THE LEARNING PROCESS

3. Tools for Phase I.
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 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.
Remember that in Phase 1, called setup and framing, the key actors define the fundamental aspects of the learning process. We have two tools to achieve this objective: the framing interview and the framing report.

**PHASE 1: SETUP AND FRAMING**

**FRAMING INTERVIEW**

The framing interview is led by those who are facilitating the learning process and is applied individually to a maximum of 5 people who are part of the key actors; remember that the key actors are those who have an interest in the learning process being carried out.

This interview begins with an introduction (which is written and read when the interview is conducted), a short sentence that explains what the learning process is for, i.e. the process and timeframe to which the exercise will be applied.
The framing interview helps define the key elements of the learning process. The key actors are asked:

What issues or areas should the learning process focus on?

Considering those key issues, which actors should be taken into consideration for this learning process and why?

What will this learning process be useful for? In other words, what are the expected results?

Ideas for the methodology (types of activities to implement, duration of the interviews, group exercises, etc.)

Who should the results of the learning process be shared with and what is the best channel to reach each of those actors?

How much time and money will be available to implement the learning process?

Any additional suggestions that the facilitation team should take into account?
The framing report is the “navigation guide” for the learning process exercise. It allows the key actors and the facilitation team to have all the elements, in a single document, that will guide the learning process, the reason it’s being implemented, and how it will be implemented.

This report is prepared by the facilitation team; it should consolidate and organize the information gathered from the framing interviews as well as that from the document review process.
The report can have the following structure:

- **Header**: What learning process is this—if necessary, include a footnote indicating the project that this learning process is a part of.
- **Objective**
- **Expected results**
- **Key issues and guiding questions**
- **Stakeholders who should participate in the learning process**
- **Audiences for the learning process results**
- **Methodology and tools**
- **Next steps**: The roadmap and timetable for phases 2, 3, and 4 with clear tasks and responsible parties.

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

When all these topics are clear, we can begin phase 2, the implementation of the methodology. In the next document you will learn more about the tools used during that phase.
APPENDIXES
Learning process framing report script

**Heading:** The learning process in question (if necessary, include a footnote indicating the project that this learning process is a part of). The period during which the framing was carried out. Clarify that this is the learning process framing report. The date on which the framing report was produced. Author of the framing report.

**Objective:** The objective is established based on the name of experience to which the learning process will be applied. It is a sentence that expresses how the learning process will contribute to the experience being analyzed.

**Expected Results** - or this learning process will serve to ...: the expected results are expressed after consolidating the answers from the framing interviews with the related question.

**Key issues and guiding questions:** a summary (prepared by the facilitation team) based on the key issues or areas of interest expressed by the interviewees during the framing interviews.
Stakeholders who should participate in the learning process: a list of people who should be convened for the various group exercises or interviews that will take place during phase 2 of the learning process. It is important to note if the stakeholders must be interviewed, convened to workshops, or both, and to which of the key issues they can best contribute to.

Audiences for the learning process results: lists of stakeholders with whom the results of the learning process will be shared, the best channels to reach them, and why.

Methodology and tools: in this section of the report the facilitation team describes the methodology they will use to find the answers to the guiding questions and the type of methods they will implement: focus groups, workshops, case studies, testimonials, etc.

Next steps: the roadmap and timetable for phases 2, 3, and 4 with clear tasks and the responsible parties.
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