THE LEARNING PROCESS

1. Conceptual and methodological framework
People who work in organizations, whatever the mission and purpose of our work, are constantly learning ... but sometimes we ask ourselves:

- How can we encourage the ownership of lessons learned by colleagues within the same organization or outside of it?
- Why would it be worth making the effort to convert an individual lesson learned into a group lesson learned?
- How can we ensure that the lesson learned is converted into knowledge?
- How can we contribute our individual lessons learned to the culture of institutional learning?
- Are the organizations learning at our pace?

An organization open to learning from its hits and misses is not only willing to improve its current work but also to reconsider its goals and strategies, and even reflect on the pertinence of its institutional mission and make the necessary adjustments. Through commitment to a culture of learning, organizations are also committing to strategies to maximize and scale the impacts of their work, ensure sustainability, inspire others and become weavers of communities of practice.
This material covers these questions and has been developed with the intention of supporting people or organizations interested in strengthening the culture of institutional learning. The “roadmap for a learning process focused on lessons learned”, which is the basis for the contents of this material, is the result of almost 10 years of work by the WWF US Forest and Climate team in conjunction with the teams from WWF Colombia, WWF Guyana, WWF Indonesia, WWF Peru and WWF Democratic Republic of Congo. The conceptual and methodological foundations, as well as the various tools provided for consideration, have mainly been developed within the framework of the project From REDD+ Agreements to REDD+ Results: Generating Results to Secure Consensus, a program supported by the Norwegian Agency for Development Cooperation and Norway's International Climate and Forest Initiative.
The ideas and tools set out here are intended to be a source of inspiration and not a recipe to be followed to the letter. The complete series includes 10 animations and 10 PDFs, one for each video:

1. Conceptual and methodological foundations of the roadmap for the learning process.

2. General introduction to the toolbox for the four phases of the roadmap.

3. Tools for phase 1: Set-up and Framing.

4. Introduction to the tools for phase 2: Implementation of the methodology.


8. Tools for phase 4: Communicating and creating ownership of the results of the learning process.

9. Tool to design mini-communication strategies.

10. Lessons learned and reflections on institutional learning processes.
1. CONCEPTUAL AND METHODOLOGICAL FRAMEWORK

This learning process is an invitation to reflect collectively on a specific experience. It is a methodological process that allows us to, among other things, organize memories and information; the documented information, as well as that which is in the memories of those connected to the experience, is organized.

But the learning process is not just about organizing information... The learning process helps, above all, to guide reflections and analysis; it is not merely a descriptive process. The learning process demands a reflective and analytical relationship with the elements of the experience. For example, the relationship between what was planned and what was implemented; the practice and its relations with the context within which said practice occurs; what has worked
well, what has failed, and why… in summary, the learning process seeks to answer one or several questions posed by a group of actors connected to the experience.

One of the most important aspects of this approach is that the learning process allows us to gather lessons learned. Lessons learned are a result of individual or collective reflection; they refer to aspects that we had not identified during the experience, or that we had perceived differently before reflecting upon them.

In summary: the learning process allows for a group of actors to reflect upon a topic of interest.

The learning process is guided by a series of questions whose answers—resulting from collective reflections—will provide lessons learned and recommendations that can be applied at a different level.
There are several learning levels *, which can coexist in institutional life.

3

POLICIES

THIRD LEVEL
Transforming policies and the institutional context

3

INSTITUTIONAL CONTEXT

2

VALUES

GOALS

ASSUMPTIONS

OBJECTIVES

RESULTS

REFLECTION

ACTIONS

PLANNING

SECOND LEVEL:
Reconsidering the goals, values, objectives and strategies

2

1

FIRST LEVEL:
Improving practice

1

The third learning level answers strategic, ethical, and political questions about the organization's mission in a specific context. The conclusions lead to reconsidering, and in many cases transforming, institutional policy and context. This learning level impacts the whole program cycle. It takes place, for example, when an organization is designing or updating its strategic plan.

At the second level of institutional learning, we ask if we have defined the correct goals, if we are using the proper measures, if our work strategies are effective...
The conclusions lead us to reformulate or reaffirm goals, objectives, values, assumptions, and strategies...

The first level of institutional learning allows us to improve what we do. There is no fundamental reframing of any of the elements of the program cycle; this level of learning explores how we do what we do.

* Own elaboration from: “Designing a learning system for the Forest Resilience Programme and wider portfolio of WWF Colombia: 2nd – 5th October 2012, Bogotá (Hotel Los Héroes). Report (v10), John Colvin & Ruth Silva, 26th October 2012"
A learning process exercise begins when a group of people pose questions about a concrete experience, at any moment of its development. It starts with the organization of memories and information and then focuses on analysis and reflection. In the end, several results must be produced, including lessons learned, diverse reflections, and recommendations. All of them must be incorporated into practice, at one of the three learning levels.
It is very important that the actors participating in a learning process agree to carry out the process based on its four underlying principles:

**GUIDING PRINCIPLES**

**PRINCIPLE OF INCLUSION**
Which means opening the reflection and analysis process to the participation of all relevant actors. It also implies considering perspectives such as gender, generational, ethnic, and cultural—whenever pertinent.

**PRINCIPLE OF TRANSPARENCY**
Which means allowing the experience to be “revealed” to interested parties. Being willing to openly share memories, information, ideas, and reflections.

**PRINCIPLE OF HONESTY**
Which implies being willing to analyze, reflect, and learn from successes as well as from mistakes. The latter provide great value in individual and institutional learning processes.

**PRINCIPLE OF CONFIDENTIALITY**
Which consists of only sharing the information agreed upon by the parties and under the conditions of discretion deemed appropriate.
A learning process exercise is developed thanks to the collaborative work of a team. The team is a triad formed by the key actors—i.e., the group of people who are interested in going through the learning process; the focal points, who are designated by the key actors to provide the operational and logistical support required during the process; and the team who facilitates the learning process and is in charge of coordinating the design and implementation of the methodology and produces the report that compiles the lessons learned, reflections, and recommendations.
To implement the learning process, a 4-phase roadmap has been designed. The 4 phases are: set up and framing; implementation of the methodology; preparation and discussion of the report; and finally, sharing and ownership of the results.

THE FOUR PHASES OF THE LEARNING PROCESS

1. SET UP AND FRAMING
2. IMPLEMENTATION OF THE METHODOLOGY
3. PREPARATION OF REPORT AND DISCUSSION OF RESULTS
4. SHARING COMMUNICATION AND OWNERSHIP

PHASE 1. SET UP AND FRAMING

The key stakeholders define the fundamental aspects of the learning process: the objectives and expected results, the guiding questions, the actors, the audiences, and the methodology.
PHASE 2. IMPLEMENTATION OF THE METHODOLOGY

In this phase, the facilitation team leads the application of tools that will help answer the guiding questions outlined by the learning process.

PHASE 3. PREPARATION AND DISCUSSION OF THE REPORT

In phase 3, the facilitation team develops, shares, and validates the learning process report with key actors. The report includes the answers to the guiding questions, recommendations, lessons learned, and any other reflection that contributes to the achievement of the expected results.

PHASE 4. SHARING AND OWNERSHIP OF THE RESULTS

Finally, in phase 4, communications materials are produced to reach the internal and external audiences prioritized during the set up and framing phase, and a roadmap is defined to promote ownership of the lessons learned amongst target audiences.
The 4-phase roadmap of the learning process can be implemented in a linear or systemic manner. The linear roadmap is convenient under the following circumstances:

**LINEAR PROCESS**

When the group of actors decides to make a stop in the middle of their process and wants to gather recommendations and lessons learned to apply them to the rest of their experience.

At the end of a process to gather lessons learned and recommendations that can be applied in the next phases or in new processes.

When a new process is being designed or planned and lessons learned and recommendations from previous or similar experiences will be considered in this design or planning process.
When we apply the roadmap to ongoing processes, the format is more systemic, not linear, because we will be going from one phase to the next for the duration of the learning process. In these cases, the learning process supports the implementation of the ongoing process. Under this systemic approach, new guiding questions are introduced as they emerge, guiding questions are answered throughout the process, reports are quickly prepared and handed over to the key players for their immediate application, in an ongoing manner throughout the rest of implementation of the experience being analyzed.

To continue with our learning process..........................

We are thus completing the overview of the conceptual and methodological foundations of the learning process focused on lessons learned. In the next document, we will briefly return to the learning process roadmap and the tools used in the different phases.