THE LEARNING PROCESS

8. Tools for Phase 4: Sharing, Communicating and Ownership
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.
PHASE 4: SHARING, COMMUNICATING AND OWNERSHIP

Remember that in Phase 4, the communications materials are produced and the mechanisms and channels to reach the audiences (internal and external) prioritized during the framing phase are prepared. This is also the phase to develop the ownership roadmap of the lessons learned with those interested in incorporating this knowledge in the institutional setting.

1. PRODUCTION OF COMMUNICATION MATERIALS

2. ROADMAP FOR VALIDATION AND OWNERSHIP OF LESSONS LEARNED

The results are shared with the selected audiences.
1. COMMUNICATIONS MATERIALS

Sharing the results of the learning process is a key step in bringing the learning cycle to a close. The reasons for sharing lessons learned, reflections and recommendations resulting from the learning process are diverse: for example, to inspire others, to make the experience visible among current or potential donors, to strengthen the learning culture among participating organizations, to provide input for decision-making on a given process, and to provide input for an evaluation, among others.
The communication of results must have a clearly defined objective from the outset, as well as predefined target audiences; this will determine the channels that must be used to reach the audiences and achieve what is desired through dissemination.

When we talk about communications materials, we are not necessarily referring to publications or videos, whose budgets are often beyond the reach of the learning process or that are created but not used for the expected purposes.

Sometimes, all that is required is to prepare a few slides, a short text, or a graph...
Additionally, ownership is especially important for the learning process; it entails building knowledge by incorporating lessons learned and recommendations in planning, monitoring, evaluation, and implementation processes, depending on the scope and level of the learning process.
Knowledge building can occur in any of the three levels of institutional learning: improving the practice, improving the goals and objectives, or rethinking the institutional mission.
ROADMAP FOR VALIDATION AND OWNERSHIP OF LESSONS

Not all audiences with whom we share the results of the learning process are of interest for the lessons learned ownership process. For those audiences with whom we are interested in moving towards the generation development of knowledge based on the lessons learned, recommendations and reflections, we have designed a roadmap that enables this journey, which we have called the "Roadmap for Validation and Ownership of Lessons Learned."

1. Selecting 5 lessons learned
2. Explaining the lessons learned
3. Identifying the usefulness of the lesson learned
4. How can we use this knowledge? (Define the incorporation roadmap)
This roadmap begins with a selection of some of the lessons learned gathered previously; four or five will be enough. For the exercise to work it is crucial that these lessons learned all correspond to the same topic—for example, lessons learned related to administrative matters, or policy advocacy issues. Once the lessons learned have been selected, a collective group exercise is convened: the participants in an “ownership workshop” must have three hours available and have specific interest in the topic that the lessons learned relate to.

The workshop begins with understanding and validating the meaning and context that gave rise to each lesson learned.
Then the participants determine if any of those lessons learned are useful in the short term and they finish by incorporating the lesson into some action or strategy in their work plan.

The ownership of lessons learned through their inclusion in institutional work is the ideal conclusion to the learning process. However, it is the step that deserves the most attention because, despite its apparent simplicity, it has turned out to be one of the greatest challenges in the learning process.

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

In the following document we will present a tool for technical teams to design their own simple communications strategy that will allow them not only to share the results of their learning processes, but also to improve their levels of technical or political advocacy with specific audiences.
APPENDIXES
If we do not apply, we do not learn

In carrying out our day-to-day activities in the field, a series of questions arise concerning how to resolve different situations that appear and that, in one way or another, are determining factors in achieving the success of our work. Providing answers to these questions as we go along has become a common denominator.

This is one of the reasons why the initiative to generate lessons learned based on those questions and answers has arisen. These lessons learned may be an advance response to a new process, which also helps the entire team optimize time, money and effort.

'Lessons learned' are conclusions that arise from the process of analyzing and reflecting on various scopes of institutional work. Lessons learned are the result of individual or collective reflection on a specific experience (it may be a project, a program, a long-term process, one-off intervention, etc.). Lessons learned are based on findings: issues we did not know before carrying out the experience or reflecting on it, or new views of issues we knew about.
The various teams in WWF and partner organizations have participated in a variety of reflective exercises (assessments, learning process exercises, monitoring visits), premeditatedly designed to generate lessons learned. These exercises have been recorded in writing, in documents that should be validated by the participating stakeholders both in the reflection exercise and in the experience that reflection concerns. What we have found regarding this is that, on the one hand, these documents are apparently not being appropriately disseminated since many stakeholders have complained that they do not have the documents resulting from exercises in which they have taken part. On the other hand, it is clearly not sufficient to provide the documents containing the reflections and lessons learned, since the teams rarely look back at them to review their usefulness and incorporate them in their work in a practical sense.

WWF has made significant process in defining and putting into practice methodologies and tools to analyze the various institutional experiences and generate lessons learned that could be useful within the framework of the organizational culture. However, it must make still further process in creating ownership and applying the lessons learned within its cycle of projects and programs. Only when this is achieved, can the organization say that the lessons learned are being converted into knowledge.
How can we convert lessons learned into knowledge?

The first premise is that just as valuable institutional lessons are generated through group exercises rather than individual ones, conversion into knowledge also occurs through a collective process. The roadmap set out below has been designed to aid this conversion.

Steps to convert a lesson learned into knowledge: ²

1. Explaining the lessons learned

2. Identifying their usefulness

3. How can we use this knowledge?

² María F Jaramillo. "Learning Processes and Lessons Learned: conceptual elements and basic methodological roadmap". WWF Forests and Climate Team. June 2015
Description of the exercise:

- **Name:** Roadmap for validation and ownership of lessons learned
- **Length:** 2 to 3 hours
- **Participants:** A maximum of 15 people, selected based on their connection with the topic of the lessons learned, which will be analyzed in this exercise.

**Procedure:**

*Before the workshop:* the facilitator, together with the person who wants their team to take part in the validation and ownership exercise, selects a maximum of 5 lessons learned that were previously identified in a learning process or during assessment or drafting of a report, etc.

**N.B.:** The person interested in their team performing the exercise to apply lessons learned must attend the workshop, supporting the facilitator when requested. It is particularly important for them to participate in clarifying the lesson learned and reiterating its usefulness for certain current or future processes. The facilitator must make sure that leadership does not "take control" of the workshop. It is suggested that the priority criteria for selecting the 5 lessons learned should be the relevance of the lessons learned to current action or action that will be performed in the near future.
Once the five lessons learned have been selected, the group of people to be invited to the workshop must be identified (a maximum of 15, as mentioned above).

The facilitator must verify that each of the 5 lessons learned is expressed completely and comprehensibly. This means that the lesson learned has: a title drawing attention to and stating the essence of the lesson learned; a paragraph explaining what the lesson learned consists of; a paragraph recounting an anecdote or the specific situation from which the lesson learned arose.

Once the lessons learned have been drawn up in the appropriate form, it is suggested to validate each of them with a person who is not connected to the exercise: does the wording of the lesson learned convey the message it is supposed to convey?

Prepare all of the necessary materials, as explained step by step below.

- During the workshop, if it is not virtual, make sure there is sufficient physical space for both exercises with the entire group and four rotating groups (chairs and desks that can be moved around the room). Walls, boards and flipcharts on which some of the elements required can be stuck.
The workshop begins with the entire group together. The facilitator guides the exercise through the questions stated below.

1) **Explaining the lesson learned:**
   I. **What was learned?:** it is recommended to do this individually for each lesson learned. The participants individually read out each lesson learned. They are asked what they understood. Depending on the answer, clarifications of each of the lessons learned are given if necessary. This step is essential to continue with the exercise.

2) **Identifying the usefulness of the lesson learned.**
   2.1. Does this lesson learned help us with current processes or future processes? Which ones?
   2.2. Why is this lesson learned useful? For example, what errors will we avoid by applying this lesson learned? Or what benefits will it provide? Will anything change in our institutional work if we incorporate this lesson learned?

This second part of the workshop is carried out in rotation (World Cafe). If it is not a virtual workshop, set up desks, one for each lesson learned. A recorder (preferably from the team supporting the facilitator, since this person does not rotate) sits at each desk. Each desk must have sufficient sheets of paper for the participants to write down their ideas and, on one sheet of paper, the lesson learned must be written in clear lettering. The facilitator must make sure the groups are made up in
such a way that everyone participates and learns from each other. At each of the desks, they answer the questions stated above. During the first round, each group rotates around each desk, reviewing what the previous group answered to the question previously stated, and answering the new question put by the facilitator. When the second round begins, and all of the lessons learned have been analyzed through the two questions, each group must carefully read all of the answers and complete, contradict or adjust them. Once the recording has been completed, the facilitator summarizes the core elements of the session.

3) **How can we use this knowledge?**

The participants, individually or as a group, must select one of the lessons learned that were analyzed in the previous step, which they consider particularly useful for a process or task they are currently tackling; then they must explain how they will incorporate that lesson learned into that process or task.

For that purpose, they must identify all of the actions they have to perform so that this lesson learned is immediately incorporated into their work. The facilitator gives the instructions: they must be two or three actions that can be performed in the short term, directly by the person participating in the workshop. And they must accompany this action roadmap with an explanation of the change that will arise from incorporating this lesson learned into their work.
Each person produces their incorporation roadmap and then it is opened up to the group as a whole. The person and mechanism used to monitor these commitments must be defined.

NB: we recommend the Planning & Monitoring team to monitor the achievement of the changes identified.
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