Learning Framework

An example of a Learning Framework that can be adapted to fit the specific needs and situation of an organisation.

Sample outline Learning Framework

Contents

1. Introduction

This document outlines a Learning Framework - an overview of the systems, structures, capacities and resources required for strengthening organisational learning and knowledge management – for ****.

The Learning Framework aims to build on existing good practices in learning and sharing in **** but also to address any shortcomings. By following the principle of integrating learning into our existing systems and structures as far as possible rather than creating parallel systems and structures, **** aims to ensure that learning is embedded in the 'way we do business'. In this way learning and sharing are more likely to be sustainable processes – part of ****'s organisational DNA.

This Learning Framework is based on three main strategies:

- A proactive Learning Agenda of Learning Questions that enables us to focus and structure our learning, knowledge creation and sharing and make it easier to document.
- Building learning into our monitoring and evaluation systems so that learning that emerges from the implementation of our projects and programs is more easily identified, analysed, documented, acted upon through adaptive management and communicated.
- Developing our organisational culture so that it enables and encourages learning and reflective/critical thinking across all levels of the organisation.

Knowledge is usually very context specific, so what is learned in one setting may need to be adapted quite significantly in order to be used in another setting. Sometimes what we learn from our work may be so context specific that it does not 'travel' at all – and may appear to be a 'failure'. Much can be learned from such apparent 'failures' or unexpected outcomes, and if this learning is shared with others it can help them to avoid the wasteful use of resources. However, some knowledge is more generic and can be applied in many settings, particularly if the underlying principles or success factors can be identified.

The purpose of this Learning Framework is to provide guidance to **** staff about how best to integrate learning and sharing into their work in a more systematic way, thereby strengthening their contribution to ****'s performance and effectiveness and extending and deepening the contribution that the organisation makes.

2. Background

Organizational learning involves systems and procedures that enable an organization to proactively test and monitor its approaches and capture, share and act upon its experiences. It is to a large extent determined by how well staff practice critical and analytical thinking; and, how well the organizational culture supports learning. Learning is a continuous process which will help to build on past successes and not to repeat previous failures.

3. Rationale for Learning and sharing

Organisational learning and sharing are, therefore, essential activities for **** for the following reasons:

Good practices identified and widely adopted When we learn from experience (internal and external) and use this to influence the design of future projects and programs, they are likely to be more effective and therefore successful.

Increased organisational capacity When we learn from our past experiences we become stronger as an organisation and better able to deliver our services to target communities and meet our organisational goals more effectively.

Smarter programming When we build on our previous experience, we reduce our transaction costs and increase the efficiency of our work.

Theories of Change tested and updated We apply what we learn from our experience to test the assumptions and hypotheses that underpin our projects and programs and use this to update our Theories of Change in response to changing circumstances and context.

Adaptive management We view our projects and programs as 'live' experiments that can be modified by responding to our emerging understanding of what does and does not work and by responding to changes in the increasingly uncertain and dynamic external context of our work

Contribution to global knowledge By capturing and sharing what we learn in a carefully targeted way we are making a contribution to global knowledge.

Individual development By contributing to organisational knowledge development and learning, our staff become more confident and professional thereby contributing to their career development.

4. Principles and Values

The following principles and values underpin this Learning Framework:

1. Learning and sharing are viewed as *strategic priorities*, essential to the success of all our work.
2. Learning is *everyone's responsibility*. We all have a role to play in building **** as an organisation that learns systematically from its experience.
3. We take a *proactive approach* to learning guided by our Learning Agenda (whilst also creating opportunities to capture learning retrospectively from current projects and programs).
4. We take an *appreciative* approach, building on our existing strengths in learning and sharing.
5. We aim to create an environment of trust that encourages curiosity, openness, learning and sharing. We demonstrate this by our willingness to discuss and learn from unplanned outcomes without repercussions.
6. We aim to proactively cultivate and value the learning that emerges from working with communities and other partners.
7. We integrate learning into our existing systems and structures as far as possible rather than creating parallel systems and structures so that learning is embedded in the 'way we do business'.

5. Staff participation

Description of how staff participated in the development of the Learning Framework.

The following Table summarises what was learned during this process.

Enablers of Organisational Learning	Constraints / Limitations to Organisational Learning

6. Challenges for Learning and Sharing

In order to strengthen our approach to learning and sharing in **** we recognise that there are a number of challenges we need to address (the following are examples):

A. Ensuring that learning and sharing is accepted as everyone's responsibility
B. Promoting a proactive approach to learning
C. Taking a more systematic approach to learning and knowledge management
D. Integrating learning and sharing into all stages of the Project/Program management cycle
E. Creating and sustaining a trusting learning culture that encourages reflection on unplanned outcomes as well as successes
F. Integrating learning and sharing as much as possible into existing organisational systems
G. Documenting learning in general and decision-making processes in particular
H. Prioritising the time for reflection, knowledge creation and sharing.
I. Making the deep knowledge in the minds of our very experienced senior staff more accessible to colleagues.
J. Ensuring that the learning that emerges from the field is given sufficient emphasis.
K. Strengthening and protecting institutional memory in an organisation with fairly high staff turnover at middle levels.
L. Being clear about the purpose of the Knowledge and Learning Centre
M. Developing staff members' critical thinking and reflective practice and writing skills.

We have aimed to address these challenges with practical strategies in the Learning Framework.

7. Integration of the Learning Framework with Other Initiatives

Description of how the approach to learning and sharing described in this Learning Framework takes into account the need for integration with other organisational initiatives, eg:

- Organisational Standards
- Funding Requirements

8. Learning Agenda

**** is committed to learning and sharing as a strategic priority to enable our organisation to achieve our organisational goals effectively and efficiently and share our knowledge widely. We have translated this commitment into the creation of an explicit Learning Agenda – a set of key Learning Questions that define and focus our priorities for learning, knowledge creation, knowledge sharing and the use of knowledge as an organisation.

Our Learning Agenda comprises a set of carefully defined Learning Questions at project/program, thematic area and strategic/organisational level. The Learning Questions explain what we aim to learn from our work. Learning Questions will be built in to the design of new projects or programs, and for current work we will develop relevant Learning Questions.

By carefully wording our Learning Questions we can use them to examine links between the major themes of our work.

In our view a good Learning Question has the following characteristics:

- It is relevant to the real work of the people who will be exploring the question.
- It should be developed in consultation with those who will be involved in answering the question.
- It is a question that is currently unanswered in the given context.
- It is likely to stimulate fresh or innovative thinking / approaches. It is not so complex that it is open to widely different interpretations.
- It states very clearly what you want to learn.
- It gives direction and a sense of outcome.
- It encourages new and different questions to be asked as the initial question is explored.
- It is likely to generate hope, imagination, engagement, creative action, and new possibilities.

During the course of the implementation of our projects and programs we will monitor and review progress in answering the Learning Questions. We may also develop new questions or adapt existing questions to take into account changing circumstances and the learning that emerges from the process of answering earlier Learning Questions.

9. Learning Culture

Although our main focus is on *planned* learning using our Learning Agenda, we recognise the importance of encouraging staff to be open to learn from their day-to-day work experience (*emergent* learning). Both approaches to learning require a supportive learning culture.

**** aims to create and sustain a learning culture that enables, encourages, and values learning at all levels in the organisation. The principles and values of our Learning Framework (see Section 4) help to shape our learning culture. We wish to have an organisational culture that encourages curiosity, questioning, critical reflection and sensible risk-taking among all our staff in the pursuit of greater organisational effectiveness.

We have identified the main constraints and limitations to learning that we face and, through this Learning Framework, we have developed strategies for overcoming those constraints.

10. Leadership and Learning

****'s leadership plays a central role in creating the culture of trust and culture to enable learning and sharing. All staff with a management responsibility are expected to lead by example by demonstrating that they reflect on their own work and actively participate in learning processes. They are also expected to contribute to creating the motive, means and opportunity for learning. To create the *motive* for learning, the leadership explains why learning is important (see Section 3) and how each staff member can contribute to our learning agenda (see Section 17). To provide the *means* for learning, the leadership ensures that staff know how to use our Learning and Sharing Toolkit, and have the necessary competences for learning and sharing (see section 16.2). Finally, the leadership provides the *opportunity* for learning by putting in place the necessary systems, structures and resources, and ensuring that staff prioritise the time for learning. This Learning Framework addresses the motive, means and opportunity for learning.

11. Learning in the Project/Program Management Cycle

The key to maximising learning in **** is to integrate it with the project/program management cycle. Although each of our donors has its own format for project design,

planning, implementation, monitoring, adaptive management and evaluation, the following five steps are common to all. The Learning Framework has implications for all five steps in the project/program management cycle.

11.1 Project/Program Inception

This step involves creating the initial team, scoping, agreeing targets, and developing an understanding of context and stakeholders. In order to integrate learning into this step we will:

11.1.A.	Be clear about what the initial project design team members can contribute in terms of skills, experience and knowledge.
11.1.B.	Identify any knowledge gaps in our design team and, if necessary, find sources of expertise to fill those gaps.
11.1.C.	Make clear the experience and knowledge that we can contribute to the project.
11.1.D.	Identify broad learning goals (that will become more specific Learning Questions) for the project.

11.2 Project/Program Design

This step involves designing the specific interventions that will be undertaken. In other words, the specific action plan, monitoring plan and operational plan. This involves articulating our theory of change (in the form of a results chain, logframe, and/or narrative). In order to integrate a learning approach into this step we will:

11.2.A.	Carefully review and incorporate relevant lessons from past and current experience into the project/program design by referring to documented lessons from project and program reviews.
11.2.B.	Through critical reflection identify and record the assumptions underpinning our Theory of Change
11.2.C.	Invite a range of expert internal and external stakeholders to comment on the design.
11.2.D.	Identify potential partners based on an understanding of the expertise they can bring to the project/program.
11.2.E.	Agree Learning Questions with communities and partners and build these into the project/program design.
11.2.F.	Ensure the M&E plan is designed to assess progress on answering Learning Questions and also gathers evidence to demonstrate how learning has been used to strengthen organisational (and partner) capacity, improve targeting and effectiveness, and how it has been shared with and used by others in the sector.
11.2.G.	Ensure that the 'signing off' process whereby the project designers hand over responsibility to the project implementers is carried out in a thorough way that includes an explanation of the underlying Theory of Change and the Learning Questions.

11.3 Project/Program Implementation

This is a critical step in the project management cycle. It involves developing and implementing specific workplans and ensuring sufficient resources, capacity and partners. To integrate a learning approach into this step we will:

11.3.A.	Ensure that workplans and budgets are realistic in the light of previous experience.
11.3.B.	Ensure that the project has (or can develop) the necessary capacity to achieve its goals (based on our previous experience).

11.3.C.   Build strategies and mechanisms for answering Learning Questions in workplans.

11.3.D.   Document progress made in answering Learning Questions including budget for the development of communication materials.

11.4 Project/Program Analysis/Adaptation

This step involves managing the monitoring data and regularly analysing it to create useful information that will guide decision-making. In order to take a learning approach to this we will:

11.4.A.   Re-assess, when necessary, the assumptions (Theory of Change) that underpin the project design at the mid-term review.

11.4.B.   Incorporate Learning Questions in our monitoring system and gather data that will help to answer the Learning Questions.

11.4.C.   Document any other learning points arising during project implementation.

11.4.D.   Regularly assess the progress made in answering Learning Questions and identify what the answers are telling us. Re-assess the Learning Questions and, if necessary, make changes to them.

11.4.E.   Ensure that managers are familiar with the concepts of adaptive management (double loop learning) and can apply what the project is learning to make necessary changes.

11.4.F.   Document discussions and decisions and the reasons why decisions were taken.

11.4.G.   Share the lessons that are identified, with colleagues carrying out similar work.

11.5 Project/Program Sharing

This step involves sharing lessons and products such as reports and other publications with key internal and external audiences. Projects and programs may also be the subject of a final evaluation and/or audit. To apply a learning approach to this step we will:

11.5.A.   Document the answers to our Learning Questions in Technical Reports and illustrate these with stories and examples that illustrate both successes and unplanned outcomes.

11.5.B.   Include discussion of Learning Questions and other lessons learned on the agendas for Project Executive Meetings and Project Steering Committee Meetings.

11.5.C.   Use a range of mechanisms for internal and external sharing of answers to Learning Questions and other learning (from successes and unplanned outcomes) – and follow up to see how this learning has been used.

11.5.D.   Ensure that evaluation ToR include evaluation questions related to: assessing learning and knowledge creation in the project, developing and answering the Learning Questions; how learning from the project contributed to capacity development; and how learning from the project has been shared more widely and used.

12. Levels of Learning

We encourage and support learning at five inter-related levels: individual, project, thematic area, organisational and inter-organisational levels.

12.1 Individual Level Learning

We recognise that individual learning is essential to the achievement of our Learning Agenda. Without learning at an individual level there will be no organisational learning For this we require all our staff to be reflective practitioners and critical thinkers who are confident and committed to sharing their knowledge with colleagues.

To do this we will:

12.1.A.	Require all staff to fulfil their responsibilities for learning and sharing
12.1.B.	Employ staff who demonstrate a willingness to learn and share their knowledge with others.
12.1.C.	Create an organisational culture that encourages learning from unplanned outcomes and celebrates successes.
12.1.D.	Provide all staff with a thorough orientation to our Learning Framework and the role they are expected to play.
12.1.E.	Ensure that staff are able to distinguish between learning that leads to generic knowledge and learning that leads to knowledge that is specific to context.
12.1.F.	Specify which Learning Questions each individual member of staff is expected to contribute to.
12.1.G.	Familiarise all staff with the Document Management System and expect them to make use of the system by uploading and downloading documents.
12.1.H.	Provide opportunities for staff to develop their writing skills.
12.1.I.	Require new staff to attend training on reflective practice in their first year.
12.1.J.	Build learning goals (e.g. contributing to answering Learning Questions) into all individual workplans and the performance evaluation system.
12.1.K.	Encourage staff to include one goal related to their professional development in their annual workplan
12.1.L.	Require staff to prepare at least one documented story highlighting their learning for discussion at each six-monthly performance evaluation meeting
12.1.M.	Provide opportunities for relevant exposure visits
12.1.N.	Provide opportunities to attend relevant seminars, workshops and conferences as contributors and participants
12.1.O.	Debrief all staff who leave **** and act on what they tell us about our organisation

12.2 Project Level Learning

Projects are the building-blocks of our work. Our most important learning comes from the implementation of our projects. Key to our learning at project level is our commitment to listen and learn from the communities and other partners with which we work.

To maximise learning at project level we will:

12.2.A.	Include Learning Questions at the inception and design stage of all of our projects, involving potential partners whenever possible.
12.2.B.	Devise Learning Questions for existing projects with the participation of communities and other partners.
12.2.C.	Hold a starting workshop for each project/program in which Learning Questions are documented and strategies for answering the Learning Questions are shared.
12.2.D.	Create regular opportunities to discuss, review progress and learn from the communities with which we work and our other partners
12.2.E.	Ensure that progress on answering the project's Learning Questions is recorded, discussed and assessed at project review meetings.

12.2.F.   Provide opportunities for peer learning between projects through exposure visits and other methods.

12.2.G.   Record what we and our partners are learning using video, photographs and audio.

12.2.H.   Share knowledge generated from the field through field visits, retreats, review meetings, our M&E system, publications, and retrospective Learning Histories.

12.2.I.   Ensure that we document and learn from successes and also document work that does not go according to plan and explain why.

12.2.J.   Hold an 'end-of-project' workshop for each project/program at which lessons learned (including answers to Learning Questions) are documented and shared.

12.3 Thematic Working Area Level Learning

Our thematic working areas comprise the following themes: ****. To learn from each of these themes we will:

12.3.A.   Include in our Learning Agenda, Learning Questions related to each of the thematic areas

12.3.B.   Ensure that progress on answering the Learning Questions is recorded, discussed and assessed.

12.3.C.   Use Learning Histories, where appropriate, to capture and document the evolution of our work and the wider and long-term lessons learned

12.3.D.   Share what we learn with our partners, stakeholders, networks and others with an interest in our thematic working areas.

12.3.E.   Use what we learn from our thematic areas to influence policy design and innovation.

12.4 Strategic / Organizational Level Learning

We recognise the strategic importance of learning and the role that learning should play in developing our organisation's strategic direction, priorities and alliances, and in managing organisational growth.

To make learning at the strategic/organizational level a priority we will:

12.4.A.   Devise Learning Questions linked to our strategic objectives.

12.4.B.   Use Learning Histories, where appropriate, to capture and document the evolution of our work and the wider and longer-term lessons learned

12.4.C.   Ensure that what we learn from these strategic-level Learning Questions influences our thinking about our organisation's strategic direction, priorities and alliances.

12.5 Inter-organizational Level Learning

Because most of our work is carried out in partnership, inter-organizational learning extends from project level activity to global level influence and sharing. We aim to learn from, and share our learning with, our Government partners, NGO partners (national and international) and the private sector. To do this we will:

12.5.A.   Share our learning openly with our partners

12.5.B.   Conduct joint reviews with our implementing partners

12.5.C.   Organise cross-boundary level co-operation and review/planning meetings

12.5.D.   Develop joint projects and programs

12.5.E.   Contribute to policy innovation with Government

12.5.F.   Participate in network meetings, reviews and workshops

12.5.G.   Contribute to online communities
12.5.H.   Develop multi-national and regional level initiatives

13. Knowledge Management

This section provides an analysis of the key functions of knowledge management and how these will be used in order to support learning and sharing.

- Knowledge capture
- Knowledge creation
- Knowledge storage/access
- Knowledge sharing
- Knowledge use

13.1 Knowledge capture

Knowledge capture involves identifying key learning points from our work and from external sources. To ensure the systematic capture of knowledge we will:

13.1.A.   Design our monitoring system to ensure that we record progress made on answering our Learning Questions.
13.1.B.   Ensure our project and program review procedures are used to assess progress made on answering our Learning Questions.
13.1.C.   Prepare case studies to provide in-depth description and analysis of our work, including decision-making processes and the identification of success factors
13.1.D.   Document key areas of our knowledge in the form of tools, training materials, manuals, guidelines, policy documents and strategy documents as appropriate.
13.1.E.   Experiment with alternative ways to capture knowledge such as video and audio interviews, and video and audio story-telling and photo-stories.

13.2 Knowledge creation

Knowledge creation is the development of new knowledge that happens when ideas and practices are combined in innovative ways. Knowledge creation most readily happens as a result of interaction between colleagues (social learning). Knowledge can be created as a result of single-loop and double-loop learning. Single loop learning involves adjusting existing practices in the light of experience whereas double loop learning involves a deeper analysis and questioning of assumptions in order to enable us to respond innovatively to changing circumstances. To maximise the opportunities for knowledge creation we will:

13.2.A.   Set aside adequate time for critical reflection involving interaction between colleagues and with partners.
13.2.B.   Include 'What have we learned that is new?' question to annual reviews
13.2.C.   Give recognition to staff who develop innovative practices or ideas
13.2.D.   Include evaluation questions related to learning and knowledge development in project and program evaluation ToR
13.2.E.   Use Learning Histories to identify and document learning, particularly at thematic area level and at strategic/organisational level.

13.3 Knowledge storage/access

The storage and access of our knowledge base is an essential part of our knowledge management system. To build our systems for knowledge storage and make these accessible, we will:

13.3.A.   Develop our Document Management System
13.3.B.   Acknowledge the importance of individual memory but have a range of ways of documenting and sharing knowledge and experience
13.3.C.   Set up pages on our intranet for our Learning Questions to document the contributions made to answering the Learning Questions.

13.4 Knowledge sharing

Knowledge sharing is the process of making knowledge available to others. To encourage knowledge sharing we will:

13.4.A.   Encourage a culture of sharing in **** by ensuring our senior staff lead by example.
13.4.B.   Schedule time for groups of staff (and appropriate external stakeholders) who are addressing a particular learning question to meet for shared reflection and develop knowledge products.
13.4.C.   Help staff to make use of our Document Management System.
13.4.D.   Make available our branded publications for public download from the **** website.
13.4.E.   Make a wide range of non-sensitive reports and other documents available for public download from our website.
13.4.F.   Use retreats to share innovative practices.
13.4.G.   Encourage informal sharing between colleagues.
13.4.H.   Encourage our staff to contribute to Communities of Practice.

13.5 Knowledge use

Knowledge becomes most valuable when it is used. To maximise the use of the knowledge gained from our own work experience and from others we will:

13.5.A.   Ensure that what we learn (internally and from external sources) is used to influence the design of our projects and programs.
13.5.B.   Make necessary changes to our projects and programs in the light of what we are learning (particularly from answering our Learning Questions).
13.5.C.   Draw broader lessons from our work on a longer timescale and use this knowledge to shape our strategies.
13.5.D.   Apply what we learn by influencing Government thinking, policies, resource allocation and practices.

14. The Role of the Knowledge and Learning Resource Centre

The current Knowledge and Learning Resource Centre (KLRC) is the repository for a physical library of books, articles, publications, videos and many of ****'s reports and grey literature dating back to the early days of the organisation. It is also used as the contact point for enquiries made by students and other professionals in our area of work. The KLRC is managed by the Knowledge Management Officer (KMO) who has 'overall responsibility for the implementation of the strategies for development and management of knowledge and learning of ****'. These responsibilities currently cover the areas of: Learning and Knowledge Management; Management of ****'s Knowledge Centre; Online Services; Documentation, Distribution and Maintenance of Records; Information Collection and Dissemination; Networking and Other Duties.

To maximise the use of the Knowledge and Learning Resource Centre we will:

14.A.   Make our knowledge as accessible as possible to our main target audiences by prioritising an on-line approach making our unclassified documents and other materials available for download from our website.

14.B.   Extend the role of the Learning and Knowledge Management Officer to oversee and become a facilitator of learning processes (e.g. facilitating Learning Histories).

14.C.   As part of the six month review of the implementation of the Learning Framework, review the internal and external use of the Knowledge and Learning Centre and consider staffing levels in the light of the findings from this review.

14.D.   Devise and implement a feedback system from users to assess how they make use of the learning we share with them.

14.E.   Examine the feasibility of using new information and communication technologies (such as smartphones) to access and share knowledge.

14.F.   Consider expanding the scope and role of the Knowledge and Learning Centre, depending on levels of use of and interest in our on-line services.

15. Learning Methods and Techniques

This Learning Framework focuses on the following methods and techniques for learning and sharing:

- Learning Agenda of Learning Questions (for projects, programs, thematic areas and the organisation as a whole)
- Reviews at project and program level that explicitly examine progress made on answering the Learning Questions and capture and reflect on unplanned (emergent) learning.
- Learning Histories that retrospectively document the key events and their implications for decision-making processes during the implementation of significant pieces of work.
- Annual Staff Retreat that includes a focus on sharing the progress made on our Learning Agenda.
- Exposure visits and exchanges that encourage the sharing of ideas between projects and programs and between **** and its partner organisations.
- Case studies that provide an in-depth analysis of the purpose, process, activities, outcomes and learning from a piece of work.

These methods and techniques are described in our *Learning and Sharing Toolkit*. Over time we intend to expand the range of methods and techniques we use regularly for learning and sharing and include the new ideas in our Learning and Sharing Toolkit.

16. Required Organizational Development

16.1 Organisational development

Description of how the implications that adopting the Learning Framework will have on the organisation.

16.2 Individual competence development

We are committed to all of our staff being competent reflective practitioners. They should also be confident about documenting their work. For this they need:

- Reflective practice skills
- Critical thinking skills
- Writing and documentation skills – documenting decision-making processes, preparing Stories of Change, writing case studies, etc.

We recognise that it is difficult for our staff to prioritise the time for reflection, documentation of learning, and knowledge-sharing. We will address this in a number of ways:

- we will emphasise the importance of learning and sharing in the day-to-day responsibilities of all staff;
- we will integrate time for learning and sharing into our existing systems and structures wherever possible;
- we will develop the capacity of staff to become more reflective practitioners and documenters of learning (with those who need this).

We will also develop a small cadre of staff with skills in facilitating learning using a range of methods and techniques.

17. Roles and Responsibilities

Our staff at all levels must be clear about their roles and responsibilities for implementing this Learning Framework. This section provides an overview of these roles and responsibilities.

17.1 Senior staff:

17.1.1.   Provide leadership to implement Learning Framework. This includes prioritising and building in the Learning Agenda in ****'s policies, programs and projects.

17.1.2.   Create an enabling culture to promote learning openly across all levels, horizontally as well as vertically.

17.1.3.   Guide and mentor Program Directors in learning processes.

17.1.4.   Use personal development plans and the appraisal system to encourage as well as ensure staff take learning seriously.

17.1.5.   Encourage and reward staff to become reflective and critical while developing program/project documents or reviewing them.

17.1.6.   Allocate adequate resources, financial as well as human, to implement the Learning Framework, including establishing databases, the Knowledge and Learning Centre, documentation, tailor-made training programs, workshops, seminars, etc. to disseminate learning to wider audience.

17.2 Program Directors:

17.2.1.   Take a lead on implementing the Learning Framework across all programs and projects. Develop learning questions in consultation with concerned stakeholders and staff responsible for programs and projects

17.2.2.   Identify resources required, human as well as financial, to answer Learning Questions

17.2.3.   Build Learning Questions into annual work plans, reviews and monitoring and evaluation system.

17.2.4.   Use the *Learning and Sharing Toolkit* and orientation programs to enable staff to implement the Learning Framework.

17.3 Program Officers/Program Managers:

17.3.1.   Take the lead to incorporate Learning Questions in program/project planning and review meetings.

17.3.2.   Train, coach, and guide subordinates using the *Learning and Sharing Toolkit* to be able to capture learning at program and project levels.

17.3.3. Work closely with the Monitoring and Evaluation team to ensure progress in answering Learning Questions is monitored and documented, and provide technical backstop as and when required.

17.3.4. Use review meetings and retreats to reflect on learning processes and how they are being captured, shared and applied to improve program/project effectiveness/efficiency.

17.4 Project Managers:

17.4.1. Take a lead to implement the Learning Framework at project level, including taking lead in answering project related Learning Questions.

17.4.2. Take leadership in creating an open and trusting learning culture at the field level.

17.4.3. Provide adequate support (guiding/coaching/training) to create learning and sharing culture amongst project staff members as well as field level stakeholders, partners and communities.

17.4.4. Encourage project staff to become more reflective and critical in their approaches and thinking while implementing field programs.

17.4.5. Use monitoring and evaluation system (reporting formats) not only to capture progress towards project goals and objects but also in answering learning questions.

17.5 Project Staff

17.5.1. Maintain a diary of work reflections.

17.5.2. Use a log book to record, describe and explain significant events that are either related to, or have bearing on, projects.

17.5.3. Use regular meetings to reflect on the work progress, focusing particularly on any implications for the planned program activities.

17.5.4. Use review meetings, project evaluation, community meetings and meetings with partner organisations/stakeholders to reflect and share on project and program level learning and the implications of that for the future planning and programming.

17.5.5. Record and reflect on success stories and best practices, particularly on what makes these outstanding.

17.6 M&E Staff

17.6.1. Incorporate Learning Questions in the monitoring and evaluation system

17.6.2. Review and revise the current reporting templates to ensure that learning during the reporting period is adequately captured.

17.6.3. Design and deliver orientation/training programs as well as provide technical support on use of reporting format and templates.

17.6.4. Compile, synthesise and summarise learning six-monthly and annually.

17.6.5. Facilitate reflection meetings at organisational, program and project levels to discuss learning questions, share lessons learnt and identify the implications of these on the program and project deliverables, including on the logframe.

17.6.6. Ensure that lessons distilled at organisational and program levels are fed back to staff at project level.

18. Implementation Road Map

In order to implement the Learning Framework, we will take a staged approach, starting with an initial 12-month plan as described in Annex 4.

Annex One: Glossary

Competence	Competence is the capacity to use knowledge and skills for specified purposes. An individual's competence is related to their ability to fulfil the requirements of their work.
Double Loop Learning	Learning that questions the assumptions or Theory of Change that underpins the design and implementation of a piece of work.
Facilitation	An approach to guided learning, growth and development that involves drawing out and building on the existing knowledge and skills of others.
Knowledge Hierarchy	A conceptual model that links data, information, knowledge and wisdom by demonstrating how each higher level adds value to the previous one.
Knowledge Management	Knowledge management (KM) comprises a range of strategies and practices used in an organization to identify, create, represent, distribute, and enable the adoption of knowledge that is either embodied in individuals or embedded in organizations as processes or practices.
Learning	Learning is the process of acquiring new, or modifying existing, knowledge, behaviours, skills, attitudes or values. Learning takes place most effectively through ongoing dialogue between people; needs an open, supportive and trusting environment and happens through the exploration of challenging questions.
Learning Agenda	A statement of learning priorities for ****, written in the form of Learning Questions at project, program and organisational levels.
Learning Framework	An overview of the systems, structures, capacities and resources required for organisational learning and knowledge management.
Learning History	A method for learning from past experience. It is a systematic way of developing a shared understanding of a piece of work. Creating a learning history is a constructively self-critical process that can help to improve future practice.
Learning Questions	Questions that are devised to define and focus an organisation's priorities for learning, knowledge creation and knowledge sharing as an organisation. Learning questions are open questions that encourage reflection, analysis, and action.

Sample outline Learning Framework

Lesson	A lesson is useful knowledge distilled from experience that establishes principles for guiding action.
Organisational Learning	The processes by which an organisation becomes skilled at creating, acquiring, interpreting, transferring and retaining knowledge, and purposefully modifying its behaviour to reflect new knowledge and insights.
Reflective Practitioner	A reflective practitioner is an individual who is skilled in the process of reflecting on his/her practice whilst carrying out their work, and doing so in a way that enables them to do their job more thoughtfully and effectively. Reflective practitioners are skilled in single and double loop learning.
Single Loop Learning	Learning leading to adjustments in the implementation of a piece of work without questioning the assumptions or Theory of Change underpinning the work

Sample outline Learning Framework

Annex Two: Documenting Learning and Sharing

Documents	Contribution to learning and sharing	Lead responsibility	Timing of document
Project and Program Proposals/Documents	Identify learning agenda for each project/program, current and in pipeline. Develop learning questions and learning strategies, as appropriate. The learning strategies should focus on how learning questions will be developed, benefit of answering learning questions, and who will play the lead role in answering learning questions		
Project and Program Log-frame	Incorporate learning questions in the log-frame. Ensure learning questions are built in the monitoring and evaluation system and they become mandatory in program/project management cycle.		
Operational Plans	Incorporate learning questions within the operational plans or annual work-plan. Identify who will be responsible for answering each of learning question, how will they be generated, reviewed, documented and shared.		
Annual Project Review	Review progress in answering learning questions. Identify, discuss and document both planned and emergent learning, and their implication on the on-going program activities. Identify both 'success' and change 'factors' and program/project's responses.		

Sample outline Learning Framework

Documents	Contribution to learning and sharing	Lead responsibility	Timing of document
Project Midterm Report	Review progress in answering learning questions. Identify and document both planned and emergent learning, and their implication on the on-going program activities. Identify both 'success' and change 'factors' and program/project's responses.		
End of Project Report	Capture and distil key learning during the program/project period and their significance for developing new programs/projects and for the overall growth of the organisation		
Strategy Documents	Establish learning agenda, and significance of this to our organisation's work		
Case Study	In-depth analysis of the purpose, process, activities, outcomes and learning from a piece of work.		
Manuals and Guidelines	Practical guidance - based on experience - for how to carry out a particular area of work. Includes factors to consider; good practices; step-by-step procedures, success factors and examples of successes and unexpected outcomes.		
Learning History	Provides a retrospective summary of what has been learned during a specified piece of work or thematic area. The document comprises a timeline, analysis of what influenced key decisions, learning arising from the work, and recommendations for how the learning could be used to improve the design, planning, and implementation of future projects and programs.		

Sample outline Learning Framework

Documents	Contribution to learning and sharing	Lead responsibility	Timing of document
HR Policy and Procedure	Systematise review and retreat programs to focus on learning. This may include sending out key questions in advance to staff members to discuss in these programs. Systematise exist interviews to enhance institutional memory as well as to smoothen the transition. Highlight the importance of learning within **** and the role new staff members can play or has to foster learning environment in the orientation program.		

Sample outline Learning Framework

Annex Three: Action Planning and Measuring Change

Some potential areas that could be included

	Action points	Output	How change can be measured
Individual Level			
12.1 Individual Level Learning	12.1.A. Require all staff to fulfil their responsibilities for learning and sharing as described in section 17 of this document.	Staff are able to explain their responsibilities for learning and sharing as described in section 17 of this document. All staff fulfill their responsibilities for learning and sharing as described in section 17 of this document	Discussion through performance evaluation system.
12.1 Individual Level Learning	12.1.C. Create an organisational culture that encourages learning from unplanned outcomes and celebrates successes.	The organisational culture encourages learning from unplanned outcomes. Staff share unplanned outcomes and mistakes without fear of criticism and learn from these. Successes are celebrated.	Staff climate survey.
12.1 Individual Level Learning	12.1.D. Provide all staff with a thorough orientation to our Learning Framework and the role they are expected to play.	Orientation process for new includes a session on the Learning Framework. All staff are clear about the role they are expected to play in the Learning Framework.	Examine documentation for orientation of new staff. Staff climate survey.
12.1 Individual Level Learning	12.1.L. Require staff to prepare at least one documented story highlighting their learning for discussion at each six-monthly performance evaluation meeting	Staff prepare at least one documented story highlighting their learning for discussion at each six-monthly performance evaluation meeting. The stories are discussed at their six-monthly performance evaluation meetings.	Examine documented stories. Examine documentation for performance evaluation system.

Sample outline Learning Framework

	Action points	Output	How change can be measured
Etc			
Project Level			
12.2 Project Level Learning	12.2.A. Include Learning Questions at the inception and design stage of all of our projects, involving potential partners whenever possible	Inception documents include Learning Questions

Potential partners are involved in the preparation of these documents. | Examine inception documents. |
| 12.2 Project Level Learning | 12.2.B. Devise Learning Questions for existing projects with the participation of communities and other partners | All existing projects have Learning Questions.

Communities and other partners are involved in the development of the learning questions. | Examine documentation for existing projects. |
12.2 Project Level Learning	12.2.C. Hold a starting workshop for each project/program in which Learning Questions are documented and strategies for answering the Learning Questions are agreed.	Every project has had a starting workshop in which the Learning Questions are documented and strategies for answering the Learning Questions are agreed.	Examine reports of starting workshops.
11.1 Project/Program definition	11.1.A. Be clear about what the initial project design team members can contribute in terms of skills, experience and knowledge.	Project design team members are selected on the basis of what they contribute in terms of skills, experience and knowledge.	Examine composition of design teams.
11.1 Project/Program definition	11.1.B. Identify any knowledge gaps in our design team and, if necessary, find sources of expertise to fill those gaps.	Knowledge gaps in the project design team and, if necessary, find sources of expertise to fill those gaps.	Examine project design documentation.
11.1 Project/Program definition	11.1.D. Identify broad learning goals (that will become more specific Learning Questions) for the project.	Each project design includes a set of broad learning goals	Examine project design documentation.

Sample outline Learning Framework

	Action points	**Output**	**How change can be measured**
11.2 Project/Program Design	11.2.A. Carefully review and incorporate relevant lessons from past and current experience into the project/program design by referring to documented lessons from project and program reviews.	All project designs refer to documented lessons from previous project and program reviews and incorporate relevant lessons from past and current experience.	Examine project design documentation.
11.3 Project/Program Implementation	11.3.A. Ensure that workplans and budgets are realistic in the light of previous experience.	Workplans and budgets are realistic in the light of previous experience	Examine workplans and budgets. Discuss with project staff.
11.3 Project/Program Implementation	11.3.B. Ensure that the project has (or can develop) the necessary capacity to achieve its goals (based on our previous experience).	The project has the necessary capacity to achieve its goals	Examine Technical Reports. Discuss with project staff.
11.3 Project/Program Implementation	11.3.C. Build strategies and mechanisms for answering Learning Questions in workplans.	Workplans include strategies and mechanisms for answering Learning Questions.	Examine workplans. Discuss with project staff.
11.3 Project/Program Implementation	11.3.D. Document progress made in answering Learning Questions including budget for the development of communication materials.	Progress made in answering Learning Questions is documented. Project proposal includes budget for the development of communication materials.	Examine documentation (page on intranet, review documents). Discuss with project staff.
Etc.			

Sample outline Learning Framework

	Action points	Output	How change can be measured
11.4 Project/Program Analysis/Adaptation	11.4.A. Re-assess, when necessary, the assumptions (Theory of Change) that underpin the project design at the mid-term review.	The assumptions (Theory of Change) that underpin the project design are re-assessed at the mid-term review	Examine documentation (page on intranet, review documents). Discuss with project staff.
11.4 Project/Program Analysis/Adaptation	11.4.B. Incorporate Learning Questions in our monitoring system and gather data that will help to answer the Learning Questions.	Data that will help to answer the Learning Questions is gathered throughout the implementation. Progress in answering the Learning Questions is monitored.	Examine documentation (page on intranet, review documents). Discuss with project staff.
etc			
11.5 Project/Program Sharing	11.5.A. Document the answers to our Learning Questions in Technical Reports and illustrate these with stories and examples that illustrate both successes and unplanned outcomes	Progress made in answering Learning Questions is documented in Technical Reports Technical Reports include stories and examples that illustrate both successes and unplanned outcomes.	Examine Technical Reports. Discuss with project staff.
11.5 Project/Program Sharing	11.5.B. Include discussion of Learning Questions and other lessons learned on the agendas for Project Executive Meetings and Project Steering Committee Meetings	Project Executive Meetings always include discussion of Learning Questions and other lessons learned from project implementation. Key points are recorded. Project Steering Committee Meetings always include discussion of Learning Questions and other lessons learned from project implementation. Key points are recorded.	Examine minutes of Project Executive Meetings. Examine minutes of Project Steering Committee Meetings. Discuss with participants of meetings.
etc			
Thematic Working Area Level			

Sample outline Learning Framework

	Action points	Output	How change can be measured
12.3 Thematic Working Area Level Learning	12.3.A. Include in our Learning Agenda, Learning Questions related to each of the thematic areas	**** has a documented Learning Agenda that includes Learning Questions related to each of the thematic areas.	Examine Learning Agenda. Discuss with senior staff.
12.3 Thematic Working Area Level Learning	12.3.B. Ensure that progress on answering the Learning Questions is recorded, discussed and assessed	Progress made on answering the Learning Questions is recorded, discussed and assessed.	Examine documentation (page on intranet, review documents). Discuss with project staff.
etc			
Strategic/Organizational Level			
12.4 Strategic / Organizational Level Learning	12.4.A. Devise Learning Questions linked to the strategic objectives	All strategic objectives have associated Learning Questions in our Learning Agenda.	Examine Learning Agenda
12.4 Strategic / Organizational Level Learning	12.4.B. Use Learning Histories, where appropriate, to make sense of and document the evolution of our work and the wider and longer-term lessons learned	Learning Histories have been used to make sense of and document the evolution of our work and the wider and longer-term lessons learned.	Examine Learning History documentation.
12.4 Strategic / Organizational Level Learning	12.4.C. Ensure that what we learn from these strategic-level Learning Questions influences our thinking about our organisation's strategic direction, priorities and alliances.	What we learn from our strategic-level Learning Questions has influenced our thinking about our organisation's strategic direction, priorities and alliances.	Discussion with senior staff.
Knowledge Management			

Sample outline Learning Framework

	Action points	Output	How change can be measured
13.1 Knowledge Capture	13.1.A. Design our monitoring system to ensure that we record progress made on answering our Learning Questions	Monitoring system includes records of progress made on answering our Learning Questions	Online survey of knowledge management
13.1 Knowledge Capture	13.1.B. Ensure our project and program review procedures are used to assess progress made on answering our Learning Questions	Project and program review procedures assess progress made on answering our Learning Questions	Online survey of knowledge management
13.1 Knowledge Capture	13.1.C. Prepare case studies to provide in-depth description and analysis of our work, including decision-making processes and the identification of success factors.	Case studies written that provide in-depth description and analysis of our work, including decision-making processes and the identification of success factors.	Online survey of knowledge management
13.1 Knowledge Capture	13.1.D. Document key areas of our knowledge in the form of tools, training materials, manuals, guidelines, policy documents and strategy documents as appropriate.	training materials, manuals, guidelines, policy documents and strategy documents written that document key areas of knowledge.	Online survey of knowledge management
13.1 Knowledge Capture	13.1.E Experiment with alternative ways to capture knowledge such as video and audio interviews, and video and audio story-telling and photo-stories.	Examples of alternative ways to capture knowledge including video and audio interviews, and video and audio story-telling and photo-stories	Online survey of knowledge management

Sample outline Learning Framework

	Action points	**Output**	**How change can be measured**
13.2 Knowledge Creation	13.2.A. Set aside adequate time for critical reflection involving interaction between colleagues and with partners.	Time set aside for critical reflection involving interaction between colleagues and with partners.	Online survey of knowledge management
13.2 Knowledge Creation	13.2.B. Include 'What have we learned that is new?' question to annual reviews.	All annual reviews include the question 'What have we learned that is new?' Annual review reports include answers to the question 'What have we learned that is new?'	Examination of Annual Review documentation. Online survey of knowledge management
13.2 Knowledge Creation	13.2.C. Give recognition to staff who develop innovative practices or ideas.	A recognition system for staff who develop innovative practices or ideas is agreed and in place. Staff who have developed innovative practices or ideas have received recognition in accordance with the system.	Examination of recognition system. Online survey of knowledge management
13.2 Knowledge Creation	13.2.D. Include evaluation questions related to learning and knowledge development in project and program evaluation ToR.	All project and program evaluation ToR include evaluation questions related to learning and knowledge development. Project and program evaluation reports have examples of how these evaluation questions have been answered.	Examination of project and program evaluation ToR and reports. Online survey of knowledge management
13.2 Knowledge Creation	13.2.E. Use Learning Histories to identify and document learning, particularly at thematic area level and at strategic/organisational level.	Learning Histories have been used to identify and document learning, particularly at thematic area level and at strategic/organisational level.	Examine documentation. Online survey of knowledge management

Sample outline Learning Framework

	Action points	Output	How change can be measured
13.2 Knowledge Creation	13.2.F. Commission scientific research studies.	Scientific research studies have been commissioned.	Examine reports of scientific research studies. Online survey of knowledge management
13.3 Knowledge Storage/access	13.3.A. Develop our Document Management System as described in section 13.6	The Document Management System operates based on the ideas described in section 13.6.	See section 13.6 items below. Online survey of knowledge management
13.3 Knowledge Storage/access	13.3.B. Improve our computer filing system of shared drives and ensure that these are backed up regularly.	The computer filing system of shared drives operates on 'best practice' criteria. Shared drives are backed up regularly.	Statistics for backup. Satisfaction scores from **** staff. Online survey of knowledge management
13.3 Knowledge Storage/access	13.3.C. Acknowledge the importance of individual memory but have a range of ways of documenting and sharing knowledge and experience.	There are diverse examples of how knowledge and experience have been documented and shared.	Examine a range of documentation (including video, photos and audio). Online survey of knowledge management
13.3 Knowledge Storage/access	13.3.D. Set up pages on our intranet for our Learning Questions to document the contributions made to answering the Learning Questions.	There are pages on our intranet for our Learning Questions. These pages are regularly updated to document the contributions made to answering the Learning Questions.	Examination of intranet. Access statistics for pages. Online survey of knowledge management
13.4 Knowledge sharing	13.4.A. Encourage a culture of sharing in **** by ensuring our senior staff lead by example.	Senior staff demonstrate leadership by acting consistently with the roles and responsibilities described in section 17.1.	Self-reporting by senior staff. Online survey of knowledge management

Sample outline Learning Framework

	Action points	Output	How change can be measured
13.4 Knowledge sharing	13.4.B. Schedule time for groups of staff (and appropriate external stakeholders) who are addressing a particular learning question to meet for shared reflection and develop knowledge products.	There are documented examples of meetings where groups of staff (and appropriate external stakeholders) who are addressing a particular learning question to meet for shared reflection. A range of diverse knowledge products have been produced from these meetings.	Examination of meeting notes/minutes. Examination of knowledge products that have been produced from the meetings. Online survey of knowledge management
13.4 Knowledge sharing	13.4.C. Help staff to make use of our Document Management System.	All staff actively use the Document Management System.	Examine usage statistics provided by software company involved in setting up DMS. Online survey of knowledge management
13.4 Knowledge sharing	13.4.D. Make available our branded publications for public download from the **** website.	Branded publications are available for public download from the **** website	Count downloads made for each document. Online survey of knowledge management
13.4 Knowledge sharing	13.4.E. Make a wide range of non-sensitive reports and other documents available for public download from our website.	A wide range of non-sensitive reports and other documents are available for public download from our website	Count downloads made for each document. Online survey of knowledge management
13.4 Knowledge sharing	13.4.F. Use retreats to share innovative practices.	Examples of innovative practices shared at retreats.	Retreat agendas and reports. Online survey of knowledge management

Sample outline Learning Framework

	Action points	Output	How change can be measured
13.4 Knowledge sharing	13.4.G. Encourage informal sharing between colleagues.	Colleagues share experience and knowledge informally.	Online survey of knowledge management
13.4 Knowledge sharing	13.4.H. Encourage our staff to contribute to Communities of Practice.	Staff are members of appropriate Communities of Practice. Staff contributions made regularly to Communities of Practice.	Examine membership lists and activity stats of Communities of Practice. Online survey of knowledge management
13.4 Knowledge sharing	13.4.I. Publish our scientific research studies (and wherever possible in peer-reviewed journals).	Published research.	Examine published research. Online survey of knowledge management
13.5 Knowledge Use	13.5.A. Ensure that what we learn (internally and from external sources) is used to influence the design of our projects and programs (see section 11).	Project and program documentation with evidence that demonstrates how learning has influenced the design.	Examine project and program documentation. Online survey of knowledge management
13.5 Knowledge Use	13.5.B. Make necessary changes to our projects and programs in the light of what we are learning (particularly from answering our Learning Questions).	Evidence of adaptive management as a result of project/program reviews.	Examine project/program documentation. Online survey of knowledge management

Sample outline Learning Framework

	Action points	Output	How change can be measured
13.5 Knowledge Use	13.5.C. Draw broader lessons from our work on a longer timescale and use this knowledge to shape our strategies.	Learning Agenda includes questions related to ****'s strategic objectives. The strategic planning process actively draws on lessons learned from ****'s work. Subsequent strategies provide evidence of how strategy has been influenced by organisational learning.	Discussion with senior staff to identify examples of how strategy has been influenced by organisational learning. Online survey of knowledge management
13.5 Knowledge Use	13.5.D. Apply what we learn by influencing Government thinking, policies, resource allocation and practices.	Changes in Government thinking, policies, resource allocation and practices that are attributable to **** influence. Requests from Government to **** staff to be involved in policy development, etc.	Changes in Government thinking, policies, resource allocation and practices that are attributable to **** influence. Online survey of knowledge management
13.5 Knowledge Use	13.5.E. Influence the thinking and practices of other organisations by actively engaging in discussions and workshops on policy and practice development.	**** staff actively involved in discussions and workshops on policy and practice development Changes in other organisations' thinking and practices attributed to **** experience.	Survey of other organisations. Online survey of knowledge management
13.6 Document Management System (DMS)	13.6.A. Make the DMS more user-friendly (e.g., ensuring that each uploaded document includes a front-page summary that describes learning points and innovative practices.	Each document uploaded to DMS includes a front-page summary that describes learning points and innovative practices.	Examine usage statistics provided by software company involved in setting up DMS.
etc			

Sample outline Learning Framework

Annex Four: Learning Framework Road Map

Activity	Who is responsible?	When?	Resources
1.			
2.			