THE LEARNING process

4. Introduction to the Tools for Phase 2
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 TOOLS FOR PHASE 2

Remember that phase 2 corresponds to the implementation of the methodology defined during the setup and framing phase.

PHASE 2: Implementation of the Methodology

During this phase, the facilitation team leads the application of tools that will help answer the guiding questions established by the learning process, as well as gather lessons learned, recommendations, and various reflections on the experience being analyzed. The tools may be designed through a variety of methods, such as interviews and group exercises.
The interviews proposed in the context of this learning process approach are conversations guided by questions whose answers contribute to achieving the learning process’s expected results.

During this phase, basic and in-depth interviews can be conducted. Basic interviews explore the experience in general terms, while in-depth interviews are more comprehensive and ask about certain descriptive and analytical aspects of the experience.
On the other hand, the learning process favors building collective thinking to capitalize on lessons learned, recommendations, and general reflections, which are precisely the most desired outcomes of the learning process under this approach. Building collective thinking can be achieved by applying group exercises.

To implement these exercises, we use ANALOGIES, which are images that represent an experience. Based on the ELEMENTS of the analogy, different moments and components of the experience can be addressed in a descriptive and analytical manner.
In the end there will be several products: a timeline, perception of the achievements, successful and failed actions, lessons learned, recommendations, an analysis of alliances, impacts, and projections, among others.
How to decide which is the best approach to use?

1. Combining tools is the best option: although the learning process favors collective thinking, during phase 2 of the learning process group exercises can be implemented together with individual interviews when necessary. We recommend giving priority to group exercises (workshops and focal groups) when combining tools, and that the total number of interviews does not exceed 10 or 12.

2. Not all actors are interested—or enjoy—participating in workshops, meetings, or other types of group exercises; some actors prefer an individual interview.
3 The availability of time and financial resources will determine in great measure to what extent the diverse approaches can be combined in phase 2. Interviews require fewer financial resources because not only can they be carried out face-to-face, but also virtually and through telephone calls. However, building collective reflections, which is essential for this approach, is sacrificed when the learning process is based mainly on individual interviews and a review of documents from the experience.

4 We have learned that it is highly effective to kick off phase 2 by carrying out an in-depth interview with someone who is well informed about the experience being analyzed. This way, the facilitation team has a general context and can identify those key issues that should be included in the group exercises and interviews with other actors.
Remember: the tools can always be adjusted when aspects of the experience that are worth reflecting upon emerge. It is part of the facilitation team's job to be watchful of what may arise and apply adaptive management without losing sight of what was established in the framing phase.

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

Now that we know more about the tools that can be used in phase 2 and the possibilities for their application, we are ready to go into detail on the basic and in-depth interviews, in the next document.
Concept and illustrations: Karen Behar for WWF Forest and Climate.

Design and layout: Mateo Guevara and Andrea Orozco for WWF Forest and Climate.

Texts and editing: Maria F. Jaramillo and Emelin Gasparri – WWF Forest and Climate.

www.panda.org/forestclimate

This document has been produced within the framework of the project ‘From REDD+ Agreements to REDD+ Results: Generating Results to Secure Consensus’ (2016-2020), a program supported by the Norwegian Agency for Development Cooperation and Norway’s International Climate and Forest Initiative.

2020