LEARNING

There is widespread agreement that CSOs need to learn from their work in order to improve performance. Monitoring and evaluation (M&E) can contribute to learning in many ways. These include generating new learning, highlighting the need to investigate issues in further depth, capturing and disseminating learning, and encouraging joint sense-making amongst different stakeholders.

There is almost universal agreement that CSOs should learn from their work and use that learning to improve performance. And there is widespread agreement that monitoring and evaluation (M&E) should play an important role in learning. However, within social development there is no shared understanding of what learning means, nor the exact role that M&E should play in supporting it.

Learning can be defined in many ways. One definition is:

> *"The social process by which we develop knowledge, skills, insights, beliefs, values, attitudes, habits, feelings, wisdom, shared understanding and self-awareness."* (Britton 2005, p55).

Learning may be an informal and unconscious process. But learning can also be a more formal and structured process, which results in the generation and recording of lessons.

A **lesson** can be defined as *"useful knowledge distilled from experience that establishes principles for guiding action"* (ibid). Lessons are recorded pieces of learning which are usually designed to increase success or avoid problems. They range from very specific lessons unique to a particular time and place to broad generalisations which may be applied in many different situations.

Learning can be generated and applied at many different levels:

- Learning starts at individual level, and CSO staff are constantly learning and adapting their practices and behaviours as a result. It has long been recognised that individuals learn in different ways. Some people prefer to learn by doing, some by analysing and reflecting, some by theorising, and some by experimenting (Kolb 1984). Individual learning is essential for collective or organisational learning to take place, but does not guarantee that it will.
- Collective learning often happens within small groups of people, who come together to share, discuss and analyse information. Groups may be based around specific projects or programmes. Learning resulting from collective learning can sometimes be applied immediately within those projects or programmes. But lessons might also be recorded for the benefit of others.
- Organisational learning can be defined as *"individual and collective learning in an organisational context that contributes to changed organisational behaviour" (ibid)*. Organisational learning is more than the cumulative result of individual and collective learning. It involves the development of systems and procedures which enable an organisation to test its approaches, and capture, share and act upon its joint experiences.
- Wider learning happens when learning extends beyond individual organisations. The learning may be based around a sector (such as health, education or governance), a geographic area, a programme of work involving multiple partners, or any other conceivable theme. Sometimes this is the result of informal processes involving different groups of people. But sometimes more formal learning opportunities are developed, for example dedicated conferences or communities of practice.

Types of learning

There are many different types of learning. As mentioned in the previous section, learning can be **formal** or **informal**. Formal learning happens through specifically designed learning interventions. But learning can also happen through spontaneous conversations, experiences, reflections or processes. The two are not mutually exclusive. Informal learning can sometimes be formally recorded and applied. And lessons generated through formal processes may be disseminated and discussed informally.

Learning can be **intentional** or **emergent**. Intentional learning happens when an individual, group or organisation deliberately sets out to identify learning around a certain topic, issue, or question. On the other hand, emergent learning happens when staff learn in the natural course of events, without specifically seeking out that learning.

Lessons can be **new** or **old**. Individuals and organisations can sometimes generate new lessons that were not known by anyone before. However, many lessons are not new. This means that individuals and organisations are re-learning what others have learned before. This is sometimes known as *'lesson spotting'* rather than *'lesson learning'*.

Another difference is between **exploration** and **exploitation** of lessons. An organisation may generate its own lessons through the creation of new knowledge, and apply these in its work, or share with others. This is known as exploration. On the other hand, organisations may apply lessons generated by others. This is known as exploitation (World Bank 2014). Both are needed for effective organisational learning.

A final key distinction is between **supply-side** and **demand-side** learning. Supply-side learning happens when lessons are learned and then disseminated to others. Demand-side learning occurs when staff within an organisation actively seek answers to questions that will help them in their work. This is explained further in the box below.

Supply- and Demand-side Learning

Supply-side learning often starts off with sense-making, moves onto translation, and then to spread.

- Sense-making describes a process in which staff within an organisation (or across different organisations) collectively make sense of their experiences and develop a deeper understanding of an issue.
- Staff then decide which parts of this new knowledge may be valuable to others, either within or outside their organisation(s). These parts are then translated into lessons learned.
- The lessons are then spread amongst others, so that they can apply them if they wish. This can be done by recording and disseminating the lessons. It can also be done through other means of communication, such as presenting at conferences or workshops, making videos, placing lessons on a database, etc.

Demand-side learning often starts through scanning and moves on through peer-assist and adaptation.

- Firstly, a group of staff identify a learning need (such as how to solve a specific problem or address a particular issue). They then find out who has relevant experience that could be used to help supply this need. This is known as scanning.
- Next, the staff deliberately seek out the learning from the people or groups they identified during the scanning stage (peer-assist), or from learning that has previously been recorded.
- Finally, the learning is adapted to their particular context. This involves putting new ways of working into practice, adapted from what others have learned in the past.

Source: Smit (2007)

Learning in a context

Learning is often specific to a particular context, such as a geographic location, a culture, a sector of work, a working approach, a political environment, a position in the aid chain, a specific type of project or programme, or any other kind of context. Learning may also be specific to a combination of different contexts. For example, a lesson may be appropriate to a specific type of capacity development support provided to institutions working in the health sector, operating under a particular government. Outside of this context the lesson may not be valid.

This has two main implications. Firstly, learning happening in one context may need to be adapted significantly if it is to be used in another context. Indeed, some learning is so context specific that it is useless outside of that context, and there is little point in sharing it.

Secondly, lessons learned in a particular context often need to be generalised if they are to be applied more widely. It is much more difficult to generate useful learning that can be applied across many different contexts than to generate useful lessons within a specific context. Indeed, many generalised lessons are not new at all, but are simply existing lessons re-learned or re-emphasised (see case study below).

Case study: Lessons from climate change projects

A project on climate change adaptation, implemented in an Indian city, learned that it was essential to involve the local Chamber of Commerce. This was because it was seen as an important power-broker in the project location. This important learning helped improve performance within the project concerned.

In a similar project implemented in another part of the world, local staff learned that they needed to work through party (rather than government) channels. Again, this important learning helped the project navigate the political complexity of the environment.

Both these lessons were new within their own contexts, as both were dealing with relatively new issues in the locations concerned. But when put together with similar learning, the generalised lesson became *"it is important to involve the right stakeholders in a climate change project"*. This is undeniably true, but is hardly a new lesson learned.

"A golden rule for M&E practitioners is that the more learning is applied across multiple locations and contexts, the less likely it is to be 'new' learning."

The purpose of learning

Within M&E, learning is not an end in itself. To be useful it needs to feed into improved performance or practice at some level or other. This can happen in many ways. For example:

- learning can feed directly into management decision-making within a project or programme;
- it can help an organisation re-define or examine its strategies or assumptions, or even re-define its vision, values and mission;
- learning often contributes to messaging for advocacy campaigns or policy influencing work;

- learning may be disseminated and used by other stakeholders within or outside the organisation(s) generating the learning, such as other organisations working in similar contexts; and
- within pilot or innovation projects, learning may be deliberately carried out to decide how or whether to replicate or adapt the projects.

Sometimes, learning can also be shared more widely to contribute to global knowledge, without any specific use in mind. This learning may not be used for many years, but then may be picked up and used at a later date. Or it may never be used.

Sometimes, people draw distinctions between different purposes of learning in terms of different loops (see box below).

Different loops of learning

Single-loop learning focuses on whether or not an organisation is doing things well. It is concerned with existing rules and procedures, and dealing with immediate problems. If carried out well, single-loop learning results in improved project or programme performance.

Double-loop learning is concerned with whether or not an organisation is doing the right things. It involves questioning existing assumptions and broadening understanding of how and why an organisation is doing what it is. It can lead to new strategies, systems, rules and procedures.

Triple-loop learning involves examining core identities and values, and re-thinking fundamental purposes and principles. It can result in renewed mission and vision.

Source: Britton (2005)

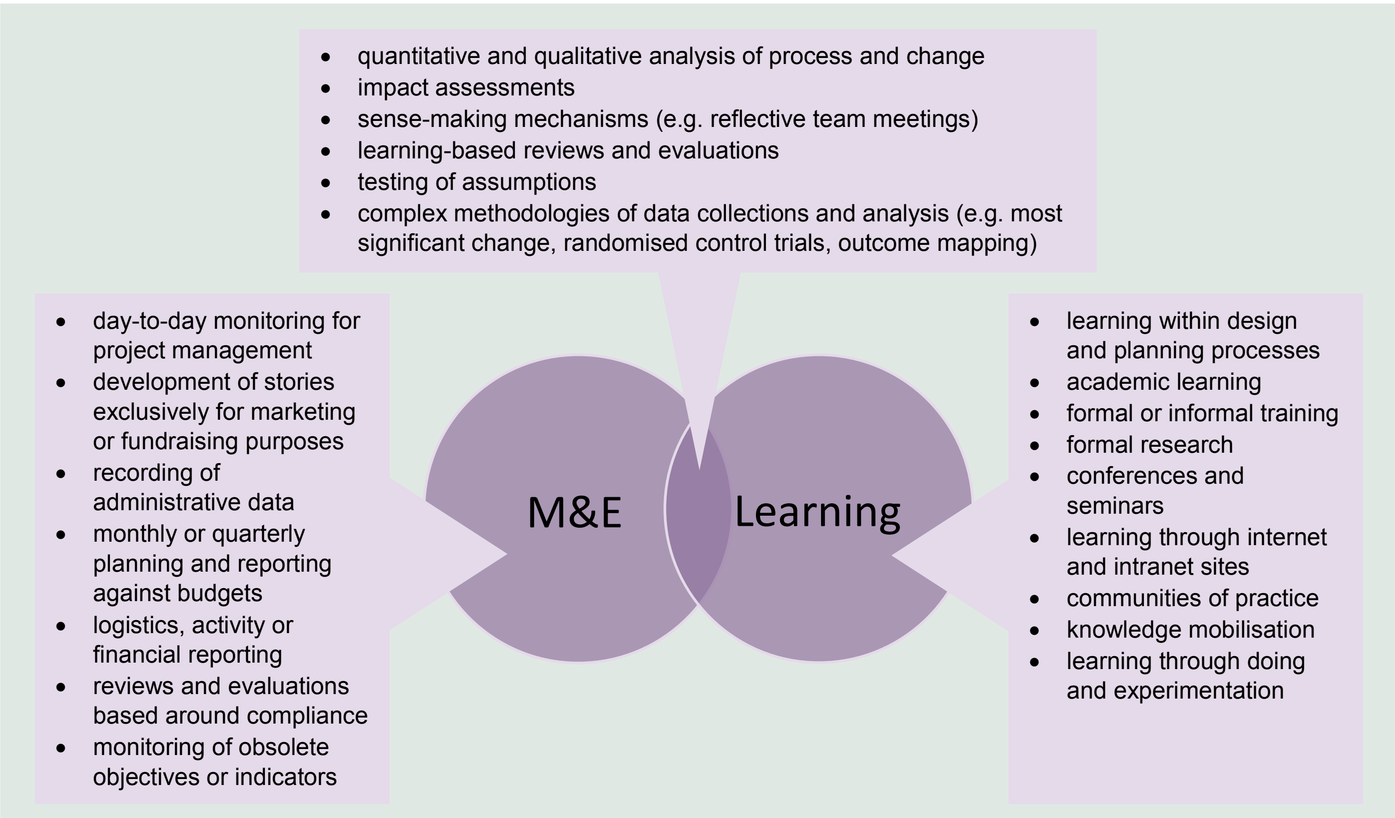
M&E and learning

Many organisations attempt to integrate M&E and learning in different ways. Indeed, many CSOs operate integrated monitoring, evaluation and learning (MEL) systems. However, M&E and learning are not the same thing. Some M&E has very little to do with learning, and much learning happens independently of M&E. This is illustrated in the diagram at the foot of the page. The diagram is not comprehensive or definitive, but it does show where there may be overlaps and differences.

For example, a lot of monitoring is carried out for day-to-day project or programme management, or to ensure compliance with laws and regulations. The information generated may not be particularly useful for learning. Equally, M&E processes may be used to report to donors on objectives or indicators that are obsolete, or of little use to the organisation collecting the information. This is never desirable, but may be necessary for accountability purposes.

On the other hand, learning may include aspects such as academic learning, formal training, research, workshops and conferences, and digital spaces, which may be conducted independently of M&E processes. Learning within projects or programmes may also be generated during design and planning processes, when developing situational analyses or Theories of Change. And there is a whole branch of individual learning that is often informal and is not the result of any systematic process.

Clearly, however, there is a large degree of overlap. M&E can contribute to learning in many ways. Some of these are described on the following page.



- M&E often involves the generation of new learning, which can then be used to improve existing or future performance. This learning may result from the collection and analysis of new information; the analysis of existing information; or (more often) a combination of both. The learning can be used at the level at which it was generated, or it can be used by people in other projects, programmes or organisations.
- M&E findings may highlight the need to investigate an issue in further depth, particularly if it reveals that work is going especially well or especially badly. For example, interesting but inconclusive findings resulting from M&E may be followed by in-depth research on a topic in order to generate actionable learning.
- Learning happens within organisations all the time, irrespective of how good or bad an M&E system is (or even whether one exists or not). It is often useful to capture some of this learning by recording and storing lessons learned. These can then be used immediately, disseminated, or retrieved and used at a later date. Even if the learning happens outside a traditional M&E system it can still be captured and handled via the system.
- Some M&E systems (or evaluations) support processes designed to generate mutual learning between different stakeholders. These could include stakeholder reviews, workshops, peer reviews, exchange visits, seminars, conferences, and many mechanisms supported by new technology. These processes create space for staff and other stakeholders to review and analyse information, and openly discuss successes, failures and lessons learned in a safe environment.
- M&E systems often include organisational processes and mechanisms designed to communicate and disseminate learning. Learning can be communicated in many ways, including written reports, presentations, photographic displays, videos, websites, intranet sites and blogs, to name but a few.
- Participatory M&E can support a variety of different stakeholders to engage in mutual learning. This helps to instil ownership in a project or programme as well as generating relevant and useful learning. Sometimes this learning can be applied immediately to improve a project or programme.
- M&E systems or evaluations sometimes include decision-making mechanisms which are designed to translate M&E findings, conclusions and recommendations into actions.

Unfortunately, there is often no common agreement on exactly how M&E should relate to learning. Many larger CSOs, particularly international non-governmental organisations (INGOs), operate MEL systems that incorporate both M&E and learning within the same departments. But many large organisations divide learning and M&E into different departments. M&E practitioners are often left to decide for themselves how far to integrate M&E systems with learning processes, and whether or not they should oversee learning processes that are not traditionally considered part of an M&E system.

Learning-focused M&E

Successive studies by many agencies, including INTRAC, backed up by observations in the field and comments received during M&E training courses, reveal that in larger agencies there is often a disconnect between M&E and learning (see for example Smit 2007, Ross 2015, Adams 2007). This is for many reasons, some of which are as follows:

- information collected through M&E is often too poor quality to generate actionable learning;
- the type of information collected may not be suitable for learning, especially if it is primarily collected to support the needs of external agencies;
- many donors and funders prefer quantitative information, even when that information is not so useful for learning and decision-making;
- if CSOs are unable to operate flexible results frameworks they often end up collecting information on obsolete or out-of-date objectives and indicators that are of no use to them;
- some M&E is focused on the generation of simplistic messages used for marketing or fundraising that do not really capture the messy reality of work on the ground; and
- carrying out M&E for learning is harder than reporting on simple indicators for accountability purposes: many evaluators and CSO M&E staff simply do not know how to do it well.

The reality is that learning within CSOs is often carried out in parallel to formal M&E systems, rather than being integrated. Whilst it is possible to develop M&E (or MEL) systems that genuinely support learning and improved performance, and many CSOs have successfully done so, the evidence suggests that these need to be consciously and explicitly oriented towards learning. Some guidelines on how to do this are covered in a separate paper in the M&E Universe, dealing with learning-based M&E systems.

Further reading and resources

Another paper in the M&E Universe follows on from this paper and is called Learning-based M&E systems. Learning is also covered in the paper on adaptive management. Other relevant papers in this section of the M&E Universe deal with project and programme management, and accountability.

Learning-based M&E systems

Adaptive management

Project and programme management

Accountability

The paper written by Britton (2005) on organisational learning in NGOs contains a good background to the subject, and is available freely from the INTRAC website.

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INTRAC is a not-for-profit organisation that builds the skills and knowledge of civil society organisations to be more effective in addressing poverty and inequality. Since 1992 INTRAC has provided specialist support in monitoring and evaluation, working with people to develop their own M&E approaches and tools, based on their needs. We encourage appropriate and practical M&E, based on understanding what works in different contexts.