

# Navigating Learning: The What, Why and How of Becoming More Effective Learning Organizations

## Speaker's Corner Summary Report



*The three-day online discussion forum brought together over 150 participants from all over the world to discuss their experiences and ideas related to knowledge sharing and learning processes.*

**Speaker's Corners are online discussions hosted by subject matter experts, designed to help practitioners share and learn from each other. They are hosted on microLINKS ([www.microlinks.org](http://www.microlinks.org)) and Poverty Frontiers ([www.povertyfrontiers.org](http://www.povertyfrontiers.org)).**

This report describes the key points raised in the 'Becoming More Effective Learning Organizations' Speaker's Corner held March 4-6, 2008. The objectives of this online discussion were for development organizations and practitioners to explore ways to improve knowledge sharing and learning processes, thereby strengthening the integration of lessons into idea generation and improved programs.

This report draws on the wide-ranging discussions that took place, and presents the key points and ideas raised, using four main overarching questions.

### **1. What is a More Effective Learning Organization?**

What is meant by a "more effective learning organization" and what ideas and conceptual approaches are important for such an organization?

### **2. Why Become a More Effective Learning Organization?**

What goals and motivations underlie efforts to strengthen learning? What are particular goals of learning development organizations?

### **3. How Can Tools and Techniques Be Used to Become a More Effective Learning Organization?**

What practical tools and techniques can be used by individuals, groups and organizations? What issues face the use of tools and techniques?

### **4. How Can Strategic and Institutional Issues Be Addressed in Becoming a More Effective Learning Organization?**

How to move beyond tools and techniques to bring about organizational change?

#### **Welcome Message**

*"This Speaker's Corner... will focus on the need for improved knowledge sharing... Knowledge is perhaps the single most important asset to bringing about the sustainable change that development organizations are pursuing... How can we build more effective learning organizations?"*

**Jan Maes (Moderator) Day 1**

#### **April 10, 2008**

This publication was produced for review by the U.S. Agency for International Development. It was prepared by Ben Ramalingam, Strategic Advisor, Active Learning Network for Accountability and Performance in Humanitarian Action (ALNAP).

The summary highlights specific discussion contributions that proved helpful in clarifying issues and suggesting practical ways to solve problems. The Final Points section (page 8) draws conclusions about the overall contribution of the discussion, and makes suggestions for a future agenda for this important area of work.

## I. What is a More Effective Learning Organization?

The Speaker's Corner included a number of concrete suggestions about what a learning organization actually means in practice. From the participants' perspective, a learning organization is one which does some or all of the following:

- Manages information effectively
- Creates and maintains the space for dialogue
- Understands and promotes the transformation of knowledge to learning and to action, in all of its mission-critical work
- Doesn't reinvent the wheel; avoids repeating mistakes
- Engages effectively with external stakeholders
- Achieves its mission in an adaptable and flexible manner

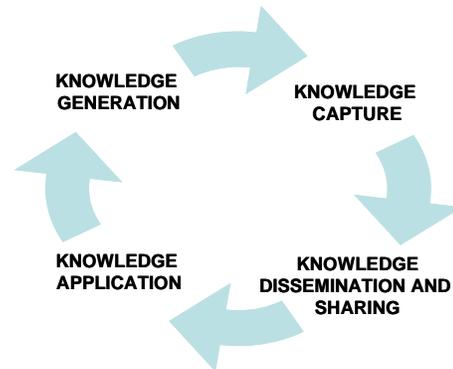
The ideas and approaches to building more effective learning organizations vary from place to place, organization to organization, and even person to person. Of the approaches suggested by discussion participants, two stood out.

First, it was highlighted that learning in development organizations should not be limited to looking at why certain things did not go as planned (known as single-loop learning) but should go beyond to look at organizational systems, behaviors and limiting assumptions that determine how development issues are approached (known as double-loop

learning). This is particularly relevant, given the need to achieve missions in an adaptable and flexible manner.

Second, the discussions also highlighted consensus around the idea of a number of knowledge processes which learning organizations need to have in place. Figure 1 below illustrates the knowledge cycle concept applied by USAID, which brings four knowledge processes together.

**Figure 1: Knowledge Cycle**



- Knowledge generation - rooted in technical understanding of microenterprise approaches and issues.
- Knowledge capture - presents the most useful knowledge captured from ongoing work in forms that are easily digestible by key audiences
- Knowledge dissemination and sharing - draws on overall objectives, key audiences, opportunities
- Knowledge application - highlights refinements to existing knowledge, and the gaps and additional knowledge needed

Experiences were drawn upon to highlight that knowledge itself needs to be understood not just as explicit facts - *know-what* - but as knowledge about how to do things – for example, approaches to problem solving. *Know-how* can sometimes be articulated in documents, but is more readily shared through discussion and dialogue.

### Box 1: Different Types of Knowledge

**Tacit knowledge** is unconscious and intuitive; it allows experts to make decisions without referring to rules or principles (e.g. knowing how to perform medical operations, knowing how to network at a conference);

**Explicit knowledge** is clearly articulated and accessible to anyone who reads, hears or looks at it (e.g. a training guide on using a software package or the conclusions of a policy briefing paper).

From: [Implementing Knowledge Strategies](#)

As one participant stated *“In my view, what is important to learn is how to analyse and solve a problem, not necessarily to restate verbatim some ‘solution’ to someone else’s problem. This is significant in that what then needs to be transferred are not just lists of facts but approaches...”*

This means taking a broad view of what constitutes knowledge in each of the knowledge cycle processes, including not just ‘know-what’ but also ‘know-how’. In practical terms, this means that a learning organization needs to have in place both information assets (enabling capture and exchange of explicit knowledge) and mechanisms for dialogue and social learning (enabling the sharing of tacit knowledge and the creation of new knowledge). As one participant stated: *“...[on] one hand, you have a central repository with a well designed lexicon and on the other a free flowing tacit system focused on the immediate needs of learner/workers...”*

## **2. Why Become a More Effective Learning Organization?**

Predictably, becoming a more effective learning organization is trickier than saying what one is. It is vital to improve understanding of the role that knowledge and learning strategies play in an organization, and to clarify *why* it is important to become a more effective learning organization. At the institutional level, as was stated in the Speaker’s Corner introduction, becoming a learning organization means making the best use of what is possibly the most vital asset in efforts to bring about sustainable development: knowledge. Recognition of this fact is not easy, however. Box 2 highlights how one network of NGOs identified the value of knowledge and learning for their operational work.

Day 1 of the Speaker’s Corner started with a useful articulation of a number of goals specific to learning and knowledge strategies, which were then added to by others over the course of the event. A knowledge and learning strategy should be implemented for several reasons:

1. Learning enables the organization to achieve its mission. A knowledge and learning strategy

means staff learn from what they do, so that they can do it better, more efficiently, more effectively, and in a more adaptive manner.

2. Learning enables the preservation of knowledge as an organizational asset. As knowledge lives in the minds of the people who do the work of the organization, knowledge and learning strategies enable organizations to address the risk of losing key knowledge due to staff turnover.
3. Learning is essential to leveraging the assets of poor communities and marginalized groups in developing countries.

### **Box 2: Identifying the Value of Knowledge and Learning**

*“The executive director of an international network of NGOs [asked] can I please convince her Board that KM is important? I [ran] a workshop with the Board members, where I asked a series of 3 questions: Question 1: What are the important development outcomes their network wants to help bring about? Question 2: What programs, functions or projects of your network and its members are very important in achieving those development outcomes? Question 3: What skills, information/knowledge, support systems and relationships are very important in implementing this program well?”*

*For each question, ideas were shared on cards, clustered, and prioritised. The conclusion was: ‘...according to your collective judgment, the performance of your organization hinges on how well you manage the knowledge items in this priority shortlist’...”*

**Serafin, Philippines**

The discussions highlighted a program in the Philippines, which scanned more than 950 anti-poverty projects in that country. In a study of some of the most successful projects, one of the key findings was: *“They are successful because they leverage the local community’s intangible assets - cultural/social capital, structural and stakeholder capital, access rights, indigenous knowledge...”*

Work by Practical Action - highlighted in Box 3 below suggests that knowledge is seen as a crucial asset by rural peoples.

The message seemed clear: knowledge is central to the development mission. Learning is a key process for ensuring that development organizations can see how effective their work is, and then work to improve it in the future. From this perspective, *Becoming a More Effective Learning Organization* means nothing less than improving development aid effectiveness.

An interesting debate took place on whether learning was a goal in and of itself. One perspective was that learning happens in order to do something, to improve some condition, and to get something done. An alternative perspective started from the idea that if learning is the backbone of sustainable social change, it is important to accept that learning is an end in itself. The two positions are not mutually exclusive – learning can be both a goal and a process. However, if learning is seen as a goal of

### **Box 3: Why is knowledge important for development? Perspectives from Practical Action**

The work of Practical Action with rural communities in Bangladesh and elsewhere highlights the importance of knowledge:

*“Knowledge helps people to engage themselves in diverse work in rural life; it helps them managing and maintaining family; it is about self-development; it helps in solving problems and in making decisions; it brings change in their life; it means ways of earning; it means improving their children's education; it increases mutual respect and happiness; it changes social behavior.”*

#### **Abdur Rob, Practical Action Bangladesh**

*“The place of poor and marginalized communities in knowledge sharing cannot be ignored: knowledge sharing is a two-way traffic. We can learn a lot from traditional knowledge and real problems faced by people who need the knowledge to cope with overwhelming changes. The focus on organizations is not enough to make knowledge resources available to those who need them most.”*

#### **Zbig, Practical Action**

development, the ideas and concepts of learning move away from being ‘another support function’ and towards a central strategic objective for development agencies.

### **3. How Can Tools and Techniques Be Used to Become a More Effective Learning Organization?**

Getting started on the route to becoming a more effective learning organization is a challenge for many organizations.

As one participant put it: *“Assessment is a major part of getting started with knowledge management and learning within any organization...The goal is to discover what you already have going for you and where you need to focus your efforts for improvement...”*

#### **Assessments**

How do we understand these aspects of the knowledge processes, the critical ‘know-how’ that an organization should focus on? Perhaps the first tools to be applied are *learning needs assessments* or *knowledge audits*. Participants shared many accounts of their experiences with such approaches. As one participant suggested:

*“Assessments should cover the potentialities of the staff to solve the next set of problems, not just the documents that codify the last team's handling of last year's problems. Not that lessons learned and the like aren't useful. But it's as important to capture the subtlety of thinking of the people involved than just the ‘facts’...”*

Experiences with knowledge and learning assessments at Freedom from Hunger highlighted two distinct approaches. The first was a systematic, multi-method knowledge audit, which utilized staff survey, inventory of knowledge assets, system reviews, technology review, portal use statistics, interviewing, and job shadowing to build a complete picture of information and knowledge flows within the organization. The second approach was more participatory and “bottom up.” Workshops were held with each of the main departments, the goals of knowledge and learning were shared, and priorities collectively identified. The two assessments developed a nearly identical list, raising questions

about the most effective approach. As the knowledge manager at Freedom from Hunger put it:

*“If I had to do it all over again, I would have focused on the participatory assessment because it builds buy-in and recognition of the need from the beginning...”*

**Learning Tools**

An important part of the assessment is identifying ways in which the problem of learning can be solved with practical tools and techniques. To continue the experiences of Freedom from Hunger:

*“When I work with a team and try to choose tools I listen for the goals and needs of learning and the nature of work to see what needs to be same time, same place, different time, different place and what tools best facilitate the learning...”*

The time-place dimensions provide a useful way of understanding how different tools work in various situations (see Figure 2). It was suggested that there are two basic approaches to the tools. The first approach is about *creating opportunities & space for dialogue*.

Examples include:

- After Action Reviews
- Communities of Practice
- Open Space
- Relay Training (see Box 4)

The second approach to tools focuses on *systematically managing documents and other information*.

Examples include

- Emails
- Portals
- Databases

To be most effective, these two approaches should reinforce each other. In many organizations, however, there is a tension between them, and an organization ends up focusing on one—usually information management—to the detriment of the other. As one participant stated: *“We're focused on knowledge management rather than learning, even though learning is really the point of any knowledge management system!”*

Figure 2: Time and Place Framework		
TIME		PLACE
S A M E	Same time is usually best for brainstorming and problem-solving, bring together collective experience, scope for creativity and innovation.	Same place means that a group or team has a common space to share learning, enabling a single point for reference.
	<u>Same Time Tools:</u> -Brainstorming -Meetings (Open Space, AARs) -Phone calls -Web-conference	<u>Same Place Tools:</u> -Shared office or file cabinet -Shared network drive -Document repository -Online group or collaboration space
D I F F E R E N T	Different time tools are good for individual reflection, handling larger amounts of information, and absorption into long-term memory.	Different place refers to each team member keeping individual stores of documents and memory aids.
	<u>Different Time Tools:</u> -Discussion board -Blog -Wiki	<u>Different Place Tools:</u> -My documents -Email.

Studies conducted by Overseas Development Institute (ODI) and ALNAP suggest that while only a minority of knowledge and learning initiatives focus the larger part of their efforts on the social, on-the-job and tacit aspects of knowledge and learning, the needs of field workers are squarely in this area. This resonates with the findings of a research project highlighted by one participant: *“One of the most important insights from our research is that knowledge that is actually implemented is much more likely to be acquired from learning by doing than from learning by reading, listening, or even thinking.”*

If “on-the-job” learning has the greatest impact, then approaches to learning need to take this into account. How can agencies establish methods and systems to provide knowledge when it is needed, where it is needed, and in a size and form that can be efficiently absorbed and directly applied? This question highlights the fact that becoming a learning organization is about more than using learning tools. It is also necessary to address the institutional dimensions of becoming a more effective learning organization.

## Box 4: Two Tools of Interest

### Open Space Technology

In Open Space meetings participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance. This approach is effective at connecting and strengthening what's already happening in the organization: planning and action, learning and doing, passion and responsibility, participation and performance.

Open Space works best when the work to be done is complex, the people and ideas involved are diverse, the passion for resolution (and potential for conflict) are high, and the time to get it done was yesterday. It's been called passion bounded by responsibility, the energy of a good coffee break, intentional self-organization, spirit at work, chaos and creativity...

### Daan, Independent Consultant

### Relay Training

Relay training is basically an informal peer training approach. If one of our staff receives training or attends a conference about an issue that is potentially interesting to other staff members, we try to use one or more pre-existing routines or spaces for them to share with others the key lessons they have learned.

[Practical Action] did this with very good results when two team leaders (Sudan and Zimbabwe) were invited at the beginning of 2007 by the Wellcome Trust to an international conference in Cambridge, UK on animal health. The team leaders committed to pick up the key lessons and share them with the team leading a dairy project in Cajamarca, Peru.

### Luis, Practical Action

More information on tools for knowledge and learning can be found via the [ODI-RAPID Toolkit](#).

## 4. How Can Strategic and Institutional Issues be Addressed in Becoming More Effective Learning Organizations?

So the *what* and the *why* of the learning organization have been addressed, and via assessments and tools, part of the *how* has also been addressed. But the task of becoming a more effective learning organization is complex. Participants were clear that those working on knowledge and learning strategies need to move beyond tools and techniques to strategic approaches aimed at bringing about organizational change.

When assessments were done effectively, many participants highlighted that knowledge and learning issues stem from deeper institutional problems. A number of suggestions were made as to how these problems can be approached.

Some suggested that organizations need to “...define a vision and a strategy; assign roles and functions; create accountability routines; and even assign a budget.”

An effective vision and a strategy involves engaging and encouraging: “...strong leadership in putting learning and knowledge sharing very high on the organizational agenda,” as one participant put it.

Experiences also highlighted that assigning roles, functions and accountability routines often requires working towards “*consensus and ownership*” at different levels of the organization.

Several participants suggested that the budget should be constructed and allocated in a way that allows mainstreaming of knowledge and learning at the project and program level. Specifically, learning activities “...should be an integral part of project budgets and of any support to [development/microfinance organizations].”

Finally, the benefits of knowledge and learning need to be actively communicated around the organization, such that “...people at every level of the organization see change happening in daily decisions and attitudes as a result of KM&OL-related activities... [and] staff realize that KM is not an abstract, remote thing, [but] common sense, practical, fun and at their reach.”

On this last point, convincing internal and external stakeholders of the value of knowledge and learning is one of the most challenging aspects of any initiative. This can be done by involving the key decision makers in the strategy development process and highlighting the benefits for these groups from stronger knowledge processes.

In one organization, for example, senior management was heavily involved in the strategy development and implementation of the project, and careful attention was paid to how they would benefit from improved knowledge generation, exchange and uptake. *“They too can learn about what works on the ground and use those learnings in their meetings with other stakeholders...”*

However, the challenges of convincing senior managers and donors of the benefits of learning cannot be underestimated. Both of these groups need evidence that the aid they provide and deliver is effective. However, there is a lack of data on the impact of knowledge and learning. One participant suggested that it is important to highlight the costs in terms of wasted resources and lost opportunities. Another participant suggested that this provided a low-cost, practical approach to making the business case for KM to senior managers:

*“If you can find an example of duplicated efforts in your organization (or in the external activities it supports), it can be fairly easy to figure out at least a rough estimate of the cost involved in the effort that duplicated something already being done. That cost is a clear and specific cost of not doing KM. And, if you can find an example of something that was done that failed because it was not in accordance with best practices – practices about which information was available but that your organization didn't gain access to and apply – the cost of that activity, too, is a clear and specific cost of not doing KM...”*

The question of putting a cash value on the benefits of knowledge and learning was raised and discussed, highlighting the need for more work in this area.

The external and internal aspects of organizations have a crucial impact on efforts to become a more effective learning organization. Institutions that become learning organizations need to work hard to bring the public and private elements of their work together. But as one participant from Pakistan stated: *“There is a huge gap between public transcript and private transcript of organizations.”* The challenges are highlighted in Box 5.

One way of bringing together the public and private dimensions of an organization is through a strong

focus on people. Ultimately, becoming a more effective learning organization means getting the best possible performance from existing staff and partners, while grooming new staff and partners for the future.

As one participant put it, this means the technical staff and the human resources leaders need to buy in early, and technology should be addressed later. This is, however, challenging: *“...This gets you into what often is uncharted territory; personnel performance evaluation policies, regulations on the use of retired staff, mentoring approaches, exit interviews and other approaches...”*

These wider institutional issues can be dealt with systematically through the use of comprehensive and cohesive knowledge sharing framework, such as that of CARE. The CARE knowledge sharing framework is composed of nine different components which form a cohesive knowledge sharing and learning structure that can be applied to a program or an organization (See Box 6).

#### **Box 5: Public Versus Private Aspects**

*“The public transcript is how we all in development express our work; it's the words, terminologies, and symbols that we use to describe our work and which enable us to communicate with one another while often in different cultures and enables us to relate to one another...The public transcript is how we describe our work within the accepted paradigms of the day; however what we actually experience in the field; the complexities, the nuances etc is expressed in the private transcripts that we experience and respond to. The literature that organizations produce, the manuals that are designed are all based on the public transcript of organizations... most of the learning lies in the private transcript...”*

**Mehrul, Care**

## Box 6: The CARE Knowledge Sharing Framework

CARE took a programmatic approach to the Building a More Effective Learning Organization project. A Knowledge Sharing Framework was used as the basis for the needs assessment. The nine components below are listed with a brief explanation:

Strategy: The plan to be implemented for managing organizational knowledge.

Governance: Structure and systems by which an organization controls and oversees its knowledge processes along best practices and the organization's strategic vision.

Monitoring and Evaluation: Methods to measure ongoing knowledge sharing activities and their link to organizational productivity.

Culture and Behaviors: Norms and attitudes toward knowledge sharing activities in an organization.

Policy and Incentives: Understanding what compels knowledge sharing behaviors in the organization and the alignment of those behaviors to performance management practices.

Technology / Tools: The enablers of knowledge sharing behaviors and activities that accelerate time to competence and productivity within an organization.

Content: The content architecture and set of standard requirements to enhance content quality in an organization.

Communications: The channels of communication used to deliver and share knowledge in an organization.

Process: The standard work processes to support the systematic sharing and use of knowledge in an organization.

## Final Points

*"We have to have some clear ideas of what we need, what we want to achieve, and what things will work in our organizational environment. External experts can help an organization become a more effective learning organization, but their function should be to 'fill in the blanks' not to paint the whole picture for the organization..."*

Perhaps the most important learning for many participants in the Speaker's Corner was to move beyond tools and the tendency to see learning as a technical, process issue which can be addressed by learning tools and systems alone. The point was made eloquently by one participant:

*"I had a tendency to think of systems as purely technical – I was missing the boat on some other key needs: the freedom and safety of people to express their ideas, knowing that they will be honestly considered; understanding that difference of opinion can spark new ideas - i.e., people understand that it's good to disagree in a constructive manner; risk taking can lead to really interesting innovations - again, giving people the freedom to try new things that might fail. It's worked for me to understand that I need to build systems that support learning, not systems that 'try to do' the learning.*

*I believe that there does need to be systematic approaches to how my organization learns: defining what happens after a project is finished (answering questions such as: what did we want to do; did we do what we wanted to do; what happened that we didn't expect) and what we do with the knowledge gained (how will we share this). Providing time to ask these questions also lets us reflect on what our original goal was expected to be and what our outcome actually was."*

-Sarah, Population Action International

It is particularly appropriate that the suggestions above are the steps that are at the heart of the After Action Review process. The key message is that effort needs to be put into both learning, and learning *how* to learn. Experience so far on how to learn suggests that it is important to move beyond viewing learning as a system of steps and procedures, and more as an institutional change process, a range of supportive elements and enabling environmental factors.

Perhaps the most important of these is an organizational culture and leadership that promotes learning. If these elements are not in place, then becoming a more effective learning organization means changing these aspects of an organization. Learning then

needs to become part of the overall strategic approach of an organization. It means that dialogue needs to happen, mistakes need to be admitted, and partners need to be involved. It means that complexity needs to be acknowledged.

Such change is never easy, nor does it happen overnight. But as numerous participants highlighted, it is both possible and important to try to become better learning organizations, and to learn from these efforts. It is clear that from the participants perspective, successfully navigating the *what, why and how* of learning can lead to more effective aid programs and projects. There is a lot of potential still there to be realized.

### **Future Steps Towards Becoming A More Effective Learning Organization**

Five key points stand out from the Speaker's Corner which are worthy of more investigation, discussion, and learning:

- Work to understand the tensions between the public and private aspects of the organization, and the implications for learning. In particular, address the blame vs gain culture at work within the organizations. Work to understand mistakes that have been made, how they have been dealt with within and outside the organization.
- Analyse and understand the potential for leadership to strengthen efforts to become more effective learning organizations, and develop case studies of effective 'learning leadership'.
- Initiate dialogue between key stakeholders, including Southern partners, international agencies and donors about mechanisms and practices which promote / inhibit learning within development organizations.
- Develop and test a range of different and innovative mechanisms to monitor and evaluate the benefits of BELO.
- And finally, and perhaps most importantly, understand the role of poor people and communities in strengthening learning for development, and the specific kinds of roles that development organizations can play.

### **About this Speaker's Corner**

The facilitators, Jan Maes, Sara Naab Schaff, Luis Osorio, and Sybil Chidiac, and a number of participants were part of the USAID-funded BELO program, which funded four agency-specific projects to strengthen learning. We thank all facilitators and participants for their thoughtful contributions to the forum.

### **Further Resources**

- View all resources from this Speaker's Corner at [www.microlinks.org/learningorganizations](http://www.microlinks.org/learningorganizations)
- Download a comprehensive PDF document of all [discussion posts](#).

#### **DISCLAIMER**

The views expressed in this publication do not necessarily reflect the views of the U.S. Agency for International Development or the U.S. Government.