Practical guide

How to implement a continuous learning approach on HI projects and programs

Innovation, Impact & Information
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Women authors

Laëtitia Frémont - Continuous Learning Specialist; Stéphanie Massoni - Learning & Knowledge Management Specialist, MEAL Unit, Innovation, Impact & Information Division

Contributors

Lise Archambaud, Fabien Cassan, Chloé Charpentier, Wanja Manarin, Frédéric Séguret from the MEAL unit at head office; Florian Pujol - Manager of the Information Management unit at head office; Collins Tumuhairwe - MEAL Manager Wish2action; Pierrick Kervella - MEAL Manager Latin America; Rotsimandimby Nifaliana Rajaonarivelo - Learning Specialist Madagascar; Constance Wanert - MEAL and Communication Officer.

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Documentary file associated with this guide and its tools available here

See also the summary tool sheet: The learning approach at HI

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" HI aims to be a learning organisation, by encouraging mutual learning between HI teams, with its partners, and between the field and headquarters. This learning process allows HI to develop its intervention methodologies and to remain as close as possible to the needs, expectations and choices of the populations".

Extract from the Fundamental Principles
of HI's Project Quality Policy

About this guide...

Why this guide?

This practical guide aims to give operational declination to the fundamental principle of learning as defined in the Project Quality Policy (PQP)[1] of Humanity & Inclusion (HI):

- In the first part, it provides the HI continuous learning framework and common understanding;
- In the second part, the 6 stages of the learning process are detailed, and linked to tools to facilitate their implementation, as well as the monitoring of lessons learned;
- The third part deals with continuous learning at programme level.

The objectives of this guide are as follows:

- Understanding the continuous learning approach which, through regular analysis, enables knowledge to be generated from the experience of projects and programmes. This knowledge production helps HI to make decisions and improve the quality of its interventions, for the benefit of the populations we work with.
- Promoting regular and collective learning, highlighting the multiple points of view, expertise and experiences at work during a project (intervention team, partners and beneficiaries) in order to integrate the lessons learned into future practices.
- Enabling all project teams to design and implement a continuous learning plan.
- Understanding that the 6 stages of the learning process can be adapted at the level of a programme, unit or division, in the field or at head office, in all contexts of intervention.
- Promoting the use (through a document) and sharing of formalised knowledge (HI Library).

The first edition of this guide dates from 2020. It was designed on the basis of the experience of a number of programmes that had deployed learning dynamics between 2018 and 2020. The new edition of this guide considers the new learning experiences of the programmes over the last three years, in different contexts and on different scales. Not forgetting the changes brought about by the new Project Quality Policy (formerly PME)!

[1] Project Quality Policy and Quality Framework. HI, 2022, p. 4-5

Who is this guide for?

This guide is aimed at:

- Project managers who have to design the MEAL plan for their project, and therefore the associated learning plan.
- The MEAL teams, who support the project managers in the framing and methodological aspects of learning.
- Senior managers, who are responsible for ensuring that a learning dynamic is effectively put in place at programme level.
- Anyone wishing to set up a learning dynamic, or a learning activity designed to draw lessons from practice.

How to use this guide

The learning dynamic is conceived at the design stage of a project. It forms an integral part of the project's MEAL plan, the learning axes of which are set out in a learning plan that is regularly updated. You will therefore need to refer to this guide several times during the project to design and monitor the learning plan.

We recommend that you read this guide in its entirety for the first time. This will make it easier for you to find your way around its contents, so that it can support you effectively in your learning process.

It's always more tedious to deploy a methodology when it's your first time. The experience you gain from it will mean that you won't need to refer to this entire guide again for your next learning experience!

This guide is not...

- **New:** All the methodologies and tools mentioned in this guide are already known and used in most HI projects and programmes; The aim here is to propose an orchestration consistent with a continuous learning approach.
- **Intended for project teams only:** The 6 stages of the learning process and the related methodologies/tools can be transposed to a programme, a unit, a division or a "head office" project. This guide is therefore recommended for everyone, whatever their area of responsibility, and at every level of the organisation... as long as there is a willingness to learn from it!

Part 1 - Principles and benchmarks

1. Background

Learning at HI is not new. For 40 years, HI has been for example carrying out action-research or studies on the social representation of disability (Togo, Madagascar, etc.) to design interventions that are consistent with the context. HI also evaluates its projects at mid-term and/or at the end of the project to identify areas for improvement, and capitalises on its experiences to enable replication. **Learning lessons to design, improve or reproduce interventions is therefore already an integral part of HI's practices.**

Learning: All the processes designed to draw lessons that will be used in order to continuously improve the project interventions and programmes and/or the organization management. These processes include information gathering, analysis, and knowledge creation and sharing. Learning therefore deals with and impacts several levels.

The primary objective of a learning dynamic carried out by a project team–to be understood as consisting of HI staff and operational partners–is to improve interventions. However, taking care to formalise the lessons learned and disseminating them also enables replication, although there is always some adaptation to the context to be expected. The learning approach at HI is therefore intended to be inspiring and enriching for all the teams, and is therefore based on a complementary knowledge management approach, with in particular a document formalisation system (publications, lessons learned sheet, etc.) and availability in our HiLibrary documentary database.

Operationalising learning implies the ongoing implementation of activities to collect information and produce knowledge on a regular basis in order to improve the quality of HI actions over time, and not just at the end of the project. The aim of this guide is therefore to help teams reflect on all the learning opportunities that can be mobilised throughout the life of a project.

2. Texts of reference on learning

Learning from our actions is in line with the commitments and quality criteria of the Core Humanitarian Standard on Quality and Accountability[2] .

What commitment no. 7 of the Core Humanitarian Standard of Quality and Accountability says

"Commitment: Communities and people affected by crisis can expect delivery of improved assistance as organisations learn from experience and reflection.

Quality criterion: Humanitarian actors continuously learn and improve.

Key actions:

- Draw on lessons learnt and prior experience when designing programmes.
- Learn, innovate and implement changes on the basis of monitoring and evaluation, and feedback and complaints.
- Share learning and innovation internally, with communities and people affected by crisis, and with other stakeholders.

Organisational responsibilities:

- Evaluation and learning policies are in place and means are available to learn from experience and improve practices.
- Mechanisms exist to record knowledge and experience, and make it accessible throughout the organisation.
- The organisation contributes to learning and innovation in humanitarian response amongst peers and within the sector".

This humanitarian commitment is reflected in HI's PQP[3], in particular:

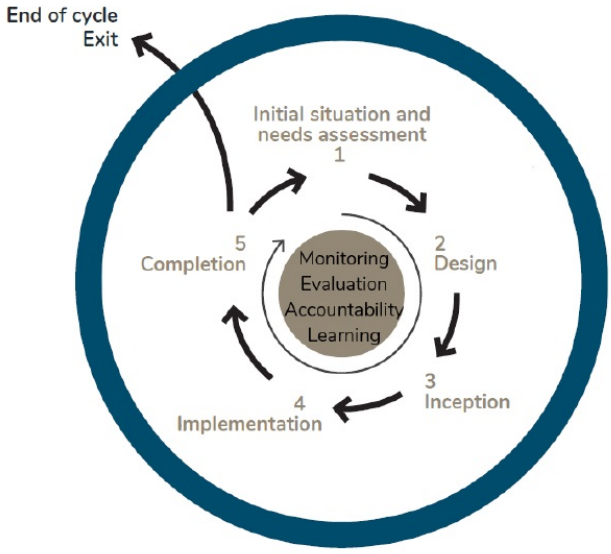
- Through the presence of learning as a **fundamental principle of the PQP** (in the same way as the principles of Ethics and Accountability): "HI aims to be a learning organisation, by encouraging mutual learning between HI teams, with its partners, and between the field and headquarters. This learning process allows HI to develop its intervention methodologies and to remain as close as possible to the needs, expectations and choices of the populations. The learning and knowledge management process is central to the continuous improvement of the organisation's actions and should be an integral part of

[2] CHS Alliance, Group URD and the Sphere Project. Core Humanitarian Standard on Quality and Accountability. 2014

[3] Project Quality Policy and Quality Framework. HI, 2022, p. 5

project cycle management, regardless of the length of the project. The learning principle of this policy is thus intended to contribute to the continuous improvement of interventions, by promoting the creation and sharing of knowledge, feedback and dissemination of results and lessons learned from our projects".

- Through HI's Project quality framework, and in particular the keyword **Lessons learned**: "The project learns from experience throughout the project cycle to continuously improve the intervention".
- As **one of HI's 6 key commitments**: "Every project must formalise and share the lessons learned in order to consider them in further interventions, but also to contribute to the overall learning dynamic of HI".
- Finally, as one of the 4 cross-cutting components of the five stages of the **project cycle**, along with monitoring, evaluation and accountability.



3. Transversal principles applied to learning

The key principles in learning dynamics are not new to HI either. In fact, some of them are taken from the PQP (in this case, mentioned with an asterisk).

3.1 Partnership = collaboration, involvement, relationship (*)

As part of the learning process, the presence of the operational partners is essential. As stakeholders in the projects, they must express their point of view in the same way as HI members. They must therefore be involved in defining the learning questions and in any exercise involving the documentation of practices. The notion of reciprocity is essential.

What the HI Project Quality Policy says

Partnership quality criterion: Operational partners are involved in each phase of the project cycle.

- ➔ **Collaboration keyword:** The project develops thoughtful, relevant and effective operational partnerships in a collaborative manner.
- ➔ **Involvement keyword:** Partners are regularly informed and actively involved in reasoned and transparent decision-making processes regarding the direction, implementation, achievement of objectives and success of the project.
- ➔ **Relationship keyword:** The relationship between the project partners is reciprocal, dynamic and controlled.

3.2 Accountability to populations = participation[4], expression, information (*)

The populations involved in our projects should not be considered as only beneficiaries of the interventions, but as actors and stakeholders in the projects.

They must be able to express themselves in a variety of ways, whether spontaneously (suggestion box, or via representatives of disabled people's organisations) or through surveys (satisfaction surveys, results monitoring surveys, *focus groups*, etc.). The information collected provides real added value for HI, which must take opinions into account in order to improve and continually adapt its interventions to the context. This is also an essential part of any learning process (among others!).

[4] "Participation in humanitarian action is understood as the involvement of affected populations in one or more phases of the project cycle: assessment, design, implementation, monitoring and evaluation. This involvement can take various forms... Much more than a set of tools, participation is first and foremost a state of mind, according to which members of affected populations are at the heart of humanitarian action, as social actors, with a point of view on their situation, and with their own skills, energy and ideas". (ALNAP and URD, 2003). See also HI's institutional directive: Ensuring the meaningful participation of populations and partners in our projects, 2023.

What the HI Project Quality Policy says

Accountability to populations quality criterion: The project has put in place mechanisms to involve the populations.

- ➔ **Information keyword:** The population is aware of HI's mandate and values, understands the objectives of the intervention, and is informed of the progress of activities and results throughout the project.
- ➔ **Expression keyword:** People have access to spaces or means of expression (satisfaction measurement, feedback mechanisms, etc.).
- ➔ **Participation keyword:** People are involved in the decision-making processes that affect them throughout the project cycle.

3.3 Ethics (*)

In the context of learning, ethics refers to the need to remain in touch with the realities of communities, and not to harm them. It also means managing data ethically, and protecting the personal data of the people involved in any survey.

How can we ensure ethical data management?

The ethical principles to be considered in data management (preparation, collection, processing, analysis and sharing of information) have been translated into ethical recommendations that can be applied to studies. The following recommendations are particularly relevant to learning:

- Ensuring the safety of participants, partners and teams.
- Ensuring a person/community-centred approach.
- Obtaining the free and informed consent of participants (see the adult and child consent forms (tools 4 & 5) in the guide How to conduct a qualitative/ quantitative study? From planning to using findings, HI, 2017).
- Proposing referencing mechanisms when HI is unable to meet the needs expressed.
- Ensuring the security of personal and sensitive data throughout the activity: see the practical guide How to integrate data protection within our operations, HI, 2021.
- Planning and guarantying the use and sharing of information.

➔ For more details, see the policy paper: Operational information management at HI, 2022

3.4 Disability, gender and age... & inclusion!

To consider age, gender and disability, think to diversify the profiles of the people giving their point of view. It is of course possible to go beyond these vulnerability factors[5], depending on the project concerned. HI's vision of inclusion is in its values charter and summarises all the principles set out above.

What the Values and principles charter & Scope of activity says[6]

Value No. 2, Inclusion: "We advocate inclusion and participation for everyone, upholding diversity, fairness and individual choices. We value difference. We defend equity, and diversity, antiracism, and gender-sensitive attitudes, we refute and combat discrimination, promote accessibility for all, encourage listening, open-mindedness, working together".

4. Benchmarks

4.1 The learning landscape at project level

A project takes place in a defined context, a geographical area and a timeframe[7]. It requires a budget and the definition of its own objectives, which are broken down into activities and measurement indicators (logical framework or change-oriented approach). A project is also part of an operational strategy at the level of the programme, and one or more technical strategies. These strategies incorporate a vision and "macro" MEAL aspects, while the project implements a more "micro" MEAL plan: learning is therefore considered in these strategies. During the implementation of the project, activities lead to the production of knowledge, such as:

- The analysis of information from the various data collections, according to very specific objectives (e.g. measuring a result indicator).
- Information from the coordination mechanism (e.g. project review, steering committee).
- Milestones shared with all stakeholders: people involved, partners, donors (e.g. reports).
- Activities specifically dedicated to learning (e.g. research, outcomes measurement, capitalisation[8] from experience, lessons learned workshop, self-assessment exercise).

[5] Humanity & Inclusion's policy on Disability, Gender and Age, 2018, page 5

[6] Values and principles Charter & Scope of activity, HI, 2022

[7] See for more details: The concept of project for HI, 2019, updated in 2023

[8] The term "capitalisation" refers to the process defining an intervention method from a specific experience. In English the used term is lessons learning, but for the purposes of this guide, and to distinguish it from the other processes which also allow to draw lessons, the term capitalisation will also be used in English.

The MEAL diagnostic[9] mentions in criterion 6.2: "Each project has defined a learning plan (...)". Establishing a learning plan[10] at project level is in fact an integral part of the MEAL plan[11]. The objectives of the learning plan are:

- Get an overview of all the activities that produce knowledge.
- Planning and monitoring these activities on a regular, collective and ongoing basis.
- To improve the quality of the project and its interventions over time, on the basis of feedback gathered throughout the project cycle, and not just at the end of the project.
- Build a knowledge base on which to design and implement new projects.

4.2 Consistency with all elements of a project's MEAL plan

During the preparation phase of the learning plan, the project manager (PM) ensures that it is consistent with all the elements that make up the MEAL plan for his project, and in particular:

Project management:

- Project review workshops are held at least every 4 months.
- The MEAL team provides technical support to PM in preparing project review.
- Shared services (logistics, human resources, finance, security) and technical services take part in project reviews.
- The project partners work together regularly to steer the project (e.g. regular project steering committee).

Monitoring results and effects:

- The lessons learned from the implementation of monitoring activities are used as part of the learning process and the continuous improvement of interventions.
- At least one of the expected effects of the project must be measured. Entering an effect indicator should be seen as a learning opportunity and analysed accordingly.

Project evaluation:

- A self-assessment is carried out at least once a year for each project.
- An action plan for the coming period is drawn up on the basis of the self-assessment.
- The results of the self-evaluation will inform the terms of reference for the mid-term and final evaluations.
- A mid-term evaluation (internal or external) is systematically carried out for all projects lasting 3 years or more.
- A final external evaluation is systematically carried out for all projects lasting at least 2 years and/or worth at least €3 million.

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[9] MEAL systems diagnostic tool, HI, 2019

[10] Learning plan

[11] Project MEAL Plan - Structuring all the MEAL elements required at project level

- An action plan is drawn up in response to the recommendations of the various types of evaluation, with a view to improving either the continuation of the project or the design and implementation of the next phase of the project (or a new project of the same type in another context).

Accountability:

- Lessons learnt are drawn from accountability mechanisms and feedback & complaints from local people, and are used to readjust ongoing actions and projects.

Information Management (IM):

- Data from different sources (internal and external) is analysed, consolidated and shared to support decision-making.

Knowledge management:

- The "From project" format of HI's publication series is used by the programme to share technical and operational experiences that are relevant to all HI programmes.
- Reference documents produced by the programme (evaluation report, learning document, study/research, etc.) are shared in HILibrary.

4.3 Learning at programme level

Based on the various lessons learnt from the projects, the programme can carry out a cross-analysis, particularly of the issues common to the various projects. These may include issues relating to partnership relations, for example, or issues raised through the feedback and complaints system. At the same time, the programme also defines a certain number of learning questions (linked to the Operational Strategy, for example) for which a suitable methodology will have to be chosen to document them. This may involve, for example, analysing the programme's sensitivity to disability, age and gender. In all cases, the recommendations drawn up following the various learning activities should be compiled in a logbook so that their implementation can be monitored at programme level.

4.4 Roles and responsibilities (ARCI)

As head of a team of specialists (Technical Field Specialist, Business Developer, MEAL, etc.), **the Technical Head of Programme (THoP)** is responsible for ensuring that learning systems are effectively implemented at programme level.

The MEAL manager, or by delegation the **Learning Specialist,** is responsible for:

- The implementation and coherence of learning systems across the programme.
- Supporting all learning activities, particularly those linked to the programme's operational strategy or to the MEAL systems in place, to continuously improve them.
- Enhancing the learning capabilities of the MEAL & Projects teams.
- Supporting projects in designing and monitoring learning plans, implementing activities and formalising and using lessons learned.

- Analysis of the knowledge produced by the various projects to support decision-making and improvement actions at programme level, particularly on themes common to all projects.
- Dissemination and availability at programme level and whole HI of the formalised learning elements.

The project manager (PM) is responsible for:

- Designing and monitoring the learning plan[12] .
- The implementation of the learning activities themselves.
- Formalising and sharing lessons learned.
- Follow-up on recommendations arising from learning activities.

In particular, the PM will rely on the MEAL Manager/Learning Specialist or the MEAL Officer for effective implementation of some of these activities.

The MEAL officer contributes to these activities by providing the project manager with methodological support and scoping tools. He or she will also be involved in collecting and analysing the information gathered as part of the learning activities, in order to transform it into knowledge that can be used to make decisions and improve the project's interventions.

The contributors, i.e. all the actors involved in implementing the project, such as **the project teams, technical specialists, partners and the populations (DPOs or representatives of disabled people)** take part in the continuous learning activities and are the recipients of the learning results.

➔ **To find out more**, click here:

- See the ARCIs for the MEAL / IM & Project Management processes
- See the standard job descriptions for the MEAL/IM professions

4.5 Use of lessons learned

This is the ultimate goal of any learning exercise: the lessons we learn from the knowledge we produce must be put to good use! In other words, they have to be reinjected into practices, programming, decision-making, etc. Lessons are not drawn "just because we have to learn": they contribute to the professional development of the teams, enable them to analyse their practices, become aware of what has been put in place and compare points of view (on experiences, differences in perception, etc.) based on the same situation.

The diagram below illustrates how the use of lessons learned has an impact at several levels, through learning loops (or the "snowball effect").

[12] In practice, the design and monitoring of the learning plan are joint actions between the project team and the MEAL team at specific meetings (e.g. learning committee).

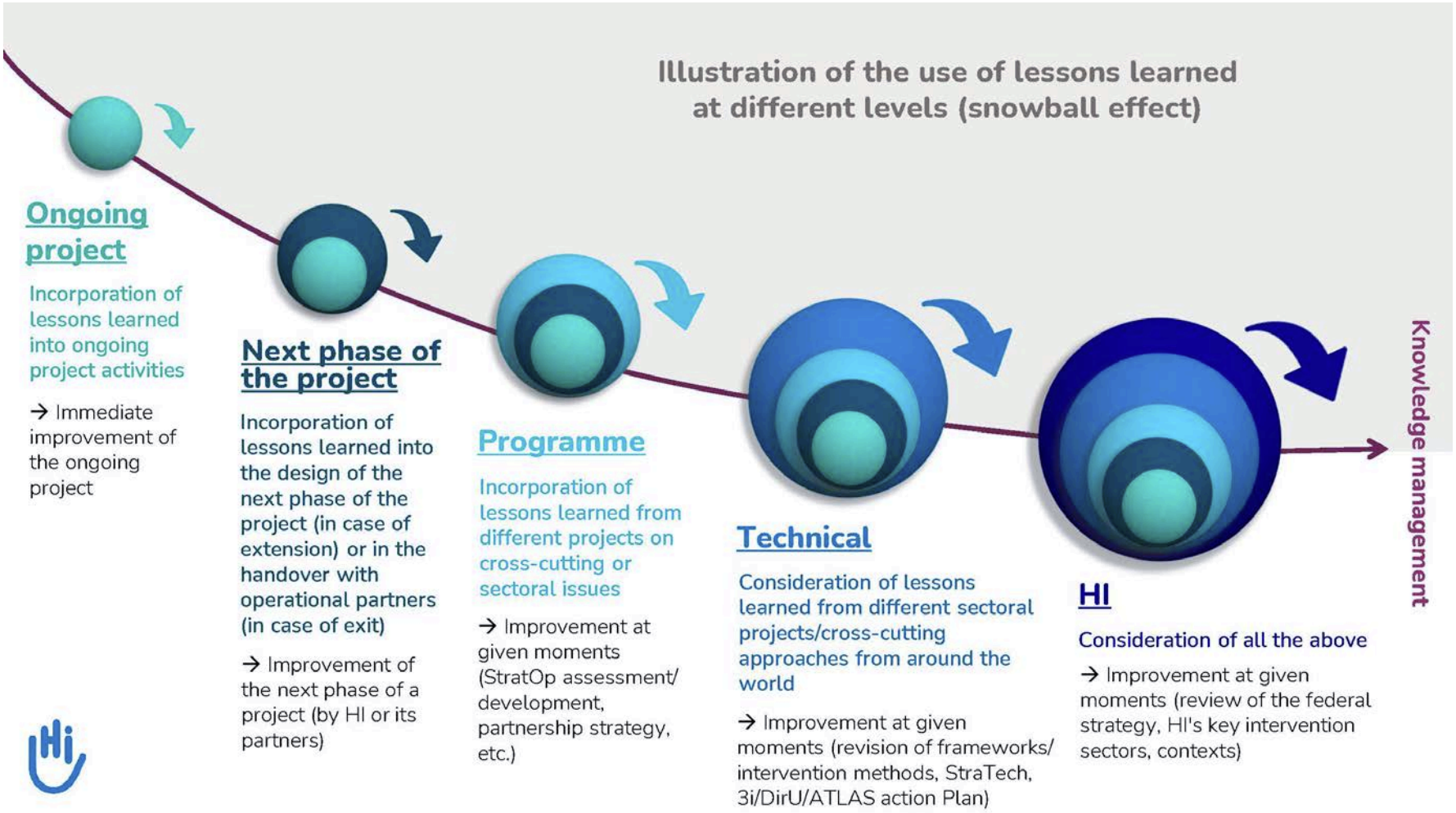


Illustration of the use of lessons learned at different levels (snowball effect)
Ongoing project
Incorporation of lessons learned into ongoing project activities
→ Immediate improvement of the ongoing project
Next phase of the project
Incorporation of lessons learned into the design of the next phase of the project (in case of extension) or in the handover with operational partners (in case of exit)
→ Improvement of the next phase of a project (by HI or its partners)
Programme
Incorporation of lessons learned from different projects on cross-cutting or sectoral issues
→ Improvement at given moments (StratOp assessment/ development, partnership strategy, etc.)
Technical
Consideration of lessons learned from different sectoral projects/cross-cutting approaches from around the world
→ Improvement at given moments (revision of frameworks/ intervention methods, StraTech, 3i/DirU/ATLAS action Plan)
HI
Consideration of all the above
→ Improvement at given moments (review of the federal strategy, HI's key intervention sectors, contexts)
Knowledge management

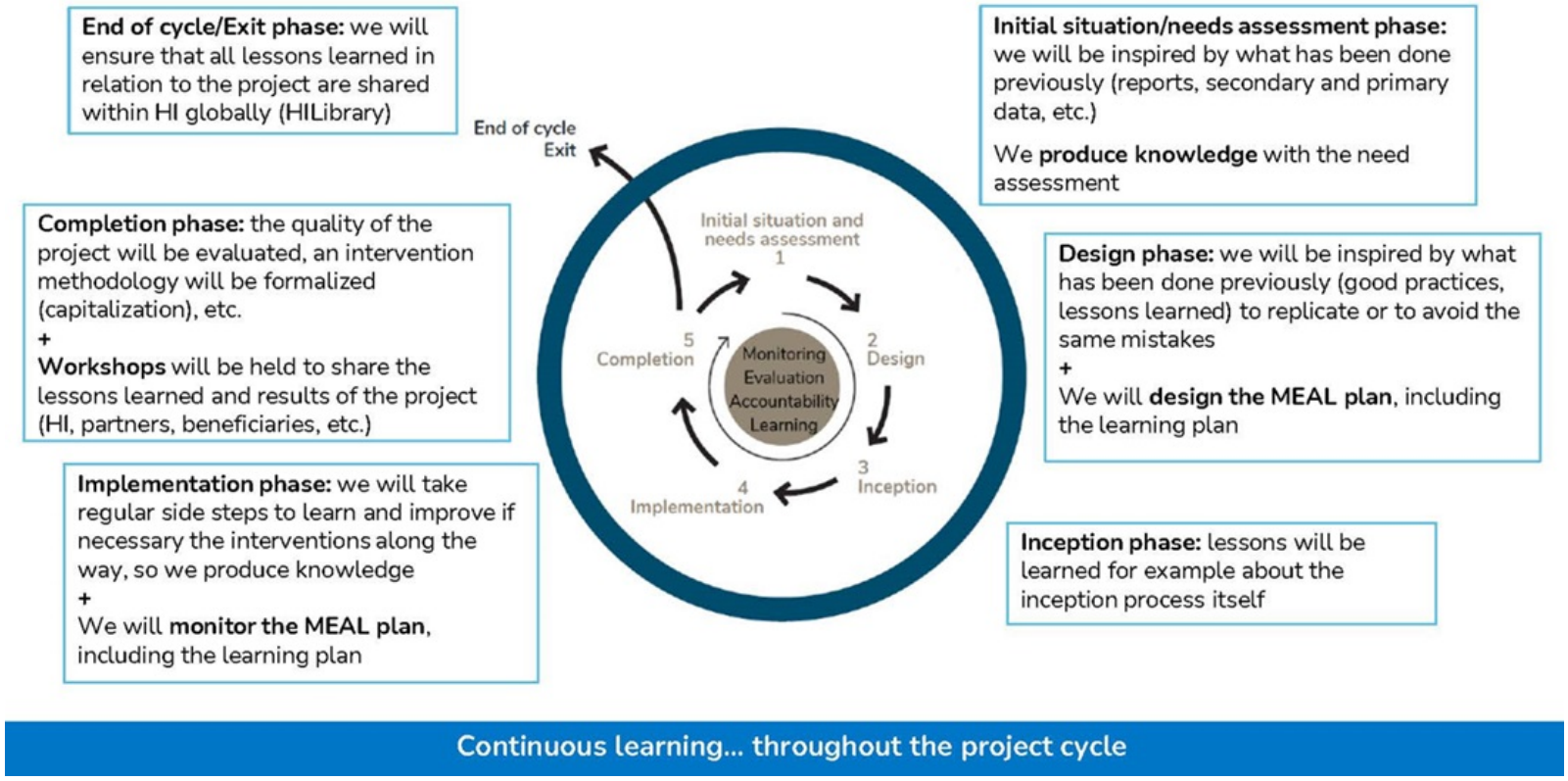
In a nutshell

- The notion of continuous learning implies the implementation of dedicated activities throughout the project cycle.
- It applies to all areas, contexts, practices, activities and sectors.
- It concerns all the target audiences: the populations involved, project teams, partners and donors.
- It contributes to the decision-making process that enables action to be taken to continuously improve the quality of interventions.
- It helps to give meaning to our actions, and to nurture our commitment to the communities we work with.

Part 2 - Implementation guide

Introduction - Continuous learning at every stage of the project: really?

You probably think that learning only concerns the implementation phase of a project? Or perhaps you're even one of the "naysayers" who think that learning only takes place at the end of the project? Well, no! The learning process is present at every phase of the project, as illustrated in the diagram below.



1. In the project diagnosis, design and inception phases

1.1 Building on what has already been achieved

First and foremost, it is important to have a detailed knowledge of the programme, the project and the sector concerned in the same type of intervention context, and therefore to carry out a review of the existing literature. The aim is to draw inspiration from what has already been done in order to prepare the project as well as possible, to avoid making the same mistakes again, and therefore to build on what has already worked. So:

Questions to ask yourself:

- Have the experiences of the previous phase of the project been formalised (videos, publications, etc.)? If so, where can they be found?
- What do the recommendations from previous evaluations, research, capitalisation and lessons learned workshops carried out during the previous phase of the project say?
- Are there any similar experiences in the same sector which, although they took place in a different context, could inspire the forthcoming project?
- Are there any key documents from head office or partners that could help frame and/or implement the project?
- What are the main objectives of the project?
- What activities are developed within the logical framework?
- What are the main milestones in the change-oriented approach?

What to look for?

- Operational strategy for the zone,
- Technical strategy(ies) for the intervention sectors mobilised in the area,
- Logbook of lessons learned at programme level,
- Capitalisation and/or evaluation reports,
- Research, study and survey reports,
- Sector-specific policy papers and practical guides,
- Matrices of standard and sector outcomes indicators[13]; catalogues of indicators[14],
- Logical framework and/or change-oriented approach which sets out the framework for the implementation of the project,
- Reports for donors,
- Handover documents from teams previously involved in the project.

[13] Hinside page on Outcomes measurement, Outcomes indicators tab

[14] Catalogues of indicators in development and emergency contexts

Where?

- The HI PSquare project database to identify similar projects and then search in HI Library via the project code,
- Directly in HI Library, HI's database of reference documents, which can be searched by country or sector of intervention,
- In the Hinside space of the programme to which the project belongs,
- In the documentary management system in place at project/programme level (Teams, Sharepoint, etc.),
- With project and/or programme teams,
- With the technical and MEAL teams.

HI Library, documentary database

Since 2018, HI Library has been the system for uploading and sharing all HI reference documents. The reference documents that contribute to collective learning identified at project level include:

- Evaluation reports,
- Feedback and best practice,
- Any publication published in HI's professional collections related to the project (study & research, practical guide, etc.),
- Learning plans.

When?

Ideally, this literature review should be carried out as early as the project design phase; in any case, as close as possible to the project inception and implementation phases.

1.2 Managing continuous learning at project level

There are two coordination and steering mechanisms available to the project manager for designing and monitoring learning at project level.

1.2.1 Integrating existing project steering mechanisms

The project manager may choose to take advantage of existing coordination mechanisms to dedicate specific time to continuous learning.

Advantages: simplifies planning and allows to involve all the project implementation stakeholders which will enrich the collective reflection by taking advantage of a plurality of viewpoints; encourages the appropriation of learning as a cross-cutting component integrated into the five phases of the project cycle.

Disadvantages: depending on the number of contributors, this type of coordination mechanism may prove difficult to maintain over time, and the time devoted to learning may be dissolved in favour of other subjects to be discussed in these steering bodies.

Examples: project steering committee, project review, monitoring meeting, etc.

1.2.2 Create a committee specifically dedicated to learning

The project manager may choose to set up a committee specifically dedicated to learning, in addition to the other mechanisms for coordinating and steering the project.

Advantages: reduces the number of participants on the committee (although care must be taken to ensure a plurality of viewpoints); avoids the risk of learning being "diluted" by other project-related subjects; makes it easier to monitor the implementation of learning activities, particularly in multi-country projects.

Disadvantages: requires a great deal of planning and can involve risks of "abandonment" along the way, with the (erroneous!) perception that this dedicated time is "optional", since it is outside the project's coordination and steering mechanisms.

Example of the composition of a learning committee:

- For a national project: the project manager, the operational manager, the MEAL manager or *officer*, the learning specialist, the THoP and the technical specialist(s).
- For a regional / multi-country project: the project manager for each country, the THOP, the operational manager, the learning specialist and the MEAL Country for each country or the MEAL manager.

➔ See **Tool 1:** Terms of reference for the Wish2action learning committee & **Tool 2**: Wish2Action learning strategy (examples)

And why not combine the two types of mechanism?

It is in fact possible to create a specific committee for the stages ranging from defining the learning questions to planning the learning activities; then to integrate the existing coordination and steering mechanism for the stages ranging from monitoring the implementation of the learning activities to the valorisation of the formalised knowledge. This configuration makes it possible to devote the necessary time to framing the project's learning, and then to monitor this framing by integrating the project's existing monitoring system.

1.3 Designing the MEAL plan... and a draft learning plan!

The project design phase is also an opportunity to draw up the **MEAL plan**[15] in order to build a vision of the constituent elements of the MEAL which will accompany the implementation of the project in particular. The MEAL plan sets out the broad guidelines for learning. Some of the project's learning themes are established during the **project design** phase.

In all cases, the learning elements defined in the MEAL plan are included in a draft **learning plan**[16] during the project design phase, and are supplemented by the learning methods and activities identified. The planning elements are then added during the project inception phase. The main purpose of the learning plan, at this stage of the project, is therefore to **prepare and plan for the learning opportunities**[17] that appear to be inherent in the project by filling in all the categories, which will be specified/updated during the implementation of the project.

The learning plan is not set in stone and is therefore regularly supplemented to **monitor** it and to **add any other learning themes** identified during the implementation of the project.

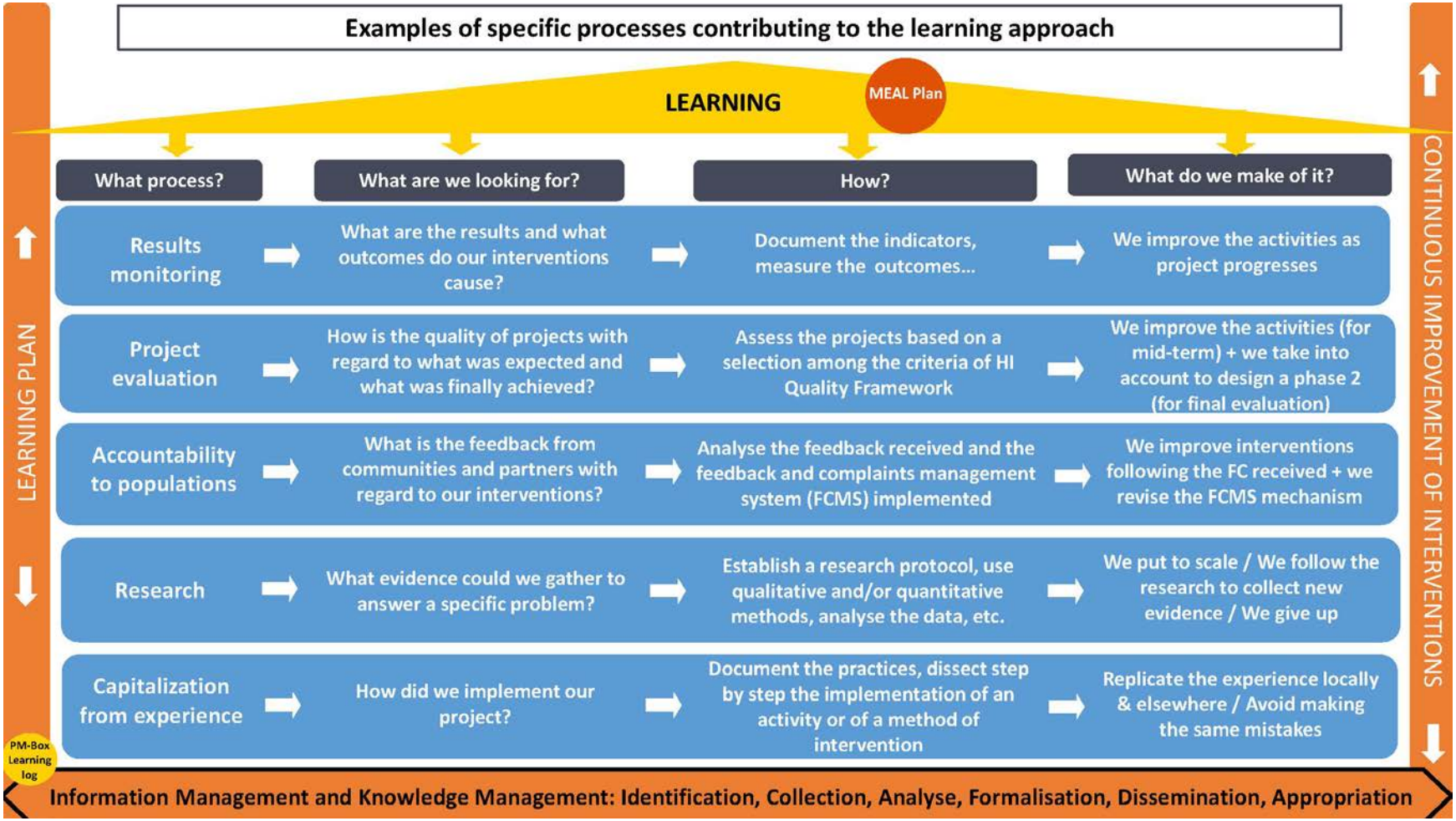
The learning plan is the tool used to **design and plan the 6 stages of the learning process as soon as the project is conceived**. From stage 3 of the process, when the learning activities are implemented, the learning plan is **monitored and regularly updated** in the various pre-filled fields. Any other learning themes that arise during the implementation of the project will also be added.

The diagram below illustrates what can be learned from several processes (results monitoring, project evaluation, research, accountability to local communities, capitalisation from experience).

[15] Project MEAL Plan - structuring all the MEAL elements required at project level

[16] Empty learning plan / Example of a completed learning plan

[17] Sub-sections 2.1 Identifying topics, learning questions and objectives and 2.2 Choosing relevant methodologies - although positioned in the Project Implementation section - may also be useful to you at this stage of designing the learning plan.


Examples of specific processes contributing to the learning approach
LEARNING
MEAL Plan
What process?
What are we looking for?
How?
What do we make of it?
Results monitoring
What are the results and what outcomes do our interventions cause?
Document the indicators, measure the outcomes...
We improve the activities as project progresses
Project evaluation
How is the quality of projects with regard to what was expected and what was finally achieved?
Assess the projects based on a selection among the criteria of HI Quality Framework
We improve the activities (for mid-term) + we take into account to design a phase 2 (for final evaluation)
Accountability to populations
What is the feedback from communities and partners with regard to our interventions?
Analyse the feedback received and the feedback and complaints management system (FCMS) implemented
We improve interventions following the FC received + we revise the FCMS mechanism
Research
What evidence could we gather to answer a specific problem?
Establish a research protocol, use qualitative and/or quantitative methods, analyse the data, etc.
We put to scale / We follow the research to collect new evidence / We give up
Capitalization from experience
How did we implement our project?
Document the practices, dissect step by step the implementation of an activity or of a method of intervention
Replicate the experience locally & elsewhere / Avoid making the same mistakes
LEARNING PLAN
CONTINUOUS IMPROVEMENT OF INTERVENTIONS
PM-Box Learning log
Information Management and Knowledge Management: Identification, Collection, Analyse, Formalisation, Dissemination, Appropriation

1.4 Preparing document management and collaborative working systems

This type of system cannot be improvised! You need to prepare it so that it's up and running quickly!

Questions to ask yourself:

- What document management system is used for the project?
- Who shares what and where (roles and responsibilities)?

Recommendations:

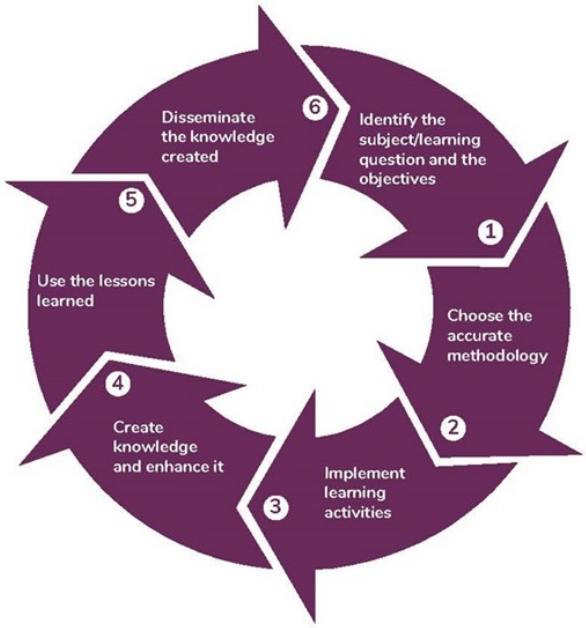
- For **draft documents** from learning activities: use the programme's document management system, such as **Teams/OneDrive/Sharepoint, to facilitate collaborative working in particular**.
- For documents resulting from activities in their **final version** (analysis, format of professional publications, reports): **Hinside** programme/technical space or HI-L to host the documents themselves + **HI Library** document file to reference the documents (title, author, technical sector concerned, type of document, etc.).
- To prepare the archiving system, refer to the Archiving and records management directive.

To help you find your way around the use and best practices associated with HI's various collaborative tools, but also to share project documents:

- ➔ See **Tool sheet:** Project document management: Digital version - from their creation to the consolidation of the final version, 2022
- ➔ See **Tool sheet:** Why and how to use HILibrary? 2022
- ➔ See **Hinside article**: HI collaborative tools: which ones to use, for which needs? 2021

2. During the project implementation phase

At a glance: The 6 stages of the learning process



How much time do you need to mobilise from stages 1 to 6?

Project manager (+ contributors depending on the coordination mechanism chosen):

- 1 half-day dedicated to defining the learning themes/questions, the methodologies for documenting them and planning the learning activities.
- To monitor learning activities, schedule quarterly steering meetings at least 2 hours.
- Allow 4-5 working days to transform the data into information and then knowledge.

MEAL:

- Set aside 2 hours a month to analyse the knowledge gathered and cross-referenced, in particular information from accountability mechanisms, implementation and results monitoring, outcomes measurement, project evaluation and partnership relations.
- Devote around 2 hours a month to monitor the implementation of the learning plan (as a contributor and depending on the coordination mechanism chosen).

2.1 Identify topics, learning questions and objectives

➔ **What do we want to learn and potentially improve? Why? And for whom?**

At this stage, a preliminary analysis of existing knowledge has been carried out and is therefore available; the mechanism for coordinating and steering learning has been chosen; the document management and collaborative working system is in place; and a draft learning plan exists, which is therefore derived from the MEAL plan.

What to do?

At this point, the coordination and steering committee meets to consolidate the learning questions and objectives, and make a final decision on the specific processes to be mobilised. At this stage, the learning plan is stabilised, and any previously forgotten learning themes are added.

How do we do it?

By brainstorming[18] as a team, the aim is to **identify relevant learning themes that may have been omitted**, with the help in particular of:

- The donor's contract: are there any contractual obligations on the part of the donor about learning?
- The project's logical framework: what are the project's activities/high points? Where are the learning opportunities?
- Change-oriented approach: if the project is part of a change-oriented approach (theory of change), what are the relevant change paths/steps for generating collective learning?
- Analysis of the documents gathered during the project preparation phase: are there any gaps in knowledge on the subject? Can this knowledge gap be filled by implementing specific learning activities?
- Cross-disciplinary approaches: does the project enable knowledge to be generated in relation to the implementation of one or more cross-disciplinary approaches (Disability-Gender-Age, Vulnerability, Conflict sensitivity, Operational partnership, etc.).
- The quality framework: what criteria and/or associated keywords are essential in the context of the project? Can they help to define one or more learning themes relevant to the project?

The next step is to **turn these themes into learning questions -** as well as those already identified - in order to find answers.

[18] Different types of brainstorming are suggested in the Unicef guide: Knowledge exchange toolbox: Group methods for sharing, discovery and co-creation, 2015, 2022.

From subject to more specific learning question

1. **Identify the subject** you want to learn about: for example, the system for strengthening national mental health strategies that you are going to implement.
   - ➔ We would like to formalise this experience to facilitate replication elsewhere, as there is a knowledge gap in HI on this subject.
2. **Turn the subject into a learning question**: for example, what are the key steps that will enable the project to strengthen national mental health strategies?
   - ➔ To enable other projects to replicate the experience, the intervention will have to be deconstructed to identify the stages involved.
3. Depending on what we are trying to document and formalise, we can **transform the overall learning question into an evaluative question, a capitalisation question, a research question,** etc. To continue with this example, we would end up with a capitalisation question: How will the project enable national mental health strategies to be strengthened?
   - ➔ This question will guide the search for answers towards the formalisation of an intervention methodology.

The next step is to review the following questions in order to **determine who and what the formalised knowledge will be used for**:

- Who will benefit of the lessons learned?
- What kind of improvements could this knowledge contribute to?

It is the association of the learning questions with the objectives and the target audience for the lessons learned that then makes it possible to choose **which specific learning process** is the most appropriate and relevant to answer them:

- ➔ Capitalisation from experience process
- ➔ Results monitoring process
- ➔ Outcomes measurement process
- ➔ Evaluation process
- ➔ Process for implementing the system and handling feedbacks and complaints
- ➔ Research and studies process

Inclusive health project: learning questions, objectives & methodologies

Example 1:

- **Learning question:** What are the practices of health services in relation to disability?
- **Objective:** To obtain a snapshot of practices at a given point in time in order to define a strategy for strengthening healthcare providers in terms of inclusion.
- **Methodology:** KAP (Knowledge, Attitudes, Practices) survey before the start of activities.

Example 2:

- **Learning question:** What are the successes and difficulties encountered in the inclusion training provided to a given health service?
- **Objective:** To identify potential areas for improvement, in order to adjust the training if necessary before delivering it to another health service.
- **Methodology:** Review after action to identify what worked well, what didn't work so well and what can be improved for next training.

For how long?

Half a day.

How many topics/questions?

Between 10 & 15 questions. Beyond that, implementing the learning activities associated with these questions becomes complex, and potentially burdensome in terms of monitoring and analysis (time/mobilisation of resources).

In a nutshell

During this **1st stage of the learning process**, teams:

- Define learning opportunities in relation to the project, particularly if there is a knowledge gap to be filled.
- Define objectives and turn learning areas into learning questions.
- Select the specific processes to be used (capitalisation, project evaluation, action research, results monitoring, etc.).
- Define the type of improvement to which this knowledge will contribute.

➔ Using the elements formalised in step 1, update **column A** (learning topic), **column B** (learning question), **column C** (rationale/why?) & **column D** (target audience/for whom?) of the learning plan.

2.2 Choose the accurate methodologies

What to do?

The coordination and steering committee meets again (or as a continuation of the same scoping meeting from the previous stage) to choose the relevant methodologies to document each learning question.

How do we do it?

Consider which methodology would be the most appropriate to answer the defined learning question. This is done by collectively reviewing the table of methodologies below, and requesting specific support from the MEAL, which will provide its technical expertise, particularly in terms of knowledge of each of the methodologies. This stage also makes it possible to define who will be responsible for implementing the learning activity, who will be a contributor and, finally, how long the activity is expected to take.

Caution

The **knowledge gained from existing feedback systems on the project,** such as accountability mechanisms, implementation monitoring, results monitoring, analysis of partnership relations, etc., may be sufficient to collect the information required for certain learning questions; in this case, it is not necessary to add a specific learning activity. On the other hand, it is still necessary to inform the learning plan about these learning questions and the sources to be used, so as not to forget the analysis that will have to be carried out!

List of methodologies/tools for a learning approach

Methodology/tools	For questions relating to:
➔ Inter-service project review ➔ Project health check	**Steering and optimising** the project, and in particular coordinating all the stakeholders and departments involved
➔ Resources and practical guidance for Outcomes measurement ➔ "Making it work" methodology: Good practices for disability-inclusive development and humanitarian action ➔ Good practices collection sheet ➔ Innovative practice collection form ➔ Life stories and case studies : The art and manner of collecting and writing life stories and case studies ➔ Interview template for success story (EAR Programme)	The **changes** to which the activities/project have contributed, and identification and documentation of good and/or innovative practices **Caution:** It may be necessary to compare the situation before and after the intervention
➔ Methodologies associated with participatory approaches	**Involving** local people in implementing the project cycle
➔ Analysis phase of feedback and complaints received, and process for implementing a feedback and complaints management system	The relevance and **quality of the feedback and complaints management mechanism**
➔ Evaluative process and associated toolbox ➔ Self-assessment	HI**'s quality framework**
➔ After-action review ➔ Writing workshop: a reciprocal & group learning tool ➔ Bad practice collection form ➔ Learning paper ➔ In-depth capitalisation process, in Learning lessons from experience	The project implementation **experience** of the operational and technical teams, as well as of the partners, donors and local people involved

Caution

The **methodologies/tools chosen can be complementary**. For example, for questions relating to feedback from operational and technical teams in the implementation of a project activity, you can use:

- The learning paper which, among other things, helps to identify good practice.
- Then the good practice collection sheet to document the practices identified.

Another example: as part of a recurring activity, such as a distribution for example, it is possible to use the **After-Action Review** tool after each distribution activity, to define what worked well, what did not work so well and what can be improved for the next distribution. At the end of the project, all the after-action review sheets produced after each distribution will be analysed to define an intervention methodology that takes into account the improvements made to the distributions during the project, so that they can be shared with HI as a whole.

This stage also involves asking the following questions to **determine:**

1. **Information sources**: Who has knowledge relating to the learning question? Who should be mobilised: HI team, populations, partners, authorities, donors?
2. **How will the information be collected from these sources:** workshop, focus group, individual interview, online survey, etc.?
3. **The person responsible for and the contributors** to the implementation of the activity,
4. The planned **duration** of the activity.

It will therefore be necessary to **mobilise methodologies** such as the design of an individual or group (*focus group*) interview guide, administration of the questionnaire via paper, tablet or telephone, focus group transcription, etc. Here is a list of useful resources related to these elements, so that you **can be well prepared before implementing the learning activities**:

- E-learning The fundamentals of data management
- E-learning Mobile data collection Survey CTO: Basics
- Data and information management Hinside space
- Tool sheet Prepare your mobile data collection
- Methodology guide: How to conduct a qualitative/quantitative study? From planning to using findings
- E-learning Planning and conducting focus group discussions: How to do it and be inclusive
- Tool sheet Finding your way through the tools for capitalisation from experience or the practical guide to capitalise on experience
- Project evaluation toolbox / E-learning HI's evaluation process
- E-learning How to integrate data protection into our operations

For how long?

To determine all these elements at this coordination and steering meeting, allow between 2 and 3 hours. Stage 1 and stage 2 of the learning process can be combined in the same coordination meeting. To prepare the data collection elements, allow around 2 days.

TMRD: Sharing the experience of teams in different countries

The *Touching Mind Raising Dignity* (TMRD) regional mental health project was deployed in 4 countries with literally different contexts (Lebanon, Madagascar, Sierra Leone and Togo), but which nevertheless carried out the same activities. The regional coordinator wanted to set up a regular learning system to enable the teams in the 4 countries to interact and learn from each other. A learning question was formulated for each of the project's expected results, and incorporated into an after-action review framework. The following process was put in place:

- A different learning question addressed each month.
- Each country team completed an after-action review (AAR) form for each country, based on its own experience.
- Bringing the 4 teams together for a remote meeting to present the elements formalised by each country team on the AAR, to discuss the successes and difficulties encountered by each according to the context of intervention, and then to consolidate together the areas for improvement for the continuation of the activities in relation to the expected result concerned.
- At the end of the project, all the after-action reviews were consolidated and shared at a capitalisation workshop with different audiences.
- The results have been published in the Lessons learned series.

➔ See HILibrary for the **terms of reference of the learning system** put in place, the **after-action reviews** by country and the final **publication**.

In a nutshell

During this **2nd stage of the learning process**, teams:

- Formalise the methodology and tools for documenting the learning question (workshop, focus group, individual interview, online survey, etc.),
- Define who can help document the learning question (HI team, partners, populations, etc.),
- Plan data collection activities (workshop, survey period, appointments, etc.).

➔ Using the elements formalised at this stage, update in particular **column E** (methodology and related activities), **column F** (source/with whom), **column G** (person responsible for implementing the activity), **column H** (contributors), **column I** (expected duration of the activities to be implemented) of the learning plan.

2.3 Implement learning activities

What to do?

As part of the implementation of learning activities, the project manager:

- Disseminates the learning plan to stakeholders and contributors,
- Organises a meeting to launch the learning plan (if all the stakeholders have not participated in the previous stages),
- Implements planned learning activities,
- Provides the deliverables associated with each activity, if available.

… while the MEAL Manager:

- Provides the necessary guidance for implementing learning activities,
- Shares the learning plan on HI Library,
- Provides information on the feedback system in place.

Two concrete experiences: Multi-country project and Latin America programme

Listen to[19] for feedback from Collins (Wish2Action MEAL Manager) and Pierrick (Latin America MEAL Manager) as they help project managers design and implement this step.

How do we do it?

By ensuring that the learning activities are integrated into the project implementation schedule, and that the stakeholders are informed of the learning plan and the related activities… which will mobilise them if necessary! And therefore: collect data using the tools designed in stage 2 of the learning process.

For how long?

- Plan to hold 2 one-hour meetings to monitor the implementation of the activities. Not forgetting the time to be devoted to the collection itself… which will depend on the learning activities (between 4 hours and… a few days!).

[19] MEAL conference 12 on continuous learning in 2020 (2nd part of ConfCall)

In a nutshell

During this **3rd stage of the learning process**, the teams collect the data themselves:

- Qualitative,
- Quantitative,
- Mixed.

➔ At this stage, update **column J** (current stage: planning, design/administration of questionnaires, data analysis, etc.), **column K** (activity implementation dates) and **column L** (associated templates) of the learning plan.

2.4 Create knowledge and enhance it

What to do?

This involves analysing the data collected to transform it into shareable knowledge, as well as choosing (if this has not already been done) the format in which the knowledge produced will be stored.

How do we do it?

Project manager/consultant & MEAL/IM team work hand in hand to analyse the data. You can call on various resources to carry out these analyses:

- Hinside Data and information management space: Analysis and visualisation tab
- E-learning Processing and analysing qualitative data
- Methodology guide: How to conduct a qualitative/quantitative study? From planning to using findings

In addition, frameworks exist to host and showcase formalised knowledge:

- Professional publications (frames available on request),
- Tool sheet Finding your way through the tools for capitalisation from experience: gateway to the tool templates,
- Project evaluation - Final report template (Valuing tab),
- ScoPeO - *Baseline* & endline report templates.

Support for valuing learning outcomes

- **Professional publications** (lessons learned, studies and research, practical guides, etc.): pre-structured Word files are available to help structure the content and format it at the same time,

- **Project evaluations / ScoPeO reports:** also pre-structured Word files,
- **Learning paper, collection forms for good practices, innovative practices, bad practices, after-action review**: pre-structured Word files that help both to guide the holding of a specific lessons-learned workshop, and to fill in the Word file live.

Analyse and document bad experiences!

As part of a project in Madagascar that had encountered several difficulties, the MEAL manager invited the project team to learn lessons to prevent such problems recurring in the future. Although the bad practice collection form was chosen first, the after action review (AAR) was finally used to reassure the team. The AAR makes it possible to document what was positive, then negative, and on this basis to establish areas for improvement. Being aware of the positive makes it easier to deal with the negative. However, the bad practice form could have been used at a later stage to dig deeper into the difficulties and their causes. The results of this workshop are available on Hi Library: Lessons learned from projects carried out with AXIAN on the development of public facilities (2023 – only in French).

For how long?

The time will depend on the amount of data to be analysed, and the format (long or short) in which the formalised knowledge will be contained (between 4 hours and… a few days!).

In a nutshell

During this **4th stage of the learning process**, the teams:

- Analyse the corpus of data and information collected
- Use an appropriate format as a repository for the knowledge produced: Publications, learning paper, after-action review sheet, best practice sheet, etc.

➔ At this stage, update **column M** (type of data analysis), **column N** (current stage of knowledge production) & **column O** (dates) of the learning plan.

2.5 Use the lessons learned

What to do?

As you know, the learning approach involves doing something with the knowledge produced[20] ! Producing it is not an end in itself: the aim is to use it in programming, to design project activities (following a CAP survey, for example) or to improve them (following recommendations made in a mid-term project evaluation or in a review-after action, for example).

How do we do it?

The most common methodology consists, for example, of translating recommendations into actions, within an action plan or the Recommendations tab of the PM-Box. In this way, the project manager **analyses the knowledge formalised at the end of each learning activity** and determines whether or not improvement actions are necessary and applicable (within his or her scope). If so, he or she must incorporate these actions into the programming, and in particular plan, monitor and implement the improvement actions. The continuous learning approach to quality improvement is thus established!

Examples of categories to structure the action plan

Recommendation made / Validation (or not) of the recommendation by the team / Need + validation of additional funding / Actions to be implemented / Responsible for implementation (organisations and people's functions) / Contributors / Deadline for implementation / Status of implementation (monitoring) / Comments/observations.

For how long?

To be determined according to the type of learning activities, their number, the associated deliverables and in line with the project activity implementation schedule. For the consolidated analyses for which the MEAL is responsible, the recommendation would be an overall analysis of the knowledge produced at project level per year of project implementation.

[20] Don't forget the diagram illustrating the use of lessons learned at different levels!

Practical experience: Promoting road safety in Benin

The Benin project team was asked to carry out a mid-term evaluation. Following this evaluation, the recommendations made by the evaluator were broken down into actions to be implemented by the end of the project. A comparative analysis of the mid-term evaluation (and its action plan) and the final evaluation highlighted the effective improvements made to enhance the project's results.

Do we still need to prove to you the value of the learning approach? If so, you can read the micro-learning based on this experience: The value of taking into account the recommendations made in a project evaluation to improve the continuation of interventions: The case of the Benin road safety project[21].

In a nutshell

During this **5th stage of the learning process**, the teams:

- Draw up an action plan based on the lessons learned and monitor its implementation
- Incorporate lessons learned into practices, programming, innovations, etc.

➔ At this stage, update **column P** (Recommendations at the end of the activity), **column Q** (Applicable recommendations (Y/N)), **column R** (Person responsible for implementing the recommendations), **column S** (Contributors), **column T** (Period for implementing the improvement action), **column U** (Existing action plan (Y/N)) of the learning plan.

➔ And don't forget the **RECOMMENDATIONS tab** of the **PM-Box**!

[21] See also page 41 for a diagram of the learning process put in place by the project.

2.6 Disseminate the knowledge produced

What to do?

Plan and implement activities to disseminate & facilitate appropriation of formalised knowledge.

How do we do it?

Here are a few examples of knowledge-sharing activities:

- MEAL Confcall,
- Dedicated sharing time in existing coordination mechanisms,
- Feedback seminar/workshop with target audiences,
- Documents available on Hinside/HiLibrary,
- Promotional article on Hinside (geographical division, technical division, etc.).

In this context, the project manager makes the deliverables available via the feedback system defined in the preparation phase, and the MEAL manager ensures that the deliverables are made available at the global HI level, based on the Why and how to use HI Library tool sheet.

In addition, to disseminate and facilitate the appropriation of the knowledge produced, refer to the following documents:

- Appropriation process poster (several formats to achieve different levels of appropriation)
- Profession sectors: How to facilitate professional communities tool sheet
- Guidance on information sharing and communication at project level tool sheet

---

In a nutshell

During this **6th and final stage of the learning process**, the teams:

- Make deliverables available on HI Library
- Write a promotional article on HInside
- Present new knowledge generated internally, via ConfCall, Talk, country/ programme coordination meetings, etc.
- Give feedback learning outcomes to partners & communities.

➔ At this stage, update **column V** (Deliverable(s) shared on HI Library / link to HI Library file) and **column W** (Knowledge dissemination and ownership activities + planned dates) of the learning plan.

3. At the end of the project

The MEAL officer **analyses the knowledge from all the learning activities** at project level, cross-checking them with the analysis of knowledge from:

- Accountability mechanisms
- Monitoring implementation
- Monitoring results
- Measuring outcomes
- Evaluation
- Partnership relations.

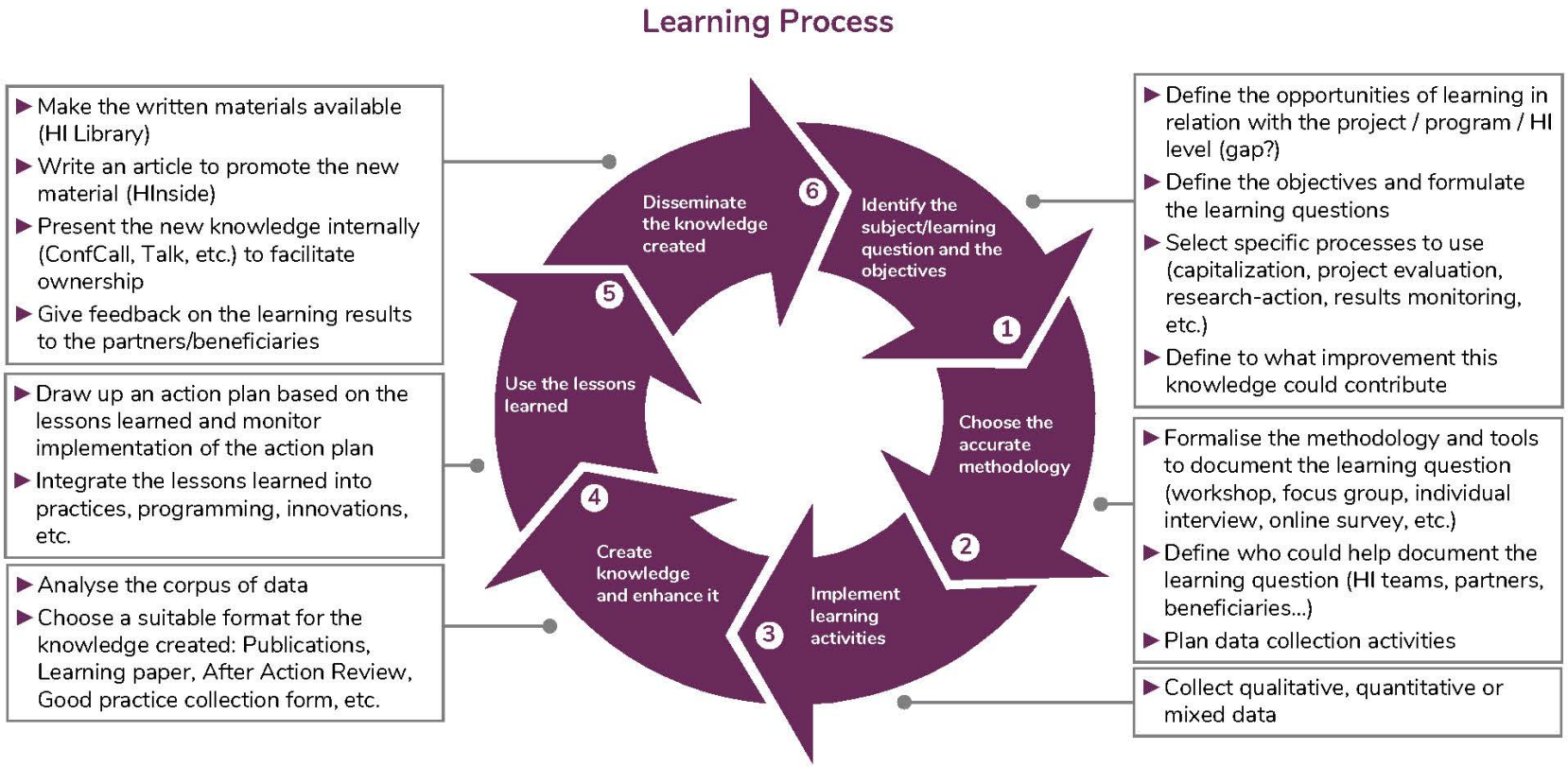
This combined analysis is then formalised and shared at programme level, as well as within HI as a whole (HInside/HI Library).

The MEAL Manager also ensures that all the deliverables are made available via a documentary file on HI Library, as well as the learning plan itself. If the project continues, the team will be able to re-use the knowledge produced to design the next phase of the project, as well as the new learning plan. And the body of formalised sectoral knowledge can be used by other HI teams working on the same sector elsewhere in the world.

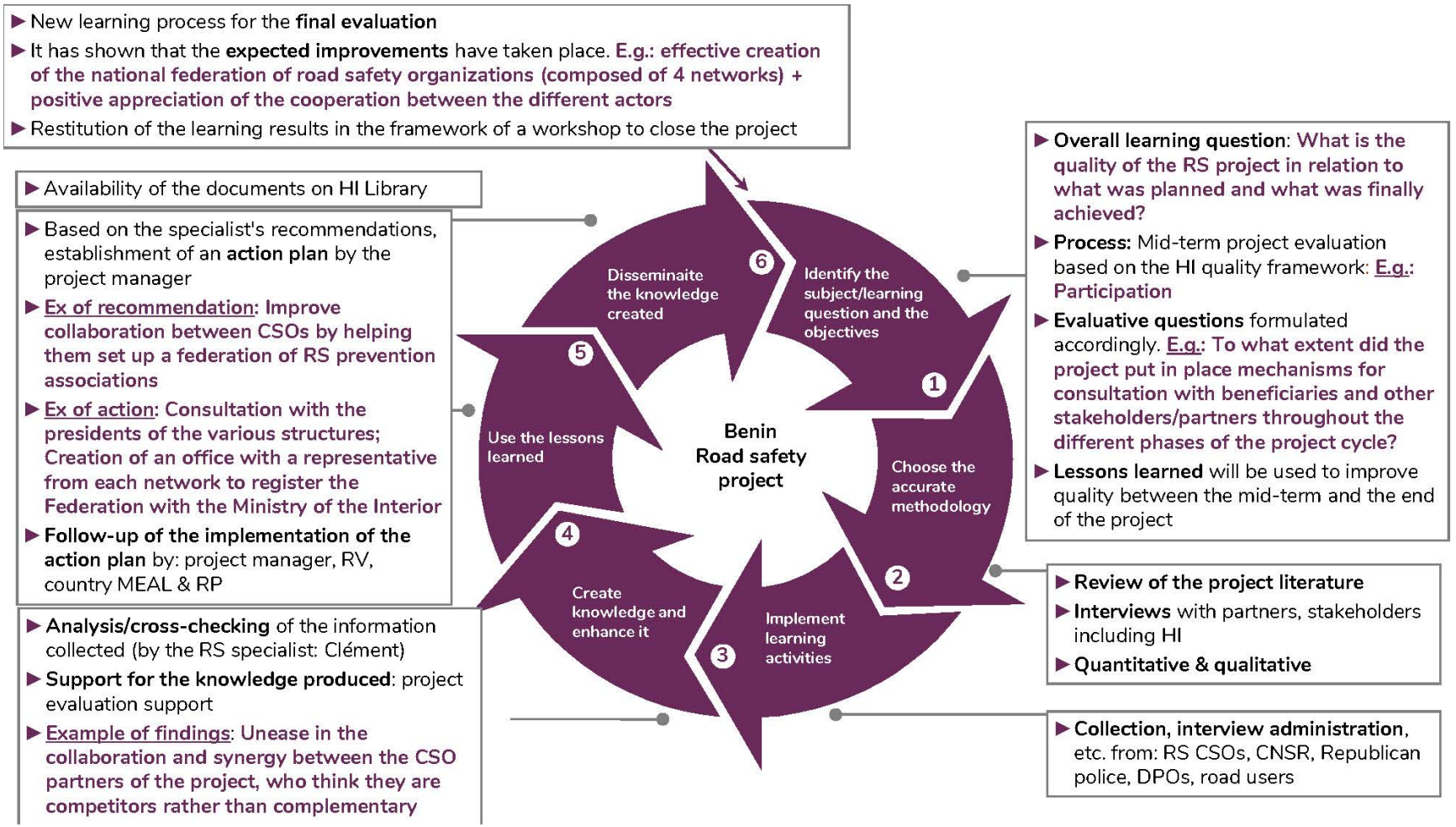
Finally, this body of knowledge can be consider - with all the knowledge formalised by the other projects in the programme - as part of the review of the area's operational strategy.

Conclusion - Summary & illustration of learning processes

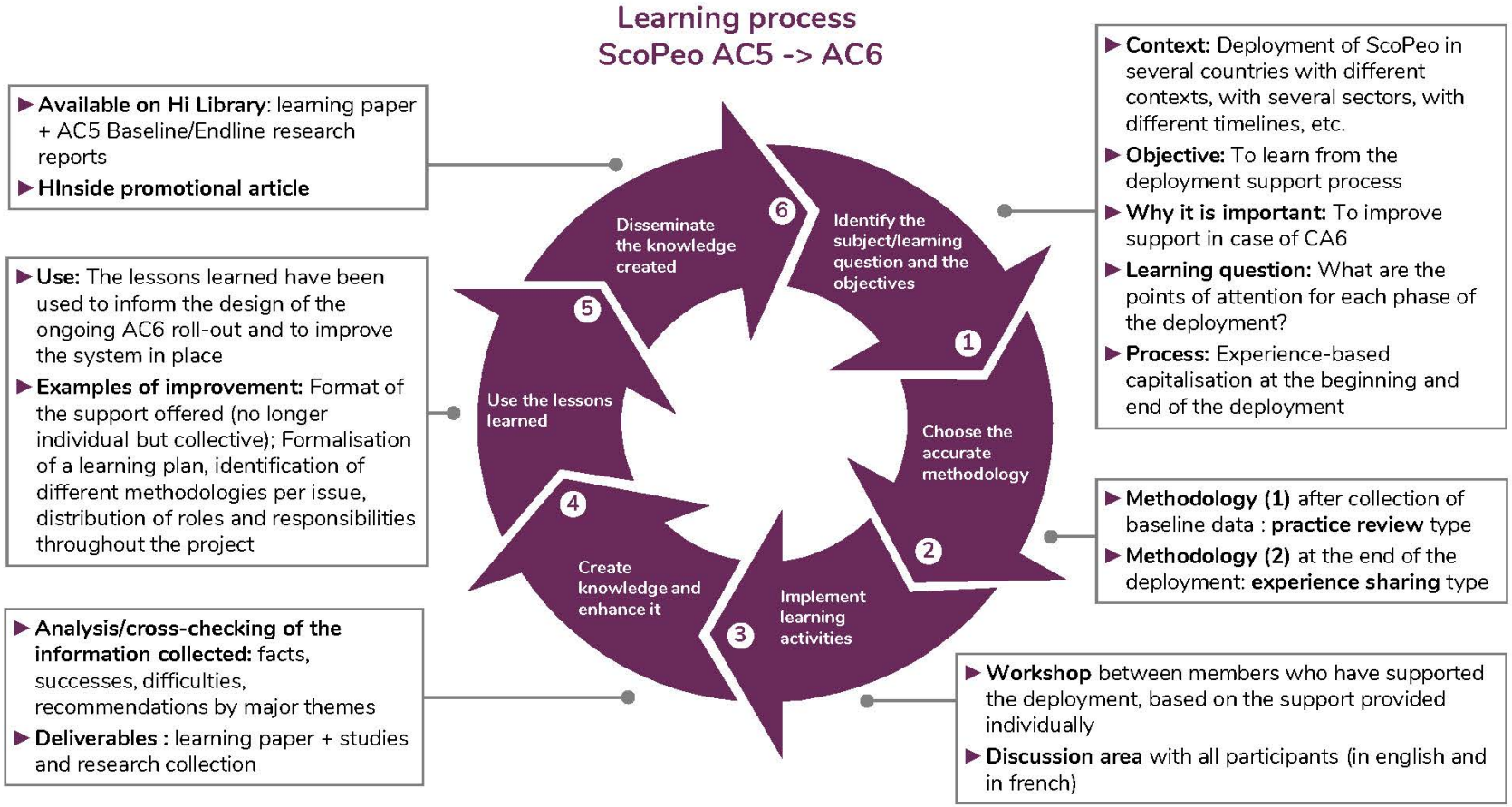
Summary of the learning process



Case study: Learning process for the mid-term evaluation of the Road Safety project in Benin



Case study: Learning process on the deployment of ScoPeO for Framework Agreement 5 with a view to improving Framework Agreement 6



Part 3 - What about continuous learning at programme level?

On its side, the programme puts in place specific learning activities, linked for example to the lessons to be learned from the implementation of the operational strategy in order to continuously improve it, and which will also be used to establish the next strategy. In this context, the 3-year MEAL/IM action plan template at programme level guides MEAL managers in formalising the programme's priorities and action plan on MEAL and IM aspects for the coming years, including learning. In particular, this format highlights good practice in regular diagnostics - using the MEAL systems assessment tool - enabling the identification of key actions to be implemented at programme level.

The programme also draws lessons by analysing the learning points that have emerged from the projects, in particular on common subjects. This may concern the partner's relationship, or taking into account the Disability-Gender-Age intersectionality, for example, which are cross-cutting approaches that must be taken into account in the development of each project. In order to make programmatic decisions in particular, all the recommendations and lessons learned from project level learning exercises should be brought together in a single document.

➔ See **Tool 4**: Lessons learned logbook - Programme level

Practical experience: Learning agenda in Mali

Given that the results of learning exercises often remain at project level, Mali's MEAL manager has created a learning agenda (only in French) during the 2023 summer[22] . As the results could undoubtedly be used throughout the programme, it was necessary to structure a document that would bring together the various learning areas envisaged by each project, and to monitor them. This diary has therefore been shared on the TEAMS area of the programme to make it accessible to everyone. The results are themselves shared on this space. Each learning project, which often involves producing a substantial document, will also be the subject of a 2-page document to make it easier to grasp the content and summarise the main learning outcomes. A template (only in French) has been created by the MEAL manager for this purpose. A workshop to monitor this learning agenda at programme level is planned every 3 months.

[22] Admittedly, forgetting the existence of the Programme Lessons Learnt Logbook, this initiative clearly shows that there is a real need to be covered.

In conclusion

Overall summary

Teams, partners and beneficiaries:

- **Have knowledge/experience that is important to formalise in order to:**
  - Improve practices along the way
  - Disseminate them and inspire others (projects / programmes / HI as a whole).
- **Participate in building up an HI knowledge base** - via capitalisation, studies, evaluations, etc. at project/programme level.
- **Participate in the construction/revision of frameworks/methodologies based on diverse realities and experiences.**

Are you experiencing problems with the learning process?

Join the professional community dedicated to continuous learning, to ask your questions and share your practices on TEAMS FED - MEAL/IM/PM community.

To find out more, go to the Hinside page dedicated to the MEAL/IM/GP professional communities, to find out how these communities are run and to register for the channels that interest you most!

Summary of guidelines and tools mentioned in this guide

Institutional policies and directives cited

- Project quality policy and Project quality framework. HI, 2022
- Ensuring the meaningful participation of populations and partners in our projects, HI, 2023
- Humanity & Inclusion's policy on Disability, Gender and Age, HI, 2018
- Archiving and records management, HI, 2019

Tools directly linked to learning design and monitoring

- Learning plan (project level) + example
- Lessons learned logbook (programme level)

MEAL/Project management tools with learning components

- MEAL system assessment tool
- ARCI for MEAL / IM & Project Management processes
- Project MEAL plan (structure all necessary MEAL elements at project level)
- PM-Box recommendations tab
- 3-year MEAL/IM action plan at programme level

Fill-in forms

- Learning paper form
- Good practices collection form
- Innovative practice collection form
- Bad practice collection form
- After-action review
- Project evaluation report template
- ScoPeO baseline & endline report templates
- Inter-services project review
- Project Health check
- Professional Publications Template (on request)

Examples cited

- Sample terms of reference for the Wish2action learning committee
- Wish2Action learning strategy
- The value of taking into account the recommendations made in a project evaluation to improve the continuation of interventions: the case of the Benin road safety project
- Lessons learned from AXIAN's public facilities development projects (Madagascar – Only in French)
- Touching Minds Raising Dignity (TMRD): Terms of reference for the learning system put in place, After-action reviews by country, Final publication
- Interview template for collecting *success stories* (EAR Programme)
- MALI Learning agenda (Only in French)
- Summary of the main learning outcomes (Mali) (Only in French)

Specific learning processes

- ➔ Capitalisation from experience process
- ➔ Results monitoring process
- ➔ Outcomes measurement process
- ➔ Evaluation process + associated toolbox + E-learning + Self-assessment
- ➔ Process for implementing a feedback and complaints system
- ➔ Research process and studies

Guidance correlated with specific learning processes

- ➔ How to conduct a qualitative/quantitative study? From planning to using findings
- ➔ Preparing and leading discussion groups: How to be inclusive!
- ➔ Planning and conducting focus group discussions: How to do it and be inclusive
- ➔ Methodologies associated with participatory approaches
- ➔ Finding your way through the tools for capitalisation from experience
- ➔ Capitalising on experience
- ➔ "Making it work" methodology: Good practices for disability-inclusive development and humanitarian action
- ➔ The art and manner of collecting and writing life stories and case studies
- ➔ Writing workshop: a mutual and collective learning tool
- ➔ Knowledge exchange toolbox: Group methods for sharing, discovery and co-creation, Unicef, 2015, 2022

Information management

- Operational information management at HI
- Data and information management
- The fundamentals of data management
- Mobile data collection Survey CTO: Basics
- Prepare your mobile data collection
- How to integrate data protection within our operations (guide) + E-learning
- Adult and child consent forms (tools 4 & 5 of the guide How to conduct a qualitative/ quantitative study)
- Studies and research at Handicap International: Promoting ethical data management

Monitoring results and measuring impact

- Resources and practical guidances for outcomes measurement
- Indicators and matrices
- Catalogues of indicators in development and emergency contexts
- Processing and analysing qualitative data

Document management

- HI Library, database of HI reference documents
- Why and how to use HILibrary?
- Project document management: Digital version - from their creation to the consolidation of the final version
- HI collaborative tools: which ones to use, for which needs?

Broadcast

- Progressive formats for appropriation
- Profession sectors: How to facilitate professional communities
- Guidance on information sharing and communication at project level

How to implement a continuous learning approach on HI projects and programmes

The aim of this guide is to reinforce HI's continuous learning approach, particularly at project and programme level.

This document is intended to facilitate the implementation of one of the three fundamental principles of HI's Quality Policy: learning.

This guide begins by reviewing the principles, benchmarks and definitions that form the framework for continuous learning. It then details the 6 stages of a learning process to be implemented to carry out a specific learning activity, which will be monitored using the project Learning plan tool. This tool is used to design and implement a project-wide learning plan. At programme level, a Lessons Learned Logbook is used to bring together all the lessons learnt from projects to take informed decisions.

Although this guide focuses on the context of a project implemented in the field, the learning approach as a whole can be transposed to the scale of a programme, a unit, a division or a "head office" project. The use of this guide is therefore recommended for everyone, whatever their area of responsibility, and at all levels of the organisation.

Humanity & Inclusion
138 avenue des Frères Lumière
CS 78378
69371 Lyon CEDEX 08
France
publications@hi.org