

# LEARNING HISTORIES

*A handbook for an exciting experience*

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## **BACKGROUND**

### **Learning histories: learning from experience**

Capacity building in developing countries is a rewarding but often difficult task. Understanding how completed processes and projects have gone in organisations can offer guidance on how to approach new activities.

So we can learn a lot by taking the time to reflect on our experiences, but in practice it is often difficult to do this, because we're busy, or because people prefer to look forwards rather than back. Evaluation is not always the most inspiring part of a project. As a result opportunities are lost.

Drawing up a learning history takes this opportunity. It is a tool for learning from experience. A learning history gathers together the most important experiences of everyone in an organisation who was involved in particular activity. They explain in their own words how they perceived the process or project and their evaluation of it. This could be on successful cooperation with a partner in the field of humanitarian assistance, or a lobby campaign which did not go as well as hoped and where the organisation would like to understand why that was so. The individual experiences are recorded in a living document which provides the basis for group discussion and joint reflection: what can we learn from this? What can we take from this in terms of insight and ideas which we can apply to another activity?

A learning history is always a learning process. During the interviews people already develop new insights by relating what they experienced and looking back on it. Making a learning history therefore immediately provides suggestions for improvements.

### **The power of learning histories: organisations are made by people**

The power of learning histories is that they allow *everyone* who was involved in a process or project to speak, from manager to secretary. This gives a realistic picture of the process or project, rather than just a few opinions - including that of the senior management.

Modern organisations are dynamic. Many employees are involved in all sorts of change processes, new working methods and breakthroughs. Often they can say exactly what went well and what didn't. For example, that the success of the programme-based approach is due to the excellent cooperation with the partner organisation, or that the lobby campaign didn't get off the ground because the standpoint was not sufficiently clearly expressed. But this is only part of the story. It does not answer the question of *how* it happened. Learning histories does that. They offer a useful insight into the assumptions and reasons which led to a particular way in which people acted and thus the result of a process or programme. This can be very useful because this is what an organisation is about: people and their culture, background and personalities. In this way hidden knowledge is revealed and can be discussed.

### **History repeating itself?**

As the French say: 'L'histoire se repète.' This is not the case with learning histories. They mark the start of something new. Once the individual experiences of all the people involved are set down on paper, they provide the basis for an individual and collective perception of events. People can learn from this individually, as can the team and the whole organisation. This could lead to a new or different way of working. The key is in the joint reflection. In this way individual learning experiences can be anchored in the organisation as a whole. Everyone can benefit from the knowledge acquired and we can avoid making the same mistakes all over again and more often make smarter decisions instead.

### **Learning histories are real**

If we focus on people's personal experiences, they feel that their opinions matter.

They feel that they are taken seriously and that something is being done with their experience: it constitutes the start of a process of joint reflection and discussion.

Creating a learning history is therefore a learning process in itself. During the group process all the individual experiences and reflections told from each individual's own perspective and specialism, are brought together. The pieces of the puzzle fall into place. A complete picture is created of how something took place. The roles of everyone involved become clear. And what they can learn from it for the present and future. Learning histories are real because they are not based on theoretical models, but on life experience. This makes them practical and others can identify with them.

## APPROACH

### **Who for?**

Every PSO member organisation can apply to PSO to take part in a learning history project. All processes and projects are eligible, in principle. It doesn't matter whether they were successful or not. As long as we can learn something which is useful to the organisation or for the work. This is the most important criterion! Although there are a few conditions:

- It must be a completed process or project involving a specific product or change of direction. This is important to be able to delineate the learning history process in time and the number of people involved.
- There must be a sufficient number of people from the organisation involved in the learning history. This will make it worthwhile to draw up a learning history.
- We ask the organisation to include relevant organisations in the reconstruction by helping journalists to organise telephone interviews, interviews by e-mail or internet chat sessions;
- Finally, there must be sufficient support within the organisation for the idea of taking part in a learning history. People must feel that they can learn something from their experience.

### **Nine steps to a different beginning**

The learning history project as we envisage it will comprise nine steps in two phases. The first phase consists of individual meetings with the people involved in the process or programme. These may be employees of the organisation or of other organisations involved. These interviews will be free of value judgement. The person's experience is what counts. In other words: the discussion will not be steered in a particular direction, it will not be tidied up to make a neat story. No advice will be given on how these people could have done it differently. Nothing is good or bad. There will be no judgement. What we will be doing is portraying that person's experience, for each important event. How he or she looks back on that particular process or project? How did they view it initially? And how do they see it now? An

independent journalist will help the person to tell their own story and will record it word for word: in quotes.

The stories will reveal a picture of the course of the project or process. There will be things which will be striking. For example, that half of the project group ascribes the success of the lobby campaign to the formulation of a clear standpoint, while the other half believes that it actually has to do with the good and frequent contact with members of parliament. The journalist will record these observations. They will include no probing and detailed analysis by management or organisation consultants. They will be noted down by someone who can listen well and record what stood out for him or her in the conversations. This will ensure a clear overview of differences of opinion, or where views agree, problems, etc. The journalist will present the observations to a number of people within the organisation. The discussion arising from this will result in reflections. These reflections will also be included in the document. The first phase will end with a workshop for the organisation. The main questions will be: what have we learned from this? What can we do with it in our present and future activities?'

The second phase marks the start of collective reflection on the part of all PSO member organisations, based on an analysis of all the learning histories. This is the learning history project in outline. We will now look more closely at the nine steps.

### *First phase*

#### 1. Orientation

In the first meeting with the member organisation PSO will explain the learning histories concept. Representatives of the member organisation in turn will explain the process or project: what did it entail? During this phase we will look at whether the process or project offers sufficient material for a learning history and whether it meets all the conditions. At the same time a core team of enthusiastic people within the

organisation will be formed. They have important added value to offer because of their knowledge of the organisation and the process or project. The core team will be the contact point (e.g. for planning interviews), advisor (e.g. on how the interviews will be conducted: individually or in groups) and sounding board (e.g. for the reporting: is it recognisable to the organisation? Do the facts agree with what they know about the process or project?). Finally, the members of the core team will be ambassadors for the learning histories: they will talk about them with colleagues, so that the concept 'takes root' in the organisation.

During this meeting agreements will also be made about the choice of journalist and the time schedule.

## 2. Planning

During a second meeting, PSO will introduce the journalist who will compile the learning histories document. The key moments will be reviewed with the core team. These are the moments at which the process or project took a different turn. For example, the preparations, the start of the process or project, six months in which nothing happened, the first results, a new person who strengthened the team, etc. It is from these key moments that we can learn a lot. Why was it going so well at that time? What caused the change? What made the process or project collapse?

## 3. Interviews and research

The interviews with the people involved begin. As indicated, this centres on the individual perception of the employee. The main concern is how he or she experienced the project. A more detailed description of how to conduct interviews is given in the annexe for journalists. It is essential that everyone feels that they can speak freely. The journalist will write up the interviews for each key moment. He or she will also consult documents which were important to the process or project, such as newsletters, minutes of project meetings, policy documents, progress reports, etc. Based on the interviews and the literature, the journalist will reach a number of conclusions: what stood out to him or her? Which themes evoked the most discussion? What events led to success or failure? What actions lay behind this?

How can this be explained? The conclusions should be challenging to provoke a good discussion!

#### 4. Distillation

The journalist will discuss his or her conclusions with the core team. What does the core team think about them? The participants have an active role to play. The journalist will put direct questions to elicit feedback.

#### 5. Writing

The journalist will sit down behind the computer and write the learning history document. The interviews with employees and reflections of the core team will be recorded from each person's perspective. Factual events will be included separately from reflective comments. This separation of experiences and opinions will provide a crystal clear view of events and prompt further discussion. The accounts will be supplemented with suitable practical illustrations. This will lead to the creation of a 'collage' or 'scrapbook' which will allow people to develop their own picture. Quite a difference compared with a conventional evaluation report!

#### 6. Validation, fine tuning the document

Before publication the people interviewed will see their copy. Does it make sense to them? They will have the opportunity to comment or correct. This will ensure a reliable report of the conversation. A second check will be carried out with the core team during a separate meeting. PSO will take part in this meeting as an observer. The conclusions arising from the meeting will be included in the document. This marks the end of the journalist's involvement.

#### 7. Publication

PSO will publish the final version of the learning history document.

### 8. Follow up

During a workshop for the purpose of exchanging information, the people involved in the process or project and other interested parties from the organisation will conduct a discussion based on the document. What are the pitfalls and critical success factors that can be identified from the experiences? What should we be doing differently? How can the insight gained from the learning histories be used to increase our own capacity? The topic of this workshop will be focused on specific learning processes. PSO will organise this meeting.

### *Second phase*

### 9. Learning from each other

The collective reflection of the individual organisations marks the start of a meta-analysis. This study will be concerned with the use of the method in the individual organisations. The study will be carried out by an independent consultant. Based on this study, PSO will organise and facilitate a special meeting with all the member organisations to discuss this analysis together. Are the insights useful to other member organisations? How can they apply them in their own practice? How should we deal with learning histories in the future? These are some of the questions which will be raised during this meeting.

### **More information**

Surf to [www.pso.nl](http://www.pso.nl) to find more on the learning histories. Look under Knowledge Centre / Learning Trajectories / Learning Histories

## ANNEXE: FOR JOURNALISTS

### **Describing a process**

A learning history is a description of a process. It centres on the experiences and reflections of the people involved. That means that they decide on the story and that journalists should not try to create a nice, well rounded story from what they say, with a beginning, a middle and an end. The description of the process will be expressed in a journalistic style, i.e. with quotes from employees. This is the most objective way to record something. Although there must be no value judgement involved, the learning history document will also be read, since it will provide the starting point for a discussion. This means that it must be pleasant and easy to read (crisp writing style, active use of language, short sentences, no unnecessary waffle).

The learning history will be a collage of experiences. If the interviewee wants to illustrate his or her story with a photo or diagram which is representative of the situation, it will be included in the story. The 'scrapbook' nature of the document will make it more attractive as a learning history.

### **The format**

Besides a general factual description of the process or project, the learning histories document will consist of three columns. The right-hand column will contain a report on the experiences of the people interviewed. The left-hand column will contain the reflections of the core team, made during the distillation phase. 'In retrospect, we should have done this or that. In the end, this was a bad choice, because ...' The final column (below) will consist of the final conclusions arrived at during the final meeting with the core team. A visual depiction of the format is given on page 13.

### **The interviews: focus on the thinking process**

Learning histories are about the thinking process of the interviewee. This is what should be described. The interviews should be *reconstructive* in nature. The structure will be determined by the time path and key moments.

Following a general question about the course of the project in general, further questions will concentrate on the key moments. But the way in which this is done will determine the outcome. It requires an interview style which elicits experiences without judgement. Open questions, personal questions, sometimes being persistent, but always without being pedantic or defensive: what could you have done differently? Why didn't you take more responsibility yourself? Besides experiences, questions should also be used to probe the reflection (e.g. What do you think now when you look back on the start of the programme?).

Without setting out in detail what questions journalists should ask - the precise questions will always depend on the course of the discussion - we will illustrate the above with a few examples of questions.

- What, in your view, were the moments which determined the success (or failure) of the process/project (identifying key moments).
- Think about a number of situations where you thought that your role (or someone else's) in the project/process was most useful or not so useful. Please explain that (identifying key moment).
- What do you feel was the strength of the project/process?
- Why?
- What factors do you think were important to the success of the project/process?
- Why was that moment exciting?
- How do you look back on that moment?
- What did you think at the time?
- What made the process good or bad?
- How did you feel when the initial results were presented?

- Why do you think that?
- How did it come about that you ended up in a different position?
- How do you think other team members see that problem?

### **Reflections and conclusions**

Based on the interview and relevant literature (such as policy documents, newsletters, progress reports, etc.) the journalist should note whatever he or she finds striking. This could be matters which are often talked about, which are controversial, moments which were crucial to the success of the project, and which were due to a particular action or method. The conclusions will provide input for a meeting with the core team. The members of this team will talk about it and give their view of the conclusions. These reflections will be recorded together with the final conclusions arrived at during the meeting when the document is fine tuned.

## ANNEXE: EXAMPLE OF A LEARNING HISTORY

The example given below is fictitious. It is simply intended to illustrate what a learning history is.

### **Aid in Action: effective combination of emergency aid and long-term capacity building**

*For the last three years Aid in Action has combined emergency aid with long-term capacity building in Somalia. The essence of the work is working with local authorities and organisations, transferring activities to the Somali community and making Western consultants redundant. The results have been better than expected. Since Aid in Action began work three years ago with a few Western consultants, the organisation now comprises around 100 local staff who set up projects and run them in six provinces, increasingly without Western help. In the last year Somali development workers have also become less necessary. In two districts they have already withdrawn from healthcare centres which are now being run by local authorities, partner organisations and the local population. The contours of a lasting structure are beginning to emerge.*

*The method is new for Aid in Action. There were no ready-made techniques. At the start of the programme it was a matter of trial and error.*

<i>The key moment</i>	<i>The experience</i>
<p><b>The start</b></p> <p><i>Core team reflection</i></p> <p>'More talk or action? The management felt that too much time was wasted on talking, while the staff member didn't know what he should do once he was in Somalia. Both director and staff member still reached the same conclusion in the end: action turned out to be the best</p>	<p><b>The country director:</b></p> <p>'Emergency aid helps, of course. But the art is to organise it in such a way that long-term community processes are encouraged, such as self-reliance. Such an approach requires continuity in the aid provided. This idea, which I fully endorse, was the basic principle behind our programme in Somalia. A new way of working for Aid in Action. So we had to be pioneers. It was exciting. In the beginning we talked a lot about the approach. Too much, if you ask me. It did not produce much. We should have got on and done things instead much earlier. Then the results</p>

strategy!	would have been even better.'
<i>The key moment</i>	<i>The experience</i>
<b>The start</b>	<p><b>The Dutch development worker:</b>          'I was supposed to train Somali colleagues. I still remember it clearly. Three years ago I came here and found a country completely destroyed. I stood there and looked out over a sweeping landscape with bombed out houses. My courage sank into my boots. My Somali colleagues looked at me quizzically. 'We're going to get to work', I said. I had no idea how. In that respect there should have been better preparation. I felt that I had been thrown in at the deep end. At that moment I decided on the strategy: just get on with it and the structure will emerge of itself.'</p>
	<p><b>His Somali colleague:</b>          'This man was looking at me wide-eyed. He seemed rather helpless to me. I thought: Why are you here?'</p>

*Final conclusions of core team*

Talking is a good thing, but there should not be too much of it. Learning by doing is the best method for this new way of working. As shown by the good results of this programme in Somalia.