevant capacity development initiatives, and to be a learning organisation:

The first internal outcome, a global Capacity Development Toolbox, is in place. This is designed to ensure a common understanding of method and capacity development within Forum Syd. The tool box is a structured collection of methodologies documentation and andragogic support materials to assess needs, set learning goals, provide content, and deliver and evaluate the capacity of development activities. The production of learning initiatives within Forum Syd’s different offices will be compiled, systematised and made available to all staff and interested members and other civil society organisations. It will be useful to apply the learning management cycle (see chapter 3) when designing and implementing capacity development initiatives, and will lead to a more structured and process-oriented approach to mutual learning with members and other stakeholders internally.

The second internal outcome, Organisational learning and ownership within Forum Syd is conducted strategically, refers to having an organisational plan in place that not only guarantees continuous capacity development for staff, but also provides guidance on how Forum Syd work with capacity development within its own programmes, and in planning, monitoring and evaluation (PME). Enhancing capacity development within the organisation demands an investment in organisational learning and ownership facilitation. An enabling environment, which among other factors requires time, energy, will and resources, is needed for organisational learning to take place.

The external outcome aims to systematically design, implement, improve and innovate capacity development processes for, and together with, diverse stakeholders. As a capacity developer, Forum Syd consider external engagement with diverse stakeholders a top priority. Forum Syd will continue to engage in learning initiatives with members and partners. Forum Syd will strengthen its role as a civil society platform by promoting existing methodologies, method material, experiences and capacities of members, and by facilitating exchange and synergies between different development actors. Methodologies and method material that have been developed within different programmes will be made accessible to members, Swedish civil society organisations, local civil society organisations and other stakeholders. Thus the internal outcome of the strategy is: “The Learning Management Cycle is used to engage systematically with stakeholders in method and capacity development initiatives at contextual, organisational and individual levels.”

Forum Syd believes that by working together with members and partner organisations we can contribute greatly to capacity development and learn from each other.
1.2 WHAT IS METHOD AND CAPACITY DEVELOPMENT

Capacity development of civil society organisations has been and continues to be focused on short-term goals, and on building the technical skills needed to implement projects. More specifically, work has centred on how to manage funds, provide accountability, and manage risks. While there is still a need for technical capacity development, there is also a consensus that more attention and time should be devoted to other organisational and institutional capacities, such as the capacity to forge alliances, advocate rights, contribute to decision and policy making, and influence others to bring about change. It is important for development partners to understand that capacity cannot be imported as a turnkey project. Instead, capacity development must be based on the needs and existing capacities of recipients—who are the bearers of change. This increases the ability of civil society to drive and manage change towards strengthened democracy and respect of human rights.

It is crucial to remember that capacity development processes are often neither linear nor predictable. Capacity needs are influenced by various contextual conditions that change continuously. Forum Syd views method and capacity development as a holistic process in which the strengthening of individual and organisational capacities influences one another and the contexts through which actors navigate.

Forum Syd defines method and capacity development as the process through which the organisation, together with diverse stakeholders, strengthens mutual learning, and the sharing of experiences and knowledge.

Method and capacity development is anchored within Forum Syd’s theory of change and results framework. Forum Syd’s theory of change focuses on change at the following levels:

- **Rights-holders** – individuals who can develop their competences, skills and attitudes;
- **Civil society organisations**, networks and partnership that may increase their technical and strategical competences and their legitimacy;
- **Duty-bearers** – institutions and other stakeholders that determine the contextual conditions such as laws, policies, investment.

Supporting efforts of individuals to organise and work together to claim their rights is at the core of Forum Syd’s work, and requires efforts at the levels (individual, organisational, contextual) to produce lasting change.

Depending on the level, (individual, organisational or contextual), capacity and capacity development initiatives are performed, they may take different forms. For instance through human capabilities, relational capabilities and/or resource capabilities.

- **Individual level**: Capacities developed at the individual level may lead to changes in skills, behaviours and attitudes. This level is interlinked with the other levels as it is important to develop and see individuals’ capacity to achieve change on organisational and contextual levels.

- **Organisational level**: Strengthening organisational capacities consists of measures to improve the overall functioning and performance of an organisation. It is often focused on changes in organisational mandates, systems, processes and/or priorities. It also includes organisations’ thematic knowledge, negotiation and conflict management. An organisation improves over time as it gains experience and develops systems to recognise existing competencies and improves organisational learning.

- **Contextual level**: All societies are subject to a set of conditions that affect the extent to which civil society organisations lead initiatives, e.g.: legislation, norms, policies and economic resources. On the contextual level, power relations can be understood as the enabling environment in which a person may (or may not) use their capacities. Understanding the context in which one works and the change that is to be achieved is crucial.

The strategies and actions required bringing about change towards a just and sustainable world are context-dependant and time-constrained. The extensive experience of Forum Syd’s member organisations and staff at different offices is of added value in supporting each other and other civil society organisations seeking changes in attitudes, behaviours, norms, policies and power relations.

Forum Syd is striving to become a learning organisation: to draw learnings from its experience, and aggregate knowledge is crucial for further development and improvement.
2. CHANGE PROCESS – BACKGROUND TO THE STRATEGY

2.1 FORUM SYD’S OVERALL GOALS AND ITS DECENTRALISATION PROCESS

The method and capacity development strategy contributes to both Forum Syd’s vision and purpose:

- Strong through our diversity: Forum Syd is recognised by members and other stakeholders as an important platform for civil society. We do this by making the work of the many diverse organisations with which we work more visible, irrespective of thematic or geographical boundaries. We are an influential voice in development co-operation, and champion the role of civil society in promoting democracy and fulfilling human rights.

- Continuous improvement: our processes are clearly defined, efficient and fully implemented. Leadership is well defined, and all decisions are guided by our purpose. We have improved results and increased potential for synergies by innovating and co-ordinating between organisational units, with our members, and through strategic partnerships.

The organisation has gone through an intensive restructuring and internal change process, which has given rise to a new organisational structure. Forum Syd has operated according to the new structure since January 1st, 2017.

Among other factors, the structure is based on the concept of “going glocal”. Going glocal implies decentralisation of tasks and resources to be closer to where change takes place, and offering contextual knowledge and support. This new approach emphasises local ownership and locally-led change processes that are the core of sustainable capacity development initiatives. The method and capacity development strategy contributes to this change and builds on the lessons learned from the past. It aims to use the organisational-knowledge of different offices strategically to increase organisational capacity.

This strategy is based on the lessons learned from all Forum Syd offices and provides guidance on how the organisation can move forward as a learning organisation.

2.2 FORUM SYD’S ROLE AS CAPACITY DEVELOPER

One of Forum Syd’s four roles is to be a capacity developer. This role has been an important focus in collaboration with member organisations, Swedish civil society organisations, local civil society organisations and other partners. To become a platform for experience sharing and learning, Forum Syd engages in long-term capacity development of civil society.

**FORUM SYD’S FOUR ROLES:**

- **Advocator.** We advocate for change that contributes to a just and sustainable world.
- **Capacity Developer.** We strengthen development actors in Sweden and abroad.
- **Development Actor.** We run development programmes in partnership with organisations in partner countries.
- **Grant Administrator.** We distribute and quality assure grants to Swedish organisations working with international development co-operation, and with Swedish information campaigns on global issues.

Capacity development is a critical and crucial aspect of development work, and is reflected throughout the Paris/ Accra Aid Effectiveness Agenda. In line with this, Forum Syd aims to work as a unified organisation - increasing co-operation, communication, co-ordination, as well as cross-departmental work between (and within) regional hubs, country offices and units.
This strategy addresses both method and capacity development because the two concepts are interlinked. Method development includes the methodologies used for implementing relevant and effective capacity development initiatives as well as the methodologies used to mainstream development perspectives into Forum Syd’s work. To harmonise a bottom-up and rights-based perspective, method and capacity development will be guided by the same strategy. In an increasingly complex development sector, Forum Syd must adapt to become a more strategic and effective capacity development actor and enhance the impact and sustainability of its work. This approach will:

- Increase coherence and effectiveness of learning initiatives across Forum Syd’s operations
- Strengthen impact and visibility, and act as a strategic re-branding of Forum Syd’s role as a capacity developer
- Strengthen Forum Syd’s credibility in the international community and in relation to organisational goals
- Develop a bottom-up approach which will give members and partners a more pro-active position
3. WORKING TOWARDS CHANGE

The strategy will be operationalised through two interlinked processes: i) Capacity Development and ii) Method Development.

- The Capacity Development process comprises the building and permanent enrichment of Forum Syd’s Capacity Development toolbox, face-to-face, online and blended capacity development activities in Forum Syd’s different programmes and projects and internal organisational learning and training.
- The Method Development process comprises the operationalisation of Forum Syd’s development perspectives, the institutionalisation of the Right(s) Way Forward (RWF) methodology and the review and adjustment of Forum Syd’s theory of change and results model.

The strategy is a statement of the direction Forum Syd is taking to put its theory of change and results model into practice. Both of the above mentioned processes will have an emphasis on collaborative arrangements within Forum Syd and with its members and partners and a bottom up approach; priorities will be set each year and joint workplans will be developed by the Global Method and Capacity Development Team.

Capacity Development and Method Development activities require resources. Thus tools to embed capacity development in programme development and fundraising will be crucial. The strategy also provides a five-step model, the Learning Management Cycle (LMC), that will be used to frame the way Capacity Development will be implemented: i) needs and context assessment, ii) learning goals, iii) content selection, iv) delivery, and v) evaluation. The LMC will be integrated to the Planning, Monitoring and Evaluation (PME) of Forum Syd’s programmes and projects.

3.1 THE LEARNING MANGEMENT CYCLE (LMC)

The Learning Management Cycle (LMC) is a model created to guide Forum Syd through sustainable learning initiatives with long-term results and thinking that contributes to organisational learning. Members and partners are offered capacity development through seminars, experience exchange, face-to-face courses, eLearning, workshops, training and coaching. Having these diverse approaches to capacity development requires the adaption of content and format to given target groups and contexts.

The LMC consists of five steps. It is intended to standardise the planning of learning initiatives in Forum Syd’s different programmes and projects, highlighting core aspects of the process that need to be considered regardless of scope, time frame or budget. It will also form the basis of the Capacity Development Toolbox, as the tools that are designed all around the organisation will be systematised according to the five steps of the LMC.

Needs and Context Assessment | Analysis of needs and conditions of participants and context. Establish intention of learning experience to be designed and delivered. Why are we offering this learning experience? What needs does it cover or respond to?

Learning Goals | Specific skills and knowledge expected to be acquired/developed through the learning experience, established by goals. Takes into account specific competences of participants and trainers.

Content Selection | Resources and methodologies used to implement learning experience. Selection of suitable material to fulfil needs identified to achieve learning goals.

Delivery | Implementation of learning experience based on designed material. Emphasis on importance of strong interactive component within learning activities.

Evaluation | Measure learning achievements and impacts changes in skills and/or behaviours obtain feedback for improvement of future learning experiences.
3.2 PLANNING, MONITORING AND EVALUATION

Existing planning, monitoring and evaluation systems of the organisations and their programmes and projects will be used to monitor results and best practices in terms of capacity development. Forum Syd’s theory of change and results model integrates capacity development on its three levels (individuals/rights-holders, organisations, context/structure/duty bearers), needed to design or assess any intervention implemented or assessed/supported by the organisation.

Capacity development is often thought of as a learning process for individuals, and as a change and transformation process for enabling environments and organisations in a country or region. Hence, change and learning should be used as guiding principles to define goals, objectives and indicators for any Forum Syd intervention. Capacity development cannot be monitored without a deeper understanding of the contextual factors and relationships that influence, sustain, enable or disable the use of individual competencies and organisational capabilities. Tracking capacity change is challenging because it implies looking at factors which are often intangible and complex to measure, such as the application of new knowledge, the performance of organisations, and how conducive the enabling environment is within a specific sector. These challenges are further compounded by the contexts of many development projects which often change course during implementation.

The value of monitoring goes beyond recording activities or complete reports. If processes and information are well managed, then this crucial part of the project cycle allows the development of a culture of continuous improvement. The process of learning never stops, and it is important to foster learning at an organisational level. Having systems and capacity globally, which support monitoring, evaluation, accountability and learning, is vital for Forum Syd to achieve its capacity development objectives.

3.3 OPERATIONAL PRIORITIES

This section emphasises priority actions that will be instrumental to the operationalisation of the strategy. Priorities have been set both for the Capacity Development Process and the Method Development Process.

3.3.1 CAPACITY DEVELOPMENT

The main priority will be to achieve an integrated and coherent approach within the organisation in terms of capacity development. All offices and units should, from the outset, develop an understanding of what this implies for respective programmes.

The global approach ensures suitable adoption of technologies to the learning environment and responds to the specific needs and expectations of a diverse learner profile with a specific content, pedagogy and technical infrastructure. The global method and capacity development team will be working with the strategic approach to capacity development, and is quality-ensuring the global initiatives to learning.

One way Forum Syd is working towards change is within eLearning. In an increasingly digital world, learning, like many other sectors, is adopting digital technologies. Forum Syd is striving to introduce and build awareness of the role of technology in learning across a range of its capacity development activities. Forum Syd identified and adopted eLearning as a way of conducting development initiatives in 2013. However, since then, much has changed with rapid technological advancements constantly offering new opportunities within education. We have witnessed the social context of learning influenced by digital media and the flexibility of electronic devices influencing learning expectations and exchange modes. Forum Syd looks to such technologies for great efficiency and continuous enhancement of its capacity development initiatives. Forum Syd will continue to work with its learning initiatives.

Forum Syd is now moving into a new phase of eLearning, working with context and needs-assessment to ensure sustainability; and to position Forum Syd to take advantage of rapid developments in the digital space. This will enhance the learning environment, and support learning diversity across the organisation.

The global approach ensures suitable adoption of technologies to the learning environment and responds to the specific needs and expectations of a diverse learner profile with a specific content, pedagogy and technical infrastructure. A global method and capacity development team is working on a strategic approach for capacity development, and is quality-ensuring global initiatives to learning. eLearning will continue to play a key role in Forum Syd’s capacity development initiatives.

3.3.2 METHOD DEVELOPMENT

Method Development is crucial to the ownership and operationalisation of Forum Syd’s theory of change and results model. The main priority will be to achieve common definitions and understanding of the theory of change, the results model, and development perspectives. This will create the conditions necessary to operationalise development perspectives in all Forum Syd’s roles, and institutionalise the RWF methodology.
In the coming years, Forum Syd aims to become a significantly more effective partner in global transformation through well-targeted, “good fit” capacity development initiatives. Realising the potential of this strategy will take time. It is in itself a transformational process that builds on the solid experience and assets of the organisation, and embraces important changes in the way it works. The strategies laid out in this document emphasise that this transformation requires the involvement of the entire organisation at all levels and across all hubs and offices. Careful sequencing and targeting intermediate results is as important, as well as not losing sight of the vision. Many of the pathways articulated in this strategy may be turned into “quick wins” to gain and maintain momentum. These include selected strategic initiatives that combine multiple efforts in-house and with partners. Some creativity will be needed to bring everybody together with a sense of common purpose and positive energy.

CONCLUSION

Capacity development is critical for a just and sustainable world where all people have the power to effect change. It should apply relevant knowledge and approaches to evolving challenges, and include a spirit of continued learning.