Spark Street Advisors
Data Driven Strategies

Learning Organizations

Theory And Practice

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Contents

Background

Learning is critical for organizations to adapt to changing environments, foster innovation, and respond to new opportunities. Many organizations claim to be 'learning organizations,' but the term can be vague and inconsistent, with varied interpretations. This report presents key concepts defining learning organizations, identifies processes and structures that organizations can put in place to facilitate learning, and explores how global organizations are deploying them in practice.

The report, developed based on a literature review and an organizational analysis, was originally commissioned by the Coalition for Epidemic Preparedness Innovations (CEPI) to help inform their approach to organizational learning.

Methodology and limitations

Part 1 ("Theoretical overview") is developed based on a literature review drawing upon 18 articles identified in the English language peer-reviewed and grey literature. We used a combination of the following search terms in the online databases EBSCO, PubMed, Google Scholar, and Google: "learning organizations," "learning systems," "organizational learning," "global health," "global development," "non-profit," and "philanthropy." We included articles, reports, checklists, and guidelines that defined key concepts, characteristics, functions, and tools associated with "learning organizations," with a focus on organizations in the global development field. We excluded literature that focused on training courses, teaching, or institutions like universities or schools. Intended as a rapid review, the literature review was not exhaustive nor based on a systematic search or review of the literature. The review was also conducted within a short timeframe and was restricted to English-language publications.

Part 2 ("Overview of practice") aims to better understand learning structures and tools in practice by identifying six global organizations, including Africa CDC; Gavi, the Vaccine Alliance (Gavi), the Global Fund to Fight AIDS, TB, and Malaria (Global Fund); the Bill and Melinda Gates Foundation (BMGF); the United Kingdom Foreign, Commonwealth and Development Office (FCDO) and its predecessor Department for International Development (DfIF); and Wellcome. We searched the organizations' websites and online resources to identify their organizational approach, tools, and mechanisms and how they support individual staff learning and development. We complemented and verified the initial findings through 45-60-minute interviews with organizational representatives. In terms of limitations, the review primarily relied on self-reporting from organizational websites and interviews. As such, we were not able to assess the quality of implementation. We also did not have access to internal documents, which could have added more granularity to the findings.

Part 1: Theoretical overview

Based on a literature review, this section provides an overview of the theoretical aspects of organizational learning. We define relevant key terms and describe a range of theoretical frameworks and tools for developing and strengthening learning organizations.

Definitions of key terms

Learning organization: An organization with structures and processes in place that enable staff members and teams to systematically engage in reflective practices, share knowledge, and apply new insights to improve performance and achieve organizational goals. Learning organizations are considered to be able to navigate, innovate, and thrive in complex and changing environments. [1,2,3,4]

Organizational knowledge: The common understanding of staff of organizational objectives and related measures.[5]

Organizational learning: A process by which an organization acquires, creates, shares, and applies knowledge to improve its performance, adapt to change, and achieve its goals. It involves individuals, teams, entire organizations, and oftentimes external partners engaging in activities such as collecting and analyzing data, experimenting with new approaches, sharing insights and best practices, and systematically integrating lessons learned into decision-making processes and practices.[6,9]

Culture of learning: An environment extending to all hierarchical levels of the organization that demonstrates and encourages individual and organizational learning, and where critical thinking, open communication, collaboration, and both gaining and sharing knowledge are valued.[7,8]

Learning strategy: A structured plan adopted by the organization to facilitate continuous learning and development at staff, team, organization, and cross-organization levels. It encompasses initiatives, resources, and processes designed to cultivate a culture of learning, skills, and competencies in alignment with organizational goals and objectives. The strategy is often accompanied by a monitoring framework to track progress.[9]

Learning agenda: A strategic document that identifies knowledge gaps through concrete questions and guides efforts to address them.[1] With a focus on a specific activity, program, or wider organizational strategy, it includes a set of questions directly related to the organization´s work (including intended impact) and a plan for learning activities to answer them, for example, through research, evaluation, or collaboration.[10,11]

Organizational learning

Rationale

In the context of growing pressure for funding and demonstrating accountability, purposeful learning is acknowledged as critical for increasing the impact of activities and value for money.[12, 13, 14, 15] Purposeful learning has been found to help organizations adapt to and navigate complex operational environments that are shaped by a rapidly growing volume of new evidence and data from a range of disciplines and perspectives.[12]

Learning happens at individual, team, organization, and cross-organization levels (figure 1)[9] and requires institutionalized structures that enable systematic approaches to using information.[11] Learning organizations are able to harness information systematically, continuously, and

Figure 1: Levels of learning

effectively to facilitate evidence-based decision-making that in turn, helps tailor interventions, products, and programs to different contexts and issues. A culture of learning also fosters staff commitment and performance, enforcing self-reliance and motivation to achieve organizational goals.[16,17]
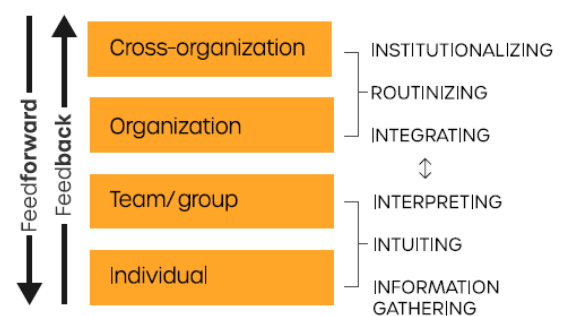
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[1] See USAID *Establishing a learning agenda* (2017) for further guidance

Organizational learning models

The literature reviewed uses a hierarchical model consisting of three "loops" to illustrate organizational learning. [9,5,6] *Single-loop* learning refers to making adjustments to existing organizational routines or processes to fix problems or improve efficiency without questioning the underlying assumptions. This approach is appropriate in stable environments. *Double-loop* learning goes further and questions the organization's initial goals, assumptions, and values that led to problematic practices and behaviors. It seeks to make more profound shifts in an organization´s objectives and policies. Finally, *triple-loop* learning, or "learning how to learn," focuses on improving learning itself, while also optimizing processes and behaviors. This learning type is associated with high performing organizations that have learning institutionalized in everyday processes and behaviors.[5,6,9] (See Annex 1 for further information, including examples of learning mechanisms that support each loop.)

Learning competencies

Classic organizational learning theory recognizes five competencies that need to evolve together to create a learning organization. First, learning depends on *self-management and staff development* with individuals striving for personal growth as part of their team. Second, it relies on *reshaping mental models* that are beliefs and assumptions influencing behavior, interactions, and decision-making. Third, learning as an organization requires *a shared vision that guides actions and decisions* as a collective. Fourth, learning is based on team learning that emphasizes collaboration and dialogue to enhance *collective intelligence*. And finally, bringing all the abovementioned together, systemic thinking views organizational learning as a holistic, interconnected system, in which different parts are operating together.[18]

Means of learning

According to the literature reviewed, organizations learn through a number of different means that can be categorized as follows:[9]

- **Learning through information** entails collecting, analyzing, deploying, and disseminating information.[9] Common sources of information include research, evaluation, performance measures, administrative, financial and cost data, survey statistics, analytical modeling, and community feedback that are used for routine or strategic decision-making, training, or advocacy.[9,11]

- **Learning through deliberation** entails dialogue and reflection to analyze links between the effectiveness of past actions and future actions. This helps contextualize problems and develop a collective understanding of solutions. Activities include, for example, stakeholder consultations, team meetings, research collaborations, communities of practice, training courses, and conferences taking place either in-person or through digital platforms.[9, 16,17]

- **Learning through action** refers to experiential learning from practice, including tasks and projects. It can occur individually or as a team through on-the-job mentoring, team learning, study tours, innovation "labs," pilot schemes and secondments, by "seeing how it is done" or "being shown how to do it." [9]

Enablers of learning

The literature reviewed described a number of elements associated with learning organizations with a caveat that no "one-size fits for all." The following enablers were identified. These can be framed as strategic, structural, professional, or operational[14] (see also Annex 2 and 3):

Strategic enablers:

- **Developing an overall learning strategy with shared vision, goals, and a monitoring framework** aligned with overall organizational goals and objectives.[9 16 15]

- **Defining a learning agenda** built around a set of questions directly related to the organization´s work, including intended impact, developed together with key stakeholders, and accompanied with an associated plan for learning activities to answer the questions, for example, through research, evaluation, or collaboration.[10,11]
- **Establishing clear accountability and responsibility for learning** and knowledge sharing across the staff,[13] and integrating them in individual performance appraisals.[16,15]
- **Regularly reviewing organizational structures, processes, internal and external relationships, performance and feedback systems**, and identifying ways to improve the work.[12]

Structural elements:

- **Establishing concrete processes and practices** within the organization for information generation, collection, interpretation, and dissemination to enable systematic knowledge sharing.[3]
- **Creating internal spaces and staff learning zones** for exchanging ideas and knowledge together or learn individually,[16] as well as invest in open learning days and informal social learning opportunities.[17]
- **Budgeting adequate financial resources** for staff capacities; data, monitoring and evaluation systems; research; knowledge sharing and related platforms, including stakeholder convenings and workshops; and potentially, for specialized units and human resources that lead the learning activities.[9,14]
- **Considering technology** where appropriate, for example, to help facilitate the information flow and access to learning platforms, while also weighting the investment against the development and running costs that can be high in the long term.[9]
- **Setting up clear rewards and incentives** for gaining new proficiencies.[16]

Professional elements:

- **Having the leadership** value learning, openness, and dialogue, be sensitive to local cultures of learning that vary across teams,[1,2,3,9,12] and make staff feel comfortable sharing their opinions and taking risks.[3,4,8]
- **Investing in individual learning**, including personalized, adaptive learning journeys tailored to a range of career paths at all levels of staff.[16,17]

Operational elements:

- **Fostering a culture of learning** across the organizations by actively questioning and listening, encouraging dialogue and debate, spending time on problem identification, reflection, and knowledge sharing,[1,2,12] and avoiding, where appropriate, consensus and groupthink.[13]
- **Drawing from research across disciplinaries**[14] and valuing multiple perspectives and alternative points of view to help think holistically and systematically.[3]
- **Communicating systematically** both internally and externally.[3]
- **Reinforcing learning with feedback, coaching, and peer-learning** opportunities across the organization.[17]
- **Leveraging external knowledge**, including by establishing participatory learning sites and communities of practice that can also solicit feedback from beneficiaries, formalizing collaborative relationships, and meeting with stakeholders with various expertise, such as with academia and policymakers.[3,9]
- **Reviewing or evaluating projects** after completion and sharing findings with others engaged in similar tasks[3] and conducting internal participatory evaluations to enable self-reflection.[12]

- **Allocating adequate time** to allow reflection, discussion, and learning[3,13] as well as staff and leaders to review the organization's processes both at the project and organizational level.[14,17]

Part 2: Overview of practice

To better understand structures, tools, and practices global health organizations have in place for learning, this section provides key findings of a review of six global organizations (Africa CDC; Gavi, the Global Fund, the BMGF, FCDO and its predecessor DfID, and Wellcome). The organizations were found to have a broad range of elements in place to facilitate organizational learning (see Annex 4 for a summary table).

Learning strategies or frameworks

Most organizations reviewed link learning to Monitoring and Evaluation (M&E) activities, referencing learning in their M&E frameworks (2/6), strategies (2/6), or policies (3/6). Gavi is the only organization with a dedicated learning strategy[19] which describes a "system-wide approach" to learning that spans from the identification of learning needs to generating and using evidence to informing decision-making, planning, and performance management (Annex 5). Gavi's evaluation policy[20] also explicitly links learning to operational and strategic decision-making.

The Global Fund has integrated learning into its M&E Framework,[21] which describes various components (strategic monitoring, strategic and thematic evaluation, programmatic monitoring, secretariat monitoring) and how each component facilitates learning (Annex 6). The FCDO Evaluation Strategy[22] also describes its learning approach, albeit in less detail, referring to learning as "fundamental to the quality, impact, and value for money." Wellcome is currently developing a learning framework that will describe the "learning pipeline" from hypotheses to monitorable actions as well as roles, responsibilities, and tools different teams use.

Content of learnings

Gavi, the Global Fund, and the BMGF purposefully set out learning agendas. On an annual basis, Gavi defines learning priorities to reflect perceived "critical knowledge gaps" that would "improve impact."[2] Gavi then develops a learning agenda that aims to define questions related to the gaps, activities for answering those questions, and approaches to sharing findings.

The Global Fund follows a similar but less frequent approach. Aligned with the organizational 5-year strategy development cycle, it defines ten thematic priorities in consultation with key stakeholders (e.g., "*what do we want to know by 2028*?"). Answering the questions relies on existing routine data collection to the extent possible "so as not to burden funding recipients with new data requirements."

The BMGF does not have an organization-wide learning agenda, but divisions and teams can develop their own. For example, the learning agenda for Global Policy Advocacy is built around its *Theory of Influence* and focuses on the BMGF tactics (e.g., advocacy, coalition building, champions) to generate outcomes (i.e., policy, financing). The BMGF learning agenda questions are focused on how to strengthen the influence of these tactics (e.g., *what are the key criteria for coalition building? What are the characteristics of effective champions?*). Findings are then translated into staff guidance.

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[2] For example, zero-dose children and missed communities: Who and where they are? What are the effective strategies to reach them? How do Gavi's investments in innovation contribute to identifying, reaching and monitoring them?

FCDO does not develop a learning agenda as such, but as it conducts "evaluations for learning," the evaluation plan serves as an agenda for learning. We did not identify learning agendas for either Wellcome or the Africa CDC.

Generation and sharing of learnings

Gavi, the Global Fund, and FCDO have extensive monitoring systems that include continuous monitoring of programs, team performance, financing, and partnerships through key performance indicators (KPIs). These are regularly reviewed by senior leadership. Africa CDC is currently developing an overall M&E framework and it already has ones for specific programs.

These organizations also conduct ad hoc reviews, assessments, strategic analyses, and risk and assurance reports internally or through external commissions. In addition, they regularly conduct evaluations to fill evidence gaps in areas that cannot be routinely monitored. Reports are made public, and findings are summarized in briefs and PowerPoints and shared with relevant stakeholders.

Neither Wellcome nor the BMGF have organization-wide KPIs. They do, however, selectively commission evaluations. Wellcome's primary emphasis is on encouraging its grantees to conduct reviews and share lessons throughout and at the end of projects. The BMGF uses evaluations primarily to learn from pilots and innovations.

Publishing, training, and communities of practice

All organizations publish and communicate evidence and learning through reports, guidance, events, and articles and through their websites, meetings, and convenings. Africa CDC, Gavi, the Global Fund, and FCDO, also provide online training courses accessible to internal and external audiences. Topics range from grant management to ethics to technical areas, such as disease prevention and health systems strengthening. Africa CDC, Gavi, and the Global Fund also manage learning networks and communities of practice to share information and learnings on specific topics with external stakeholders.

To facilitate internal learning, in addition to training courses, all organizations use intranet and regular leadership and broader staff meetings (e.g., monthly virtual town hall meetings) as platforms for knowledge sharing. The BMGF intranet includes a "learning sessions repository," where each session includes a video, related publications and guidance with summaries, and contact information of internal experts for further guidance. The Global Fund intranet contains news, articles, staff profiles, and a calendar with key events, including learning opportunities.

Collecting feedback: **Shifting the emphasis from quantitative toward qualitative data**. Some organization are refining their feedback collection practices to increase analyzability and relevance:

- Wellcome conducts interviews with grantees and partners to obtain more meaningful and usable information.

- The Global Fund used to systematically collect post-training feedback from all participants via online surveys, however, the findings were not meaningful and thus not used. It has replaced this approach with 2-open-ended-question interviews right after the training to get strategic and in-depth data.

Learning structures

All six organizations have staff dedicated to learning. At Gavi, there is a Measurement, Evaluation, and Learning Unit; at the Global Fund, there is an Evaluation and Learning Office; and at the FCDO, an Evaluation Unit. These structures oversee M&E of strategy, programs, and other initiatives, manage data and research, and are tasked with sharing knowledge and learning with other teams.

While not specific to "learning," Africa CDC's Planning, Reporting, and Accountability Division is tasked with staff development, managing communities of practice, and fostering the "culture which drives and encourages high performance, collaboration, agility, and accountability." At Wellcome, the Equity, Diversity, and Inclusion team is also responsible for sharing learnings and insights. While the BMGF dismantled its central M&E team in 2015, currently, M&E experts are embedded in each division.

Evaluations

Gavi, the Global Fund, and FCDO have an external structure that provides oversight of the function. Gavi's Independent Evaluation Panel and the Global Fund's Evaluation Advisory Committee serve as standing committees that report to the Board on quality and independence. FCDO has an internal Evaluation Unit that supports the implementation of the Monitoring, Evaluation, and Learning plan as well as an Independent Commission for Aid Impact, an independent body reviewing all UK aid funded by FCDO. We did not identify external evaluation structures for Africa CDC, the BMGF, or Wellcome.

The Global Fund also sets up internal user groups that are cross-organizational teams and shadow the evaluation process from inception to dissemination. The aim is to enhance feedback loops and staff ownership of evaluation findings.

Individual learning plans

Gavi, the Global Fund, and FCDO integrate learning into individual performance plans. For example, at the Global Fund, all staff members develop personal learning objectives that are reviewed as part of the annual performance appraisal. Africa CDC lists "learning orientation" as a core competency in job descriptions. Where warranted, these organizations pay for staff training courses or workshops.

Wellcome supports opportunities for hands-on practical experience through secondments, job swaps, mentoring, and internal promotions as well as provides career coaching and CV workshops to support professional development. At FCDO, staff have up to 5 days per year of paid learning days and the Global Fund, where justified, also allows for unpaid study leave.

Key takeaways

The six organizations reviewed each have developed learning structures, tools, and practices to varying degrees. However, given the range of organizational mandates, activities, staffing, funding levels, and existing M&E and other systems, how learning is operationalized differs significantly.

Gavi is the only organization reviewed with a dedicated learning strategy. The strategy is helpful in clarifying the sources of evidence and learning processes, applications, and fora, enabling an organization-wide approach to learning.

Takeaway: The strategy development process helps an organization understand and improve learning as a system, however, organizations with limited resources may find a lighter touch, evidence-informed plan a sufficient starting point.

The Global Fund's M&E framework describes well how different M&E components facilitate learning and how and for what purposes information is used.

Takeaway: Move beyond describing how information is collected to demonstrating how it will be used.

Developing a learning agenda, as done by Gavi, the Global Fund, and the BMGF, can guide learning in a range of areas, from program priorities to operational practices. The development frequency is an important consideration and should be aligned with key strategic moments, such as annual or mid-term reviews.

Takeaway: Set an explicit learning agenda aligned with strategic decision-making moments.

Among the organizations reviewed, there was no one way for generating or sharing learning, including from M&E. While some organizations collect a lot of data, it is unclear how it is used.

Takeaway: Focus data collection on what is meaningful and necessary and make clear its use prior to collection.

All organizations reviewed support internal knowledge exchange, including through training, staff meetings, and virtual platforms.

Takeaway: A well-functioning intranet (e.g., as by the Global Fund, Wellcome, and BMGF) can provide systematic access to useful information and tools. However, as content development and maintenance are costly, benefits should be weighed against costs.

All organizations support individualized learning. This is reflected in individual performance plans, job descriptions, opportunities for paid training and workshops, and to a lesser extent, job swabs, mentoring, secondments, and unpaid study leave.

Takeaway: Support for individual learning is critical and should be offered in various forms/formats.

Conclusion

This report summarizes our findings based on a literature review of theoretical aspects of organizational learning, as well as an analysis of six global health organizations that apply a range of strategies and tools for learning.

Many organizations focus their learning activities on monitoring and evaluation; however, while a starting point, learning is also about how the information is used to change organizational and individual behaviors. Furthermore, learning requires an adequate budget for staffing, staff capacities, systems, and activities. What is "adequate," however, depends on the organization, its goals, scope, existing system, and staff capacities. More is not always better: understanding what data and evidence are collected and how it is used is critical and the focus should be on gathering meaningful, actionable insights. Finally, organizations should consider how to best invest in technology as it is not the panacea: while appropriate technology can facilitate information flows, it is not sufficient on its own to drive change.

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Annexes

Annex 1. Examples of learning mechanisms

Examples of learning mechanisms, mapped to the means of learning and the learning loops that they support.[23]
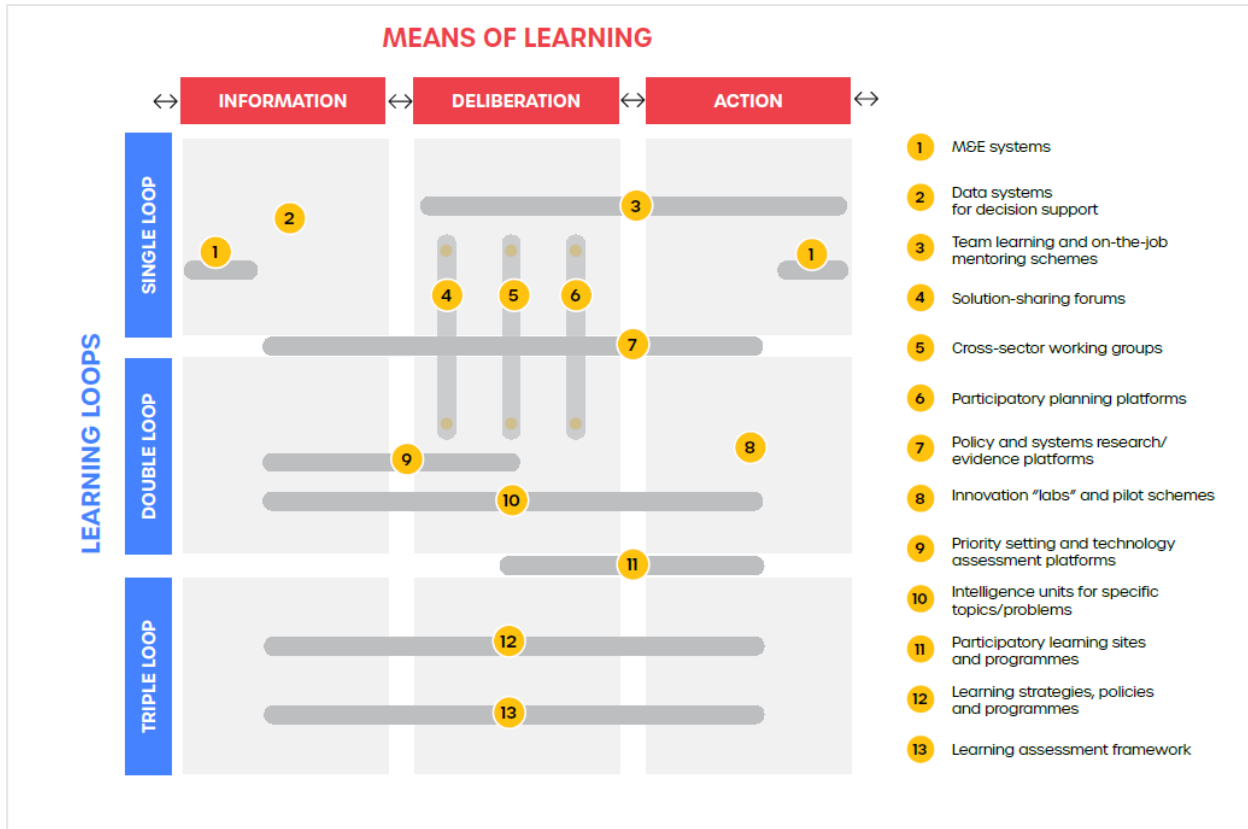
Source: Sheikh K & Abimbola S. Learning Health Systems: Pathways to Progress. Alliance for Health Policy and Systems Research; 2021, p.40.

Annex 2. Examples of elements of learning

The table below describes elements of learning fitted to both dynamic and stable working environments.

The learning and development function must strike a balance between stability and dynamism.

	Dynamism	Stability
Strategy	● Continually assess the capability needs of the organization; align learning priorities accordingly ● Regularly shift budgets and people to address priority needs, based on value ● Measure and review key performance indicators daily and weekly; take action where needed	● Articulate a clear vision and mandate for the learning function ● Develop an integrated learning strategy that includes a budget and digital-learning road map ● Ensure standardized and transparent metrics—some should be jointly owned with the businesses and focused on value creation
Structure	● Establish an internally shared pool of resources that can "flow to work" ● Cultivate internal and external learning networks and partners in key areas (eg, design, content, delivery, technology) ● Facilitate mobility within the learning organization to encourage continuous development and knowledge sharing	● Establish multilevel governance on business imperatives, not business units ● Ensure a simple organizational structure that has clearly delineated accountabilities (eg, by function, business unit, or content area/learning journey) ● Formulate clear and transparent roles and responsibilities
People	● Plan resources and reserve capacity for irregular demand cycles ● Cultivate a culture of continuous improvement ● Integrate agile coaches to support new ways of working	● Develop internal capabilities in value-adding specializations (eg, strong functional design expertise) ● Ensure knowledge sharing; reduce unwanted attrition by recognizing employees' contributions ● Build trust, accountability, and professionalism in the learning function
Processes	● Establish cross-functional project teams that have end-to-end ownership and decision-making authority ● Work in iterative sprints with rapid learning and improvement cycles, focusing on modularized content ● Regularly review the efficiency and effectiveness of processes; adapt when required	● Automate data-gathering and administrative tasks ● Standardize handovers across teams and departments ● Adopt consistent templates for learning design and curriculum
Tech/systems	● Build Learning Record Store capabilities to support algorithmic and artificial-intelligence-based recommendations and decisions ● Leverage partnerships with learning providers to ensure cutting-edge delivery capabilities (immersive, adaptive, and multimodal) ● Adopt an innovation/R&D agenda that promotes continuous product improvement	● Maintain a dashboard that gives a clear overview of resource allocation and project intake ● Enforce a standardized content-management system to avoid duplication and overlap ● Integrate learning-and-development systems with others in the organization; avoid manual work-arounds

Source: Chen Nielsen N, Dotiwala F, Murray M. A transformation of the learning function: Why it should learn new ways. McKinsey & Company, 2020.

Annex 3. Example of learning framework

DFID framework describing nine factors that contribute to good organizational learning:

Culture and Leadership	Skills and Capabilities	Tools and Systems
Learning as a strategic investment: *Be clear this is a corporate priority and will help the organization maximise its impact* *Invest time and resources to support organisational learning and track improvements*	**Engagement & commitment:** *This is everyone's responsibility Positive recognition for those doing it well* *Build staff capability: to use evidence and know how, to apply collaborative learning practices and help others to do this* *Surge support*	**Evidence based decision making:** *Be clear on evidence used to inform decisions (knowledge and know-how)* *Watch out for optimism bias, and be clear when we don't have enough evidence* *Identify and target priority gaps*
Stakeholder involvement: *Involve a wide range of partners in our learning efforts – learn from them, share what we learn, joint approaches* *Avoid group think: diversity, external challenge.*	**Making it safe to learn:** *Protect time & space for learning* *Encourage people to talk about what's not working as well as what is. Learn from mistakes, don't just move on*	**Learning is embedded in the delivery process:** *Systematic not sporadic Requires collective effort New ways of working*
Leadership role modelling: *Open debates* *Ask the questions: What have you learnt? Have you shared this? What don't you know? How can we help?*	**Learning in connected networks:** *Connections not collections: communities of practice (internal and external)* *Build demand not just supply Iterative approaches*	**Systems for capturing and sharing lessons:** *Primary focus on people/networks* *Fit for purpose technology (support collaborative working, smart searching, portfolio data, institutional memory)*

Source: UK Department for International Development. DFID –a Learning Organisation. PowerPoint Presentation; 2014.

Annex 4. Summary table of the organizations reviewed

| Organization	Approach to learning		Mechanisms and tools			Structures		Key takeaways
	Key documents	Focus	Design and prioritization	Knowledge generation	Knowledge sharing	Dedicated learning function	Incentives	
Africa CDC	Africa CDC Strategic Plan 2023 – 2027[23]	Recognizes networks of professionals which it manages as key for fostering continuous learning and innovations. Five regional collaborating centers serve as hubs to facilitate learning and knowledge exchange close to countries. With the new strategy, seeks to transition from ad hoc planning and performance management to more systematic planning, monitoring, and evaluation of teams, divisions, and objectives.	Overall strategy guides the activities. Currently, is in a process of enhancing evidence-based decision-making by developing an overall MEL framework. MEL plans developed for specific programs (eg, Covid work).	Develops articles, manuals, guidance, frameworks, and weekly epidemic intelligence reports.	Maintains a website with extensive resources, including data, updates, reports, speeches, and guidance. Publishes a journal. The website also includes a training database. Manages RILSNET, a network of public health institutes, academia, laboratories, NGOs that shares data and learnings among its members as well as Africa CDC Learn network that provides access to communities of practice, training courses, and webinars.	Planning, Reporting, and Accountability Division leads system-wide monitoring, data management, staff development, and fosters "culture which drives and encourages high performance, collaboration, agility and accountability." Knowledge Management oversees dissemination and use of knowledge resources and communities of practice.	Currently develops a system to shift staff learning from one-off training to comprehensive learner-centric programs and integrating learning to performance management	In a process of developing a comprehensive system-wide approach to MEL and staff learning. "Learning orientation" listed as a core competency in job descriptions. Networks and communities of practice which it manages offer an opportunity to effectively share learning with external audiences.
Gavi, the vaccine alliance	Specific Learning System Strategy[19] developed to accompany the organizational strategy (2022)	Recognizes learning to "enable the use of evidence to strengthen the delivery of Gavi's strategies, policies, and programs." The strategy defines a "learning system" that helps identify priority learning needs, provide evidence to answer them, and act on the results, allowing for "faster course correction, scaling of	Develops theories of change for all policies and strategies going to the PCC and Board approval. Defines learning priorities (LPs) that are updated annually as required and accompanied with a learning agenda that outlines a set of questions addressing critical knowledge gaps (aligned with LPs);	Extensive M&E efforts. Aligned with Measurement Framework that includes KPIs, monitors programs, team performance, and partnerships. Conducts annual portfolio reviews, centralized and de-centralized evaluations, annual risk & assurance reports, strategic analyses, audits, investigations, and program capacity assessments (PCA), and other types of assessments and surveys for targeted learning. Has	Maintains a website with publications and other resources and an organization-wide learning portal with eLearning modules. Supports Zero-dose Learning Hubs implemented by local organizations in priority countries for in-depth M&E and research.	Evaluation and Learning Unit is embedded within the Secretariat. Sets up staff cross-team working groups to share knowledge. Evaluation Advisory Committee, consisting of independent and Board members supports the Board to manage evaluations.	Through Review and Performance Management processes, financing to support learning activities	A comprehensive approach to learning through a dedicated strategy that articulates relevant learning activities throughout the business cycle. The strategy may not change the activities conducted as such but, by bringing different elements together, guides and helps envision how organizational learning takes place.

		best practices and innovations, and enabling cross-Alliance learning."	associated activities to answer them; and approaches to sharing findings to enable use.	an evaluation policy. Research focuses on implementation research.				
Global Fund to Fight AIDS, TB, Malaria	M&E framework 2023-28[21] incorporates learning, describing how M&E components facilitate learning	Recognizes learning in the context of M&E, that contributes to "improved efficiency, effectiveness, quality, and impact of Global Fund investments." The M&E framework describes how learning is assured through M&E activities.	The strategy development process included defining a Theory of Change and a learning agenda, which was developed with key stakeholders. The agenda includes 10 thematic areas for evaluation within the strategic period.	Extensive M&E efforts. Monitors impact, strategic, and financial KPIs, country programs, including of investment performance, and the Secretariat performance. Conducts Strategic & Thematic Evaluation based on a Multi-Year Evaluation Calendar to fill evidence gaps in areas that cannot be routinely monitored. Assesses also M&E/data systems in countries.	Maintains a website with publications, including all reports and evaluations available. Has also an extensive iLearn platform with courses for applicants, civil society, and others.	The evaluation and Learning Office led by the Chief Evaluation and Learning Officer is embedded in the Office of the Executive Director. Evaluation is overseen by an Independent Evaluation Panel (IEP) that is accountable to the Board.	Through performance management, financing to support learning activities	Learning is articulated mostly in the context of M&E through clear definitions of how each M&E product/activity facilitates learning. Has developed extensive learning resources (technical courses), with an emphasis on partner learning.
The Bill and Melinda Gates Foundation	Only internal documents	Learning is not explicitly defined but has committed to "actionable measurement as a guiding philosophy" since 2008.	Develops individual strategies for each program area (>30). Defines goals and strategies, MEL frameworks, and learning agendas closely with partners for specific themes/programs. Policy advocacy has a learning agenda aligned with the division´s Theory of Influence to help define the influence of the activities BMGF conducts.	Collects and shares data on progress, reflects on lessons learned, and makes course corrections as needed. Uses evaluations as a collaborative learning tool, however, selectively to learn from pilots and innovations. Recognizing the diversity of partners, seeks to keep M&E light not to distract with measuring and reporting requirements at every step of implementation. There is no systematic mechanism to draw learnings from investments based on the self-reporting of a responsible staff member on activities and outcomes.	Has an open access policy to ensure the research it supports is publicly available. Supports partners to share learnings, the website includes some resources (e.g., grant documents and financial data). Intranet includes extensive resources for staff learning, including a repository for learning sessions.	Until 2015, there was a central MEL team that helped mainstream and standardize MEL and its guidance. Currently, each division has its own focal points.	Financing to support learning activities	Emphasizes working closely with partners, recognizing that one size does not fit for all. While oriented to measuring results, avoids distracting partners with heavy M&E. Learning agenda developed around activities, including their influence on policy and financing. Has an appetite for risk and is keen on investing in new approaches. Open Access Policy commits partners to ensuring research findings are publicly available.

UK FCDO/DFiD	The Independent Commission for Aid Impact (ICAI) conducted reviews on organizational learning (2014, 2019). Currently referred to in the Evaluation Strategy.[22]	Recognizes learning as "fundamental to the quality, impact, and value for money." Associated with evaluation ("evaluation for learning") that is one of the key outcomes of the Evaluation strategy (2023). More recently, learning is implicit also in the systems thinking approach that includes principles for organizational behaviors resembling building a culture of learning.	Programs funded based on a thorough business case that includes theory of change.	Develops an annual MEL plan. Evidence generated through situation analyses, program and portfolio monitoring, financial and risk management, and research. Evaluates programs, policies, portfolios, themes or strategic areas for "learning and/or accountability purposes." Has an evaluation strategy and policy.	Offers online learning courses and materials for staff, partners, and others. Invest in staff development extensively, including through professional development conferences and training. Has an Academy for all staff to develop expertise and learn from each other. Previously, DFID organized training, advisory services, and helpdesk, maintained networks, communities of practice, and "technical professional groups," and had >100 secondees in other departments.	Evaluation Unit (EvU) within the FCDO supports implementation of the MEL plan. The Independent Commission for Aid Impact (ICAI), funded by FCDO, is an independent body reviewing all UK aid.	Through performance management, learning days (min. 5/year), financing to support learning	Learning more explicit in DFID resources than those by FCDO. Currently, learning is embedded in the evaluation strategy (2023), "evaluation for learning," with structures supporting the MEL. To some extent, systems thinking guidance implies building a culture of learning through principles for organizational behaviors. Some years back, ICAI developed a methodology to assess learning from investments, assessing the extent to which information is used to influence decisions and how learning takes place.
Wellcome	Only internal documents	Associated with research culture and to some extent commitment to equity, diversity, and inclusion that is considered to drive "different, creative, and fresh ways of thinking." The Discovery Research program funds "curiosity-based ideas," emphasizing "creative environments" and an "inclusive research culture" that resembles building a culture of learning.	Develops a learning framework outlining the "learning pipeline" from hypotheses to monitorable actions, with a description of responsibilities, roles, and tools different teams use. Does not have MEL framework or KPIs. During Covid, launched an organization-wide initiative to repurpose evaluations through a light but systematic learning agenda development process.	Developed an organization-wide system to draw data and learnings from its investments that also helps identify synergies across programs and partners. Uses machine learning to extract data from publications. Funds research. Supports partners in evaluating projects and, to that end, has developed non-prescriptive evaluation guidelines. Encourages sharing lessons during and at the end of the project, including by using a variety of mediums.	Offers courses, talks, consultations, and workshops. Internally, supports opportunities for hands-on practical experience through secondments, job swaps, mentoring, and internal promotions. Also, has invested in career coaching, and CV workshops to support professional development.	Digital Delivery team has designed and helped set-up an internal system to learn from investment. A People Capability Planning Manager sits in the HR ("People" department). Equity, Diversity, and Inclusion team includes sharing learning & insight function.	Financing to support learning activities, allows research leaves.	Implies to learning in the contexts of discovery research and equity, diversity, and inclusivity that both foster a culture of learning. Is in a process of setting up an organization-wide "impact measurement" system to learn from investments that helps identify synergies across programs and partners. Uses AI to extract useful data from publications and reports. As no donor reporting requirement, is free to develop MEL system as it sees fit.

Annex 5. Gavi Learning System Approach and Theory of Change

As part of the Learning System Strategy, Gavi has developed a Theory of Change for its learning. Although complex, it has helped Gavi define the areas to systematically work on.

According to the Multilateral Organisations Performance Assessment Network (MOPAN) assessment (2024), the strategy, together with the Evaluation Policy and the Gavi 5.0 Measurement Framework, has provided guidance for staff to utilize results for decision-making, develop learning agendas, and plan and implement evaluations.
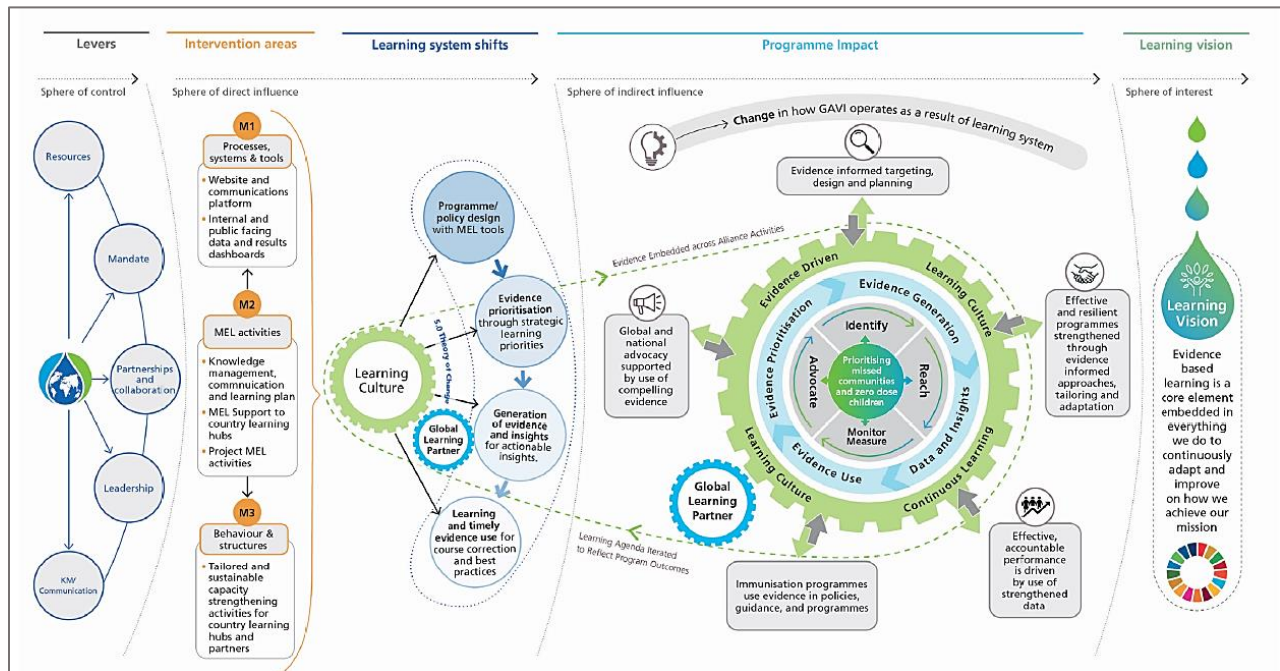
Source: Gavi. Learning System Strategy; 2022. Accessed March 2, 2024.
https://www.gavi.org/sites/default/files/about/Strategy/LSS.pdf

Annex 6. Learning within the Global Fund M&E Framework

The Global Fund's approach to learning is focused on M&E activities. Intended to facilitate learning, the M&E framework clearly outlines the learning components:

Annex 1: Details of the M&E Framework components

Component	What is it?	How does it drive data use and facilitate learning?
Strategic Monitoring	Routine data collation, aggregation, and/ or analysis involved in generating key insights related to high-level Strategy performance through: Board-approved Key Performance Indicators (KPI) Framework for the 2023-2028 Strategy, consisting of three tiers: 1) **Impact KPIs**, which measure progress towards high-level aggregate epidemiologic outcomes of the partnership's efforts to end the three diseases aligned with the investment case. Selection of these metrics is overseen by the Strategy Committee, while data for reporting on these KPIs come from Technical Partner reports. 2) **Strategy KPIs**, which measure progress towards achieving the outcomes of the 2023-2028 Strategy Goal and Objectives. Overseen by the Strategy Committee and developed through the Measurement Consultation process. Data for reporting on these KPIs come from both Program and Secretariat Monitoring or from technical partners. 3) **Financial KPIs**, which track a focused set of financial indicators aligned with the Corporate Financial Report. Selection of these metrics is overseen by the Audit & Finance Committee, while data for reporting on these KPIs come from Program and (mainly) Secretariat Monitoring. The KPI Framework has a strong influence and steer on the content of Program and Secretariat Monitoring, so that data is consistently available to report on the KPIs through these components to the greatest extent possible. Additional complementary insights from Program and/or Secretariat Monitoring may also be shown alongside the KPIs to provide further contextual information around the drivers of observed performance.	Monitoring progress towards achieving the goals and objectives of the Strategy to enable high-level oversight of strategy implementation through: • **Strategic oversight and decision-making** using bi-annual Strategic Performance Reports, which are reported to Governance bodies and MEC to enable them to perform their respective oversight roles and to provide steer related to Strategy delivery. By identifying areas of strong and poor performance, Strategic Performance Reports flag where progress against targets is off track which requires response and action by the Secretariat but also, depending on the issue, the wider partnership. • **Program and/ or Secretariat oversight and decision-making**, as specific Strategic Performance Report findings trigger further portfolio analysis, deep dives, and reviews that draw from more data and cascade to related responsible parties described above. These findings also inform learning needs for independent evaluation consideration.
Strategic & Thematic Evaluation	Independent vehicle used for the purpose of generating learnings to (i) support improvements in the performance of Global investments (ii) support improvements in the Global Fund business model to deliver on the Strategy goals and objectives and (iii) to provide independent assurance on programmatic progress or lack thereof. Expressed through:	Evaluating progress towards achieving the goals and objectives of the Strategy to enable high-level oversight of strategy implementation through: • **Strategic oversight and decision-making** using Strategic and Thematic Evaluation reports upon evaluation conclusion and related key findings incorporated where relevant into bi-
Secretariat Monitoring	Data generation and analysis conducted by Secretariat teams across all functional areas, drawing from both data generated through Program Monitoring and internal data systems. A subset of this data is expressed through: • **Performance & Accountability (P&A)**, which is an internal	Monitoring performance of day-to-day Secretariat operations and assessing whether Global Fund's core operating functions are facilitating investments to maximize impact through: • **Secretariat oversight and decision-making** by Secretariat teams, MEC, and SteerCos related to implementation of
Program Monitoring	Routine and periodic data collection and in-country evidence generation reported to the Global Fund, which leverage (where possible) existing routine national monitoring systems and reported to the Global Fund through:	Monitoring investment performance, including grants and Catalytic Investments, and progress of Principal Recipients (PR) operations through:

Source: Global Fund. Global Fund Monitoring & Evaluation Framework; 2022. Accessed March 1, 2024. https://www.theglobalfund.org/en/monitoring-evaluation/