2. Introduction to the Toolkit
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.
INTRODUCTION TO THE TOOLKIT

Remember that a learning process exercise begins with a group of people posing questions about a specific experience, in any moment of its development. It starts with the organization of memories and information, but then focuses on analysis and reflection.

In the end, several results must be generated, including lessons learned, the range of reflections, and recommendations. All of them are to be applied in practice.
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

Each one of the 4 phases of the learning process has an objective.
PHASE 1: SETUP AND FRAMING

The key actors define the fundamental aspects of the learning process:

What is the objective? What are the expected results? What are the questions that the learning process must answer? Who should participate? Who should the results be shared with and through what channels? What methodologies and tools must be used to promote reflection and analysis during the learning process exercise?
These questions are posed during the framing interview and are presented in the framing report developed by the facilitation team.

The framing interview helps define the key elements of the learning process; it is led by those who are facilitating the learning process and is applied to the key actors; remember that the key actors are those who have an interest in the learning process being carried out.

The framing report is the “navigation guide” for the learning process exercise; it should consolidate and organize the information gathered from the framing interviews as well as that from the document review process.
Phase 2 corresponds with the implementation of the methodology defined during set up and framing.

In this phase, the facilitation team leads the application of tools that will help answer the learning process's guiding questions. Some of the tools used are interviews and group exercises.
PHASE 3: PREPARATION OF REPORT AND DISCUSSION OF RESULTS

The facilitation team develops a learning process report that includes the answers to the guiding questions, recommendations, lessons learned, and any other reflection that contributes to the learning process’s expected results.

Based on the results of PHASE 2

Performing by the facilitation team

LEARNING PROCESS REPORT

RECOMMENDATIONS

LESSONS LEARNED

ANSWERS TO GUIDING QUESTIONS

REFLECTIONS

Reviewed and validated by key stakeholders.

This report is reviewed, discussed, and validated with the key actors until a version where all parties agree that the expectations of the learning process have been met is reached.
PHASE 4: SHARING, COMMUNICATION AND OWNERSHIP

Once an agreement has been reached with the key actors about the results of the learning process, the production of communications materials is finalized during phase 4, and the mechanisms and channels to reach the audiences (internal and external) prioritized during the framing phase are prepared.

Phase 4 also includes an effort to achieve ownership of the lessons learned. It consists of ensuring knowledge is developed through the incorporation of lessons learned and recommendations for planning, monitoring, evaluation, and implementation, depending on the context and level of the learning process. To achieve this objective, we have designed a lessons learned validation and ownership roadmap, which is the end goal of a learning process.
To continue with our learning process

Now we have seen this brief introduction to the phases and their tools, in Document 3 we will go into greater depth concerning the tools in phase I.
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