

Learning and Adaptive Management

Using evidence, reflection and collective learning to improve project decisions and results

Evidence-led decisions | Structured reflection | Course correction

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Learning
Adaptive
Management

Learning Objectives

By the end of this chapter, participants will be able to:

- ✓ Explain organizational and project learning
- ✓ Develop learning questions and learning agendas
- ✓ Facilitate structured reflection sessions
- ✓ Conduct after-action reviews
- ✓ Document lessons and good practices
- ✓ Strengthen knowledge management
- ✓ Establish communities of practice
- ✓ Apply adaptive management principles
- ✓ Use evidence for course correction
- ✓ Update the Theory of Change and project strategy
- ✓ Track learning actions to completion

Learning in MEAL

Learning is one of the four pillars of MEAL:

- **Monitoring:**

Tracks implementation and results

- **Evaluation:**

Assesses relevance, effectiveness and impact

- **Accountability:**

Ensures responsiveness to stakeholders

- **Learning:**

Uses evidence to improve decisions and performance

What Is Project Learning?

Project learning is the systematic process of:

- Collecting evidence
- Reflecting on experience
- Understanding what is working
- Identifying what is not working
- Explaining why results occurred
- Applying lessons to improve implementation

What Is Organizational Learning?

Organizational learning occurs when knowledge from projects and experience is:

- Captured
- Shared
- Discussed
- Applied
- Integrated into policies
- Used to improve future programmes
- Retained beyond individual staff members

Project Learning vs Organizational Learning

Project Learning	Organizational Learning
Focuses on one project	Covers multiple projects and departments
Supports immediate improvement	Supports institutional improvement
Usually time-bound	Continuous and long term
Led by project teams	Shared across the organization
Improves implementation	Influences strategy and systems

Why Learning Matters

Effective learning helps organizations to:

- Improve programme quality
- Respond to changing conditions
- Reduce repeated mistakes
- Scale successful approaches
- Strengthen accountability
- Improve efficiency
- Support innovation
- Make evidence-based decisions

Consequences of Weak Learning

Without systematic learning:

- Mistakes are repeated
- Good practices are lost
- Evidence is underused
- Decisions rely on assumptions
- Projects fail to adapt
- Staff knowledge disappears when they leave
- Monitoring becomes a reporting exercise only

Characteristics of a Learning Organization

A learning organization:

- Encourages questions
- Values evidence
- Reflects regularly
- Accepts constructive criticism
- Shares lessons openly
- Learns from both success and failure
- Supports experimentation
- Tracks agreed learning actions

Creating a Learning Culture

A strong learning culture requires:

- Leadership support
- Psychological safety
- Time for reflection
- Open communication
- Access to evidence
- Shared responsibility
- Recognition of learning contributions
- Willingness to change

SECTION 1

Learning Questions & Learning Agendas

What Is a Learning Question?

A learning question identifies what the project needs to understand in order to improve decisions.

Examples

- Which outreach method reaches the most vulnerable households?
- Why are adolescent girls dropping out of the programme?
- Which training approach leads to sustained behaviour change?

Characteristics of Good Learning Questions

Good learning questions are:

- Relevant
- Specific
- Answerable
- Evidence-based
- Decision-oriented
- Time-bound
- Linked to programme priorities
- Important to stakeholders

Sources of Learning Questions

Learning questions may come from:

- Theory of Change assumptions
- Monitoring findings
- Evaluation recommendations
- Community feedback
- Implementation challenges
- Risk registers
- Donor priorities
- Staff observations
- Emerging opportunities

Types of Learning Questions

Implementation Questions

How well are activities being delivered?

Results Questions

Which approaches produce the strongest results?

Context Questions

How is the operating environment changing?

Strategy Questions

Should the programme approach be adjusted?

Example Learning Questions

Programme Area	Learning Question
Education	Which approach improves school attendance?
Health	Why are some communities not using health services?
Livelihoods	Which business-support package improves income most?
Protection	Which reporting channels are safest for women and girls?
Nutrition	What causes defaulting from treatment programmes?

What Is a Learning Agenda?

A learning agenda is a structured plan that identifies:

- Priority learning questions
- Evidence required
- Data sources
- Learning activities
- Responsible persons
- Timeline
- Intended users
- Expected decisions

Purpose of a Learning Agenda

A learning agenda helps organizations to:

- Focus learning priorities
- Avoid collecting unnecessary data
- Connect evidence to decisions
- Coordinate learning activities
- Assign responsibilities
- Track progress
- Share findings systematically

Components of a Learning Agenda

Component	Description
Learning question	What do we need to understand?
Rationale	Why is the question important?
Evidence source	Where will information come from?
Method	How will evidence be collected?
Responsibility	Who will lead the learning process?
Timeline	When will the question be addressed?
Use	What decision will the learning inform?

Prioritizing Learning Questions

Prioritize questions based on:

- Importance to programme decisions
- Risk level
- Urgency
- Evidence gap
- Stakeholder interest
- Feasibility
- Available resources
- Potential for programme improvement

Learning Agenda Example

Learning Question	Evidence Source	Timeline	Intended Use
Why is attendance declining?	Registers, FGDs, interviews	Quarter 2	Adjust outreach strategy
Which training method works best?	Pre/post-test and observation	Quarter 3	Revise training package
Are feedback channels accessible?	Feedback data and survey	Quarterly	Improve accountability system

SECTION 2

Learning-to-Action Discussions

What Is a Learning-to-Action Discussion?

A learning-to-action discussion is a structured meeting where teams:

- Review evidence
- Interpret findings
- Identify lessons
- Agree on decisions
- Assign actions
- Establish follow-up responsibilities

Learning-to-Action Process

- 1 Present evidence
- 2 Clarify findings
- 3 Identify patterns
- 4 Explore causes
- 5 Discuss implications
- 6 Identify options
- 7 Agree on actions
- 8 Assign responsibilities
- 9 Track progress

Questions for Learning-to-Action Discussions

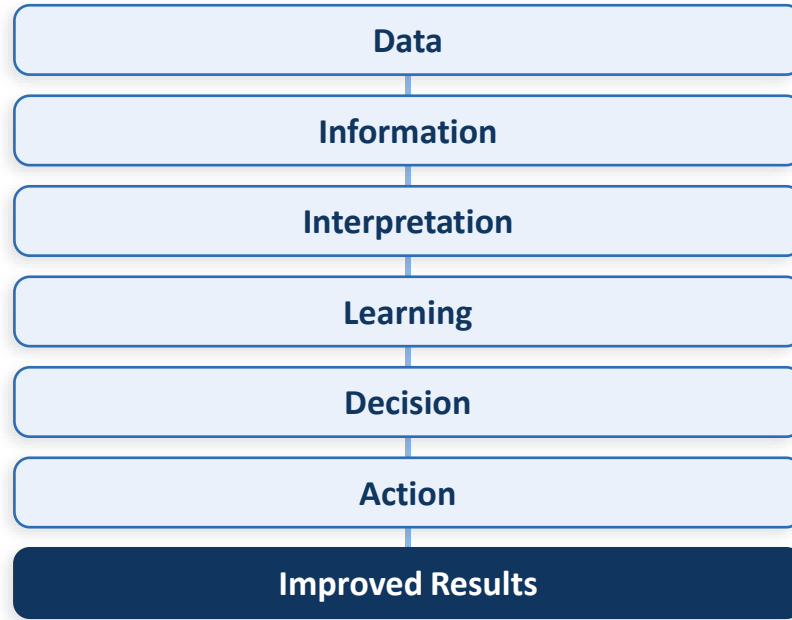
- What does the evidence show?
- What has changed?
- What is working well?
- What is not working?
- Why might this be happening?
- Who is affected differently?
- What should we continue?
- What should we change?
- What action is required?

Evidence Used in Learning Discussions

Evidence may include:

- Indicator results
- Monitoring reports
- Evaluation findings
- Community feedback
- Complaint trends
- Field observations
- Financial data
- Risk information
- Partner reports
- Staff experience

From Data to Action



Avoiding Data-Only Meetings

A weak review meeting focuses only on:

- Reading indicator results
- Explaining variances
- Reporting activities
- Listing challenges

A strong learning meeting asks:

- Why did this happen?
- What does it mean?
- What should change?
- Who will act?
- When will action be completed?

SECTION 3

Reflection Meetings

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What Is a Reflection Meeting?

A reflection meeting is a structured discussion that allows teams to:

- Review experience
- Analyze progress
- Identify challenges
- Share insights
- Agree on improvements
- Strengthen collective understanding

Purpose of Reflection Meetings

Reflection meetings help teams to:

- Understand implementation experience
- Compare evidence with expectations
- Discuss unintended results
- Examine assumptions
- Identify emerging risks
- Improve coordination
- Agree on corrective actions

Types of Reflection Meetings

- Monthly project review
- Quarterly learning review
- Mid-year reflection
- End-of-project reflection
- Thematic learning session
- Partner reflection meeting
- Community reflection meeting
- Management review meeting

Effective Reflection Questions

- What progress have we made?
- What surprised us?
- What worked better than expected?
- What did not work?
- What assumptions proved incorrect?
- What changed in the context?
- What should we do differently?
- What should we document and share?

Conditions for Effective Reflection

Reflection sessions require:

- Clear purpose
- Relevant evidence
- Inclusive participation
- Open discussion
- Skilled facilitation
- Respectful communication
- Adequate time
- Documented decisions

Common Reflection Meeting Mistakes

- Dominance by senior staff
- Blaming individuals
- No evidence presented
- No community perspective
- Repeating routine reports
- No decisions
- No action tracker
- No follow-up

SECTION 4

Pause-and-Reflect Sessions

What Is a Pause-and-Reflect Session?

A pause-and-reflect session is a deliberate break from implementation to:

- Review progress
- Examine assumptions
- Discuss emerging evidence
- Consider contextual changes
- Decide whether adaptation is needed

When to Pause and Reflect

Pause-and-reflect sessions are useful when:

- Results are below target
- Context changes significantly
- Major risks emerge
- Community feedback shows dissatisfaction
- Assumptions are challenged
- New opportunities arise
- A project reaches an important milestone

Pause-and-Reflect Agenda

1

Review objectives

2

Present current evidence

3

Compare planned and actual progress

4

Review assumptions and risks

5

Discuss stakeholder feedback

6

Identify lessons

7

Agree on adaptations

8

Assign and track actions

SECTION 5

After-Action Reviews

What Is an After-Action Review?

An After-Action Review is a structured discussion conducted after an activity, event or project phase.

It answers four questions:

- 1 What was expected to happen?
- 2 What actually happened?
- 3 Why was there a difference?
- 4 What should be done differently next time?

When to Conduct an After-Action Review

After-action reviews may be conducted after:

- Training events
- Distributions
- Assessments
- Emergency responses
- Monitoring visits
- Community meetings
- Campaigns
- Project milestones
- Evaluation exercises

After-Action Review Principles

An effective review should be:

- Timely
- Brief
- Participatory
- Evidence-based
- Non-blaming
- Action-oriented
- Documented
- Focused on improvement

After-Action Review Template

Question	Discussion
What was planned?	Expected objectives and approach
What happened?	Actual implementation and results
What worked?	Success factors
What did not work?	Challenges and gaps
Why?	Root causes
What should change?	Improvement actions

SECTION 6

Lessons Learned & Good Practices

What Is a Lesson Learned?

A lesson learned is knowledge gained from experience that can improve future decisions or implementation.

A strong lesson explains

- What happened
- Why it happened
- What was learned
- Where the lesson applies
- What should be done differently

Observation vs Lesson Learned

Observation

Community meetings had low attendance.

Lesson Learned

Scheduling meetings during market hours reduced participation. Future meetings should be planned after consulting community members on convenient times.

Characteristics of a Good Lesson

A good lesson is:

- Evidence-based
- Specific
- Practical
- Relevant
- Transferable
- Clearly written
- Linked to action
- Supported by context

Types of Lessons

- What worked
- What did not work
- Why results occurred
- What should be repeated
- What should be avoided
- What should be adapted
- What should be tested further

Documenting Lessons Learned

A lesson record may include:

- Context
- Activity or intervention
- Evidence
- Success or challenge
- Contributing factors
- Lesson
- Recommendation
- Potential users
- Follow-up action

What Is a Good Practice?

A good practice is an approach that has demonstrated positive results and may be replicated or adapted.

It should be

- Effective
- Evidence-based
- Relevant
- Ethical
- Sustainable
- Replicable
- Cost-conscious

Good Practice Documentation

Document:

- Problem addressed
- Intervention used
- Target group
- Implementation process
- Evidence of results
- Success factors
- Challenges
- Resource requirements
- Replication conditions

Scaling Good Practices

Before scaling a good practice, assess:

- Evidence strength
- Context similarity
- Cost
- Staff capacity
- Community acceptance
- Risks
- Sustainability
- Potential unintended effects

SECTION 7

Knowledge Management

What Is Knowledge Management?

Knowledge management is the systematic process of:

- Creating knowledge
- Capturing knowledge
- Organizing information
- Sharing learning
- Applying knowledge
- Preserving institutional memory

Types of Knowledge

Explicit Knowledge

- Reports
- Manuals
- Databases
- Guidance notes
- Policies
- Case studies

Tacit Knowledge

- Experience
- Skills
- Judgment
- Relationships
- Practical understanding

Knowledge Management Cycle



Knowledge Management Tools

- Shared digital libraries
- Learning briefs
- Case studies
- Lessons-learned databases
- Webinars
- Internal newsletters
- Staff handover notes
- Knowledge repositories
- Discussion forums
- Communities of practice

Common Knowledge Management Challenges

- Information stored in personal computers
- Poor file organization
- Limited documentation
- Staff turnover
- Weak knowledge-sharing culture
- Duplicate systems
- Outdated documents
- Limited access
- No ownership

Strengthening Institutional Memory

Organizations can strengthen institutional memory through:

- Standard file structures
- Staff handover procedures
- Central repositories
- Version control
- Documentation standards
- Learning briefs
- Exit interviews
- Knowledge-sharing sessions

SECTION 8

Communities of Practice

What Is a Community of Practice?

A Community of Practice is a group of people who share a professional interest and learn together through regular interaction.

Examples

- MEAL practitioners
- Safeguarding focal persons
- Project managers
- Education specialists
- Finance and compliance teams

Components of a Community of Practice

A strong Community of Practice has:

- Shared area of interest
- Active members
- Regular interaction
- Practical knowledge exchange
- Defined coordination
- Useful learning products
- Opportunities for peer support

Activities of a Community of Practice

- Peer discussions
- Case presentations
- Technical webinars
- Tool sharing
- Joint problem solving
- Mentoring
- Learning visits
- Good-practice documentation
- Review of emerging standards

Benefits of Communities of Practice

Communities of Practice can:

- Reduce professional isolation
- Spread practical knowledge
- Improve consistency
- Support innovation
- Strengthen staff capacity
- Solve recurring problems
- Encourage collaboration
- Preserve organizational knowledge

SECTION 9

Adaptive Management

What Is Adaptive Management?

Adaptive management is a structured approach to adjusting project decisions based on:

- Monitoring evidence
- Evaluation findings
- Community feedback
- Learning
- Context changes
- Risk information
- Implementation experience

Adaptive Management Is Not Improvisation

Adaptive management does not mean making uncontrolled changes.

It requires

- Evidence
- Consultation
- Risk assessment
- Clear decision making
- Approval
- Documentation
- Monitoring of results

Adaptive Management Cycle



Types of Adaptation

Operational Adaptation

Changes to schedules, staffing or delivery arrangements.

Tactical Adaptation

Changes to activities or implementation methods.

Strategic Adaptation

Changes to outcomes, assumptions, Theory of Change or overall strategy.

Triggers for Adaptation

Adaptation may be needed when:

- Indicators remain below target
- Context changes
- Risks increase
- Community feedback identifies barriers
- Assumptions prove incorrect
- Costs increase
- New evidence becomes available
- A better delivery approach is identified

Using Evidence for Course Correction

Course correction may involve:

- Revising activity schedules
- Changing outreach methods
- Reallocating resources
- Revising targeting
- Strengthening staff capacity
- Improving partner support
- Modifying communication
- Revising indicators or targets

Example of Course Correction

Evidence

Women's participation in livelihood training is below target.

Analysis

Training times conflict with childcare and household responsibilities.

Adaptation

- Adjust training schedules
- Provide childcare support
- Use community-based venues
- Monitor participation after the change

Adaptive Decision-Making Questions

Before adapting, ask:

- What evidence supports the change?
- Who will be affected?
- What risks may arise?
- Is donor approval required?
- Are resources available?
- How will success be measured?
- How will the change be documented?

SECTION 10

Updating the Theory of Change & Strategy

Learning and the Theory of Change

The Theory of Change should be reviewed when evidence shows that:

- Assumptions are incorrect
- Activities are not producing expected outputs
- Outputs are not leading to outcomes
- Context has changed
- New pathways to change have emerged
- Unintended results are occurring

Theory of Change Review Questions

- Is the problem analysis still valid?
- Are causal pathways still realistic?
- Are assumptions supported by evidence?
- Are external factors changing?
- Are activities reaching the intended groups?
- Are outcomes still achievable?
- What should be revised?

Updating the Project Strategy

Project strategy may be updated by changing:

- Activities
- Target groups
- Delivery methods
- Partnerships
- Geographic focus
- Resource allocation
- Risk mitigation measures
- Indicators
- Assumptions
- Expected outcomes

Documenting Strategic Adaptation

Record:

- Evidence reviewed
- Problem identified
- Proposed adaptation
- Stakeholders consulted
- Risks considered
- Approval obtained
- Resources required
- Expected result
- Monitoring plan

SECTION 11



Tracking Learning Actions

From Learning to Action

Learning has limited value unless it leads to action.

Every learning meeting should identify

- What must change
- Who is responsible
- Deadline
- Resources required
- Approval needed
- Expected result
- Follow-up date

Learning Action Tracker

Learning Finding	Agreed Action	Responsible Person	Deadline	Status
Low attendance	Revise outreach schedule	Project Officer	30 June	In progress
Delayed reporting	Introduce reporting calendar	MEAL Manager	15 July	Completed
Weak referral process	Update referral directory	Safeguarding Lead	20 July	Pending

Tracking Action Status

Use clear status categories:

- Not started
- In progress
- Completed
- Delayed
- Cancelled
- Requires escalation

Regularly review delayed or unresolved actions.

Accountability for Learning Actions

Management should ensure that:

- Actions are assigned
- Deadlines are realistic
- Resources are available
- Progress is reviewed
- Delays are escalated
- Completed actions are verified
- Results of adaptations are assessed

PRACTICAL EXERCISE

Conduct a Learning-to-Action Discussion

Practical Exercise

Conduct a Learning-to-Action Discussion

Participants will use sample monitoring data to:

- Identify performance patterns
- Interpret causes
- Develop learning statements
- Recommend adaptations
- Assign actions
- Establish follow-up arrangements

Exercise Scenario

A youth employment project reports:

- Training completion target:

90%

- Actual completion:

68%

- Female completion:

54%

- Male completion:

80%

- Job-placement target:

60%

- Actual placement:

35%

- Participant feedback identifies transport costs and unsuitable training schedules as major barriers

Exercise Step 1 — Review the Evidence

Discuss:

- Which indicators are below target?
- Which groups are most affected?
- What patterns are visible?
- What additional information is needed?
- Are there data-quality concerns?

Exercise Step 2 — Interpret the Findings

Ask:

- Why is completion low?
- Why are women more affected?
- What assumptions may be incorrect?
- Which contextual factors influence results?
- What programme practices may contribute to the problem?

Exercise Step 3 — Develop Learning Statements

Example:

Learning statement:

Training schedules and transport costs are limiting women's participation and completion.

A strong learning statement should explain:

- What the evidence shows
- Why the issue matters
- What may need to change

Exercise Step 4 — Agree on Adaptations

Possible adaptations:

- Adjust training schedules
- Provide transport support
- Select closer venues
- Offer flexible learning sessions
- Strengthen employer engagement
- Improve follow-up with participants

Exercise Step 5 — Prepare an Action Tracker

For each agreed action, identify:

- Responsible person
- Completion date
- Resources required
- Approval needed
- Monitoring indicator
- Follow-up date

Exercise Output

Each group should produce:

1

Summary of evidence

2

Key learning statements

3

Root-cause analysis

4

Recommended adaptations

5

Updated Theory of Change assumption

6

Learning action tracker

7

Follow-up plan

Group Presentation Questions

- Is the learning supported by evidence?
- Does the proposed adaptation address the root cause?
- Are responsible persons and timelines clear?
- Is donor approval required?
- How will the team know whether the adaptation worked?
- How will the lesson be shared?

CHAPTER REVIEW

Consolidating the Key Messages

Common Barriers to Learning

- Lack of time
- Fear of criticism
- Weak leadership support
- Poor documentation
- Limited access to evidence
- Staff turnover
- Departmental silos
- Learning without action
- Failure to track decisions

Good Learning Practice

Effective learning should be:

- Planned
- Participatory
- Evidence-based
- Honest
- Inclusive
- Action-oriented
- Documented
- Regularly reviewed

Chapter Summary

- Learning transforms evidence into programme improvement.
- Learning questions guide evidence collection.
- Learning agendas organize priority knowledge needs.
- Reflection and after-action reviews support collective learning.
- Lessons should explain what happened and what should change.
- Knowledge management protects institutional memory.
- Adaptive management uses evidence for course correction.
- The Theory of Change should be updated when assumptions change.
- Learning actions must be assigned and tracked.

Knowledge Check

1

What is the difference between project and organizational learning?

2

What makes a good learning question?

3

What is the purpose of a learning agenda?

4

What are the four questions of an After-Action Review?

5

How does an observation differ from a lesson learned?

6

What is adaptive management?

7

When should a Theory of Change be updated?

8

Why should learning actions be tracked?

Action Plan

Select one current project and identify:

- One priority learning question
- One learning activity
- One reflection mechanism
- One lesson that should be documented
- One adaptation that may be required
- One method for tracking learning actions

Key Message

Learning is complete only when evidence leads to action.



QUESTIONS & DISCUSSION

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Thank You

What will you adapt first based on the evidence?

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