Practical guide

Learning lessons from experience

Technical Resources Division
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The methodologies presented in this guide have been tested and refined through various Handicap International lesson learning initiatives (Burundi, Cambodia, Djibouti, India, Kenya, Philippines, Rwanda, Somaliland and Tanzania). We thank these field teams and their partners for their contributions.

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Practical guide

Learning lessons from experience

"Lesson learning is turning experience into a body of knowledge that can be shared".[1]

Readership
This methodological guide is for all Handicap International staff (individuals and teams) who intend to capture lessons learned from a project or programme experience.

Purpose
The objectives of the guide are as follows:
- to explain what lesson learning is;
- to define the lesson learning process within Handicap International;
- to provide practical methodologies and tools for lesson learning.

Using the guide
The guide is organised into three main sections:
- **Principles and Benchmarks:** this section provides important definitions and a framework for understanding how lesson learning occurs within Handicap International programmes.
- **Planning:** this section offers practical advice for planning a lesson learning process. It explains how to formulate clear Terms of Reference; how to select a methodology; and how to prepare a detailed Action Plan.
- **Implementation tools:** this section offers practical tools to help implement an effective lesson learning process, including: how to capture, formalise and publish lessons learned; how to disseminate your publication; and how to influence change.

Note from the authors
Learning lessons from project experiences is an essential activity for promoting innovation, good practice and collaboration across the Handicap International Federation. The tools presented in this guide have been developed and tested over time, by working directly with various Handicap International programmes throughout the world. They will continue to be tested, revised and improved based on feedback from project teams.
We hope you will find this guide useful and we welcome any comments or suggestions for improvement. Please email: capitalisation@handicap-international.org

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Lesson learning:
Key messages from this guide

What is lesson learning?
Lesson learning is a systematic process to identify specific knowledge that has been developed through a particular project or programme experience in order to analyse, explain and model it, either for adaptation or replication by others, or to avoid repeating the same mistakes.

Key messages:

1. Lesson learning initiatives should be user-oriented: i.e. your final objective is not simply to produce a publication, but to actively use the knowledge and know-how that you have captured to influence the behaviour, relationships or activities of others.
2. This guide is mainly focused on internal lesson learning, i.e. with a primary objective to improve Handicap International's own professional practice and organisational performance. However, external actors can make an important contribution to this process and can also benefit greatly from the lessons learned.
3. There are several lesson learning methodologies presented in this guide–but they are not fixed models. The methodologies will always need to be adapted to the context.
4. It is not appropriate for all Handicap International projects to implement a detailed lesson learning process, unless senior technical and operational staff agree that there is clear added value for the wider organisation.
5. However, all Handicap International projects should aim to capture the main lessons learned. The best way to do this rapidly and effectively is by completing a Learning Paper at the end of the project.
6. Do not start a lesson learning process before carrying out a basic literature review, using Skillweb to check for previous publications on the topic concerned. We want to complement rather than duplicate existing resources. Equally, don't complete your lesson learning process without sharing your publication on Skillweb.
7. Good planning is the most important step for lesson learning. It is essential to complete detailed Terms of Reference as soon as possible, and then to revise these over time, working with relevant Technical Advisors, Operational Managers and the Knowledge Management Unit to develop a comprehensive and realistic plan of action.
8. The target audience for your lesson learning should not be vague (e.g. "All of Handicap International and all partners and stakeholders"). Rather, you need to specify and prioritise: who specifically in Handicap International (or externally) are we mainly trying to influence?
9. You need to think beyond dissemination and more towards actively engaging with your target group. Develop some activities that will inspire them to analyse or change the way they work. So, whether it's a roundtable meeting, training, mentoring, workshops, or seminars—use the knowledge you have captured to try to inspire others!
10. The Knowledge Management Unit (the Capitalisation Manager) can provide information and support on lesson learning. Please make contact via Handicap International headquarters in Lyon.
    Email: capitalisation@handicap-international.org;
    Phone: +33-4 78 69 79 79
    Fax: +33-4 78 69 79 94

Burundi, 2009

Principles and benchmarks

What is lesson learning and what is its objective?

Lesson learning is a systematic process to identify specific knowledge that has been developed through a particular project or programme experience in order to analyse, explain and model it, either for adaptation or replication by others, or to avoid repeating the same mistakes.

Unlike **evaluation**, which usually focuses on objectively measuring the quality and performance of an entire project or programme against set criteria, **lesson learning** tends to take a more subjective, qualitative look at specific aspects within a project to analyse the more indirect ways in which change has occurred—**to try to draw out generalisations which could be applicable in other contexts.**

The process of lesson learning can be applied in various ways and adapted to different contexts and objectives.

Why should we learn lessons?

Lesson learning should be an essential activity for all organisations, but it is particularly relevant for international development and/or humanitarian organisations engaging in complex social processes in very diverse contexts.
The primary reason for an organisation to carry out lesson learning is to improve or sustain the quality and efficiency of its actions. But the lesson learning process can have multiple objectives at multiple levels, impacting individuals, teams and the wider organisation in different ways.

For example, a lessons learned process can enable:

- **individuals** to objectively analyse and improve their own professional practice; to identify existing or required skills; to transfer their individual knowledge and experience to others.
- **project teams** to identify and promote their common knowledge; to improve team practice; to develop group cohesion and a collective identity; to promote project successes and share knowledge with a wider audience.
- **country programmes and the wider organisation** to replicate good practice in various contexts; to avoid knowledge loss; to avoid duplication; to learn from failures and mistakes; to institutionalise good practice; to influence the behaviour, relationships or activities of external actors and organisations; to promote the knowledge acquired by the organisation in different arenas; to create tools for advocacy; to justify the organisation's actions and strategic choices.

As we will explain in this guide, **every** Handicap International project should attempt to capture and share its main lessons learned, both positive and negative. We refer to this as a "Learning Paper", which is something that can be produced quite rapidly at the end of a project and can be of great value for shaping future programming.

Aside from Learning Papers, there are several other lesson learning methodologies explained in this guide. However, it is **not** appropriate for any Handicap International project to implement a detailed lesson learning review, **unless** senior technical and operational staff agree that there is clear added value for the wider organisation.

In all cases the aim of lesson learning is to go beyond analysing *WHAT* we did and to focus rather on *HOW* we did it. Moreover, the final objective of lesson learning is **not** to complete a publication. It is to **actively use** the knowledge and know-how collected to improve our **own practices and strategies** and to **inspire**

others, through dissemination, training, advocacy or awareness-raising activities.

How does lesson learning relate to Knowledge Management more broadly?

Lesson learning from project experiences is a primary feature of Handicap International's Knowledge Management strategy. Such lesson learning should never be an isolated experience, but incorporated into a wider knowledge management cycle.
Handicap International's Knowledge Management team (based at its headquarters in Lyon) is in place to ensure that lessons learned from field experience, where relevant:

- Are accessible for download from the **Lessons Learned Platform** on Skillweb;
- Can be incorporated into HI's **professional publication collection** as 'Satellite documents';
- Can be added to the **Source** website for an external audience;
- Can be shared through existing HI **exchange and appropriation mechanisms** ('REACT' meetings, talk & breakfast meetings, video webinars, seminars, etc.);
- Can be further developed into **technical training** modules;
- Can be elaborated as **research** initiatives.

Short lesson learning glossary

Lesson learning: a systematic process to identify specific knowledge or know-how that has been developed through a particular project or programme experience in order to analyse, explain and model it for sharing and replication by others.

Capitalisation: capitalisation is essentially a French term meaning the same as "learning lessons from experience". Given that Handicap International originated in France, this term is still widely used across the organisation. However, for the purposes of this guide and for an English-speaking audience, we use the term "lesson learning" instead of capitalisation.

Good practice: a specific approach, initiative or action, which according to set criteria, clearly demonstrates effective achievement of a specific goal. 'Good' does not men 'perfect': practices can always be improved.

Innovation: an approach, technique, initiative or action which is new for a given context, which demonstrates early positive results, and which can be scaled up or tested further. It is not necessarily an invention or something entirely new for the wider organisation. It can consist of trying a different technique or approach to improve an existing process.

Failures: major challenges, barriers or problems experienced at field level, including those which were overcome and those which are ongoing.

Know-how: skill or competence acquired through experience, which is useful for the implementation of a process, for solving a practical problem, for creating a product or providing a service.

The lesson learning focus for this guide

Main users

This guide is primarily intended for use by Handicap International **project managers/ project teams** wishing to undertake a lesson learning process.
Project managers/teams can use this guide to develop lesson learning activities, but in all cases they should consult with relevant Technical Advisors, Technical Coordinators, Operational Managers and the Knowledge Management Unit, to support and validate their efforts.

Scope of lesson learning

The main focus of the guide is on capturing lesson learned from a **single project** (usually a specific aspect *within* a project) and using this to influence the wider organisation.
However, the methodologies and practical tools in the guide can also be adapted by Technical Advisors and Technical Coordinators to conduct multi-project, thematic lesson learning.

Internal or external?

Each lesson learning project must clearly specify a primary target audience.
This guide is mainly focused on internal lesson learning, i.e. with a primary objective to improve Handicap International's own professional practice and organisational performance[2].
However, it is important to note that:
(a) external stakeholders, partners and beneficiaries can play an important role in identifying key knowledge and know-how from a Handicap International project or programme experience (they may be aware of specific achievements or barriers that the project team are not); and (b) external stakeholders, partners and beneficiaries can also benefit from the knowledge and know-how derived from an internal lesson learning process.

Roles and responsibilities

It is important to identify role and responsibilities for each stage of a lesson learning process. While this will vary from one context to another, please observe the following general standards:

Project managers usually have the responsibility of managing a lesson learning process. (A consultant is sometimes recruited as support.) The Project Manager therefore plays a very important role in:
a. identifying specific aspects of projects which are important to analyse, document and share more widely;
b. developing Terms of Reference and Action Plans;
c. ensuring that lesson learning efforts are developed with the support of Technical Advisors, Operational Managers and the Knowledge Management Unit;
d. overseeing the lesson learning process and ensuring that the knowledge and know-how collected is used effectively within the project, the programme and more widely across the organisation.
Project Managers are the main intended users of this guide.

The operational managers (Country Programme Directors, Heads of Mission or Regional Desks) have a role to ensure that project managers/teams are following Handicap International procedures for lesson learning. In particular, this means:
a. promoting the use of **Learning Papers** as a rapid end-of-project exercise for all projects and a method for improving programme planning in general;
b. only promoting detailed lesson learning reviews when there is clear added value for the wider organisation;
c. facilitating effective communication between the person managing the lesson learning process and the Technical Advisors/Knowledge Management Unit;

d. supporting Terms of Reference and Action Planning to ensure a quality and consistent approach, with sufficient resources in place;
e. reviewing or refining plans for lesson learning which were budgeted/planned at the beginning of the project (and thus an obligation to the donor)—but which are less pertinent following project implementation.

The Technical Advisors (Technical Advisors at headquarters and delocalised and also Technical Coordinators) have a role to oversee the technical content of lessons learned. Essentially this means:
a. making sure that the overall aims and final messages of lesson learning publications are in line with Handicap International policies;
b. helping to select the specific aspects of projects which were particularly successful or innovative and worth analysing in detail;
c. helping to identify relevant consultants or other staff to support lesson learning processes;
d. reviewing final lesson learning publication and offering technical advice on the content;
e. actively promoting lesson learning publications throughout the organisation, ensuring they reach relevant staff around the world;
f. ensuring that lesson learning initiatives will build upon, rather than duplicate, existing Handicap International publications.

The Technical Advisors also have an important role to play in making a macro-level analysis of **all** lesson learning activities on their thematic, to draw out the good practices, innovations, challenges or failures that need to be addressed more comprehensively.

The Knowledge Management Unit provides a methodological hub for all lesson learning by Handicap International's programmes, to encourage standardised, quality approaches across the organisation.

More specifically, the KM Unit's Capitalisation Manager has the role to:
a. provide "basic package"[3] support to all field teams on lesson learning;
b. signpost HI staff to appropriate lesson learning tools and resources;
c. provide in-depth support to specific lesson learning projects identified as particularly important by the TA (this can be field-based or distance support);
d. support Technical Advisors (TAs) to make a global analysis of lesson learning needs and future strategies;
e. ensure lesson learning projects, where relevant, can be: incorporated into to HI's **professional publication collection** as 'Satellite documents'; added to the **Source** website for an external audience; shared through existing HI **exchange and appropriation mechanisms** (REACT meetings, talk & breakfast meetings, video webinars, seminars etc); developed into **technical training** modules; elaborated as **research** initiatives;
f. manage the Lessons Learned Platform on Skillweb.

Philippines, 2011

Practical guide

This section of the guide offers step-by-step, practical advice for planning a lesson learning process. More specifically it will enable you to:

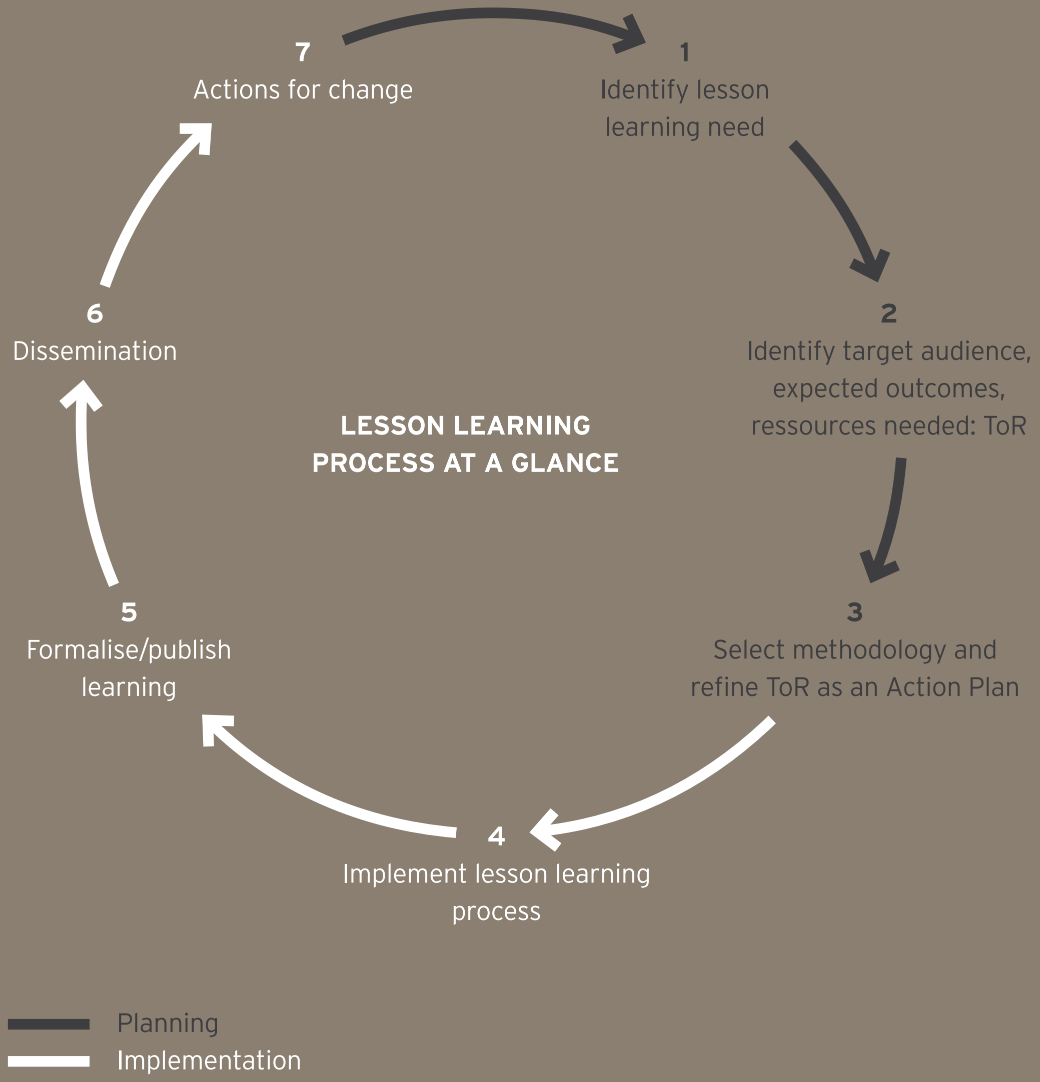
- **identify a specific subject for lesson learning**
- **clarify your objectives, primary target audience, expected outcomes, resources and operational constraints (Terms of Reference)**
- **choose a methodology that fits your objectives**
- **revise your ToR into a final Action Plan**

It is important to remember:

- there is no fixed or standard methodology for lesson learning
- in all cases, the methodologies presented in this guide will need to be adapted to the context
- the Knowledge Management Unit is available to provide information and advice

Lesson learning process at a glance

All lesson learning initiatives, regardless of the objectives or methodology used, should be comprised of 7 key elements, as explained in the diagram below. The rest of this practical guide is structured around these 7 key elements:



Identify the need for lesson learning

A

Do you actually need to carry out a lesson learning process?

It is important to capture and share lessons learned from **all** Handicap International projects. The best way to do this efficiently and effectively is by completing a Learning Paper at the end of the project. The Learning Paper is a **rapid, internal** lesson learning exercise to help Handicap International to learn from experience and improve future project planning. In general, **Learning Papers are not intended for an external audience**.

For most Handicap International projects, a Learning Paper is quite sufficient. It is not recommended to develop a more detailed lesson learning process unless there is **clear added value** for the wider organisation, for example, if a project (or a specific aspect of a project) has achieved significant impact, or has successfully piloted an innovative approach or technique. In such cases, we expect the Project Manager, Operational Manager, Technical Advisor and Knowledge Management Unit to work together to plan and implement an effective lesson learning process.

Learning Papers should be completed for ALL Handicap International projects.
↪ **See Tool 6**
If more detailed lesson learning is required, please follow the planning process outlined in the flowcharts on pages 20–22.

B

Summary of common lesson learning needs

There are many different project or programme contexts where a lesson learning process is required. It is not possible or relevant to list them all here. However, the following table provides a summary of the most common lesson learning needs presented by Handicap International projects. This table can help you to start to identify your lesson learning objective and the methodology that is best suited for this. Please note: the methodologies of Knowledge-based exit interview and Making it Work (as detailed in the table below) are not covered in this guide.

Common examples of lesson learning needs/objectives

Lesson learning needs/objectives	Possible methodologies
At the end of a project it is important for the project team to make a rapid review of the main lessons learned from the whole project, mainly to influence future planning by HI on this topic. This can and should apply to **ALL** projects, not only very successful/innovative projects.	Learning Paper
If a Learning Paper or Project Evaluation identifies some specific good practices, innovations or failures that the **project team** think would be useful or important for sharing internally within HI (in a brief, user-friendly format)	Good Practice Case Study Innovation Case Study Failure Case Study[4]
If the Technical Advisor or Coordinator wants to capture a specific practice or project experience that nicely demonstrates HI policy or positioning on a particular topic—for example to enhance a **presentation or communication** (note: this can be done rapidly or in great detail)	
If a Technical Advisor or Coordinator wishes to generate a collection of real-life, practical examples of how HI policy can be implemented in practice—for example to enhance a **training module or practical guide**	
If a Technical Advisor wishes to bring together programme staff and partners (often from different countries, for example at a **thematic seminar**) to build understanding and professional practice on one or several key issues	
If the project manager or coordinator of a very successful HI initiative is leaving and the Country Programme Director, Head of Mission, Technical Advisor or Technical Coordinator want to capture his/her extensive knowledge and know-how so that the new staff/team can **sustain the project** fully	Detailed lessons learned review with Practical Recommendations for replication/ scaling up[5]
If a **project approach** has been applied very successfully over several years and achieved positive outcomes and the Technical Advisor, Technical Coordinator and Project Team agree that it is a model that could or should be **adapted or replicated by HI** in the same country or in other contexts	
If one particular aspect of a project has proved extremely successful and the Technical Advisor or Technical Coordinator agree that it needs to be analysed in depth and documented for **adaptation or replication** in the same country or in other contexts	
If a successful project is coming to an end and it has been officially decided that it will **be transferred to local stakeholders** to continue in the future	
If a Technical Advisor or Technical Coordinator agree that a pilot projec/ totally new approach (something which is very different from HI standard programming) demonstrates initial good results and needs to be **further analysed**/documented for **possible replication/scaling-up**	
If a person is leaving HI or moving to a different post and it is important for HI not to lose the important individual knowledge and expertise he/she has developed on a specific subject	Knowledge-based exit interview
If a project wants to document good practices by external actors and then use this as evidence to develop advocacy activities—i.e. training, mentoring, technical support, lobbying to try to influence the behaviour, activities or relationships of EXTERNAL actors	Making it Work: www.makingit work-crpd.org

C

Process for identifying and revising lesson learning priorities

Lesson learning needs and objectives can be identified at different stages of the project cycle:

Planning lesson learning at project design phase
Many lesson learning processes are planned at project design stage, often as an expected result for the end of the project. This is particularly relevant for a pilot project or a when applying a new or innovative approach. In this case, lesson learning becomes an output of the project and thus a contractual obligation to the donor.
This pre-planning of lesson learning is strongly recommended: it is helpful to ear-mark resources for lesson learning and to place an emphasis on this from the beginning.

> However, it is important to keep the subject, methodology and outputs of lesson learning quite non-specific and open at project design phase, so that they can be revised of re-defined at a later stage, based on the actual project experience, rather than pre-conceived ideas.

Lesson learning objective emerging during or after a project
For some projects, a lesson learning objective might be identified as part of a mid-term or end-of -project review, once a fuller picture of the project impacts and outcomes starts to emerge. It may be that the project, or some specific aspects of it, have proved to be particularly effective, successful, or difficult, and thus worth analysing in detail.

If a lesson learning process is planned at the end of a project it is important to ensure that (a) it is sufficiently resourced, both financially and technically and (b) that key people with important knowledge and know-how derived from the project are still available to contribute to the process.

> In all cases, Terms of References (ToR) should be completed as soon as possible, and then revised and updated as the project progresses. See flowcharts on pages 20–22.

Checklist before moving on to Terms of Reference:
- Is there a clearly identified need for Handicap International to learn lessons from this project experience?
- What is the added value for the wider organisation?
- Have you consulted with the Operational Coordinator/Technical Advisor?
- Have you checked Skillweb to ensure that you are not duplicating an existing publication or lesson learning initiative?

Identify the need for lesson learning

Flowcharts: lesson learning at different stages of the project cycle

The following flowcharts offer a basic tool for Project Managers to think through the required steps for planning a lesson learning process, whether their project is at start-up, mid-term or completion stage:

Considerations for planning lesson learning at the start of a project

PROJECT DESIGN/START

Has a lesson learning need been identified for this project? (For example if the project is particulary innovative or if certain approaches or types of expertise need to be documented, analysed and shared.)

No → **Not at this stage, but will review again at mid-term and end of project**

Yes → **Project manager completes basic ToR.**

ToR to be checked and validated by Operational Manager and Technical Coordinator.

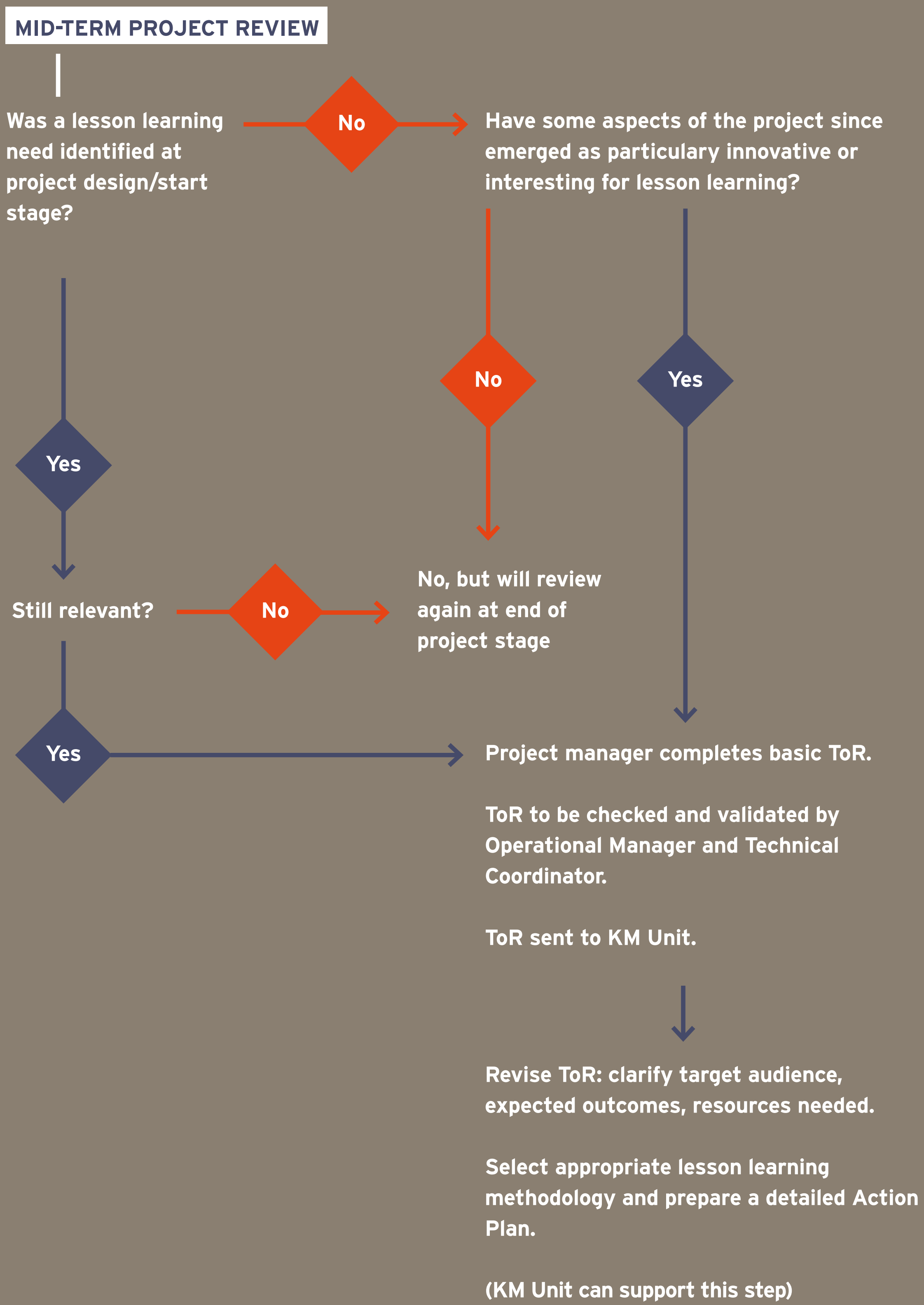
ToR sent to KM Unit.

→ **Revise ToR: clarify target audience, expected outcomes, resources needed.**

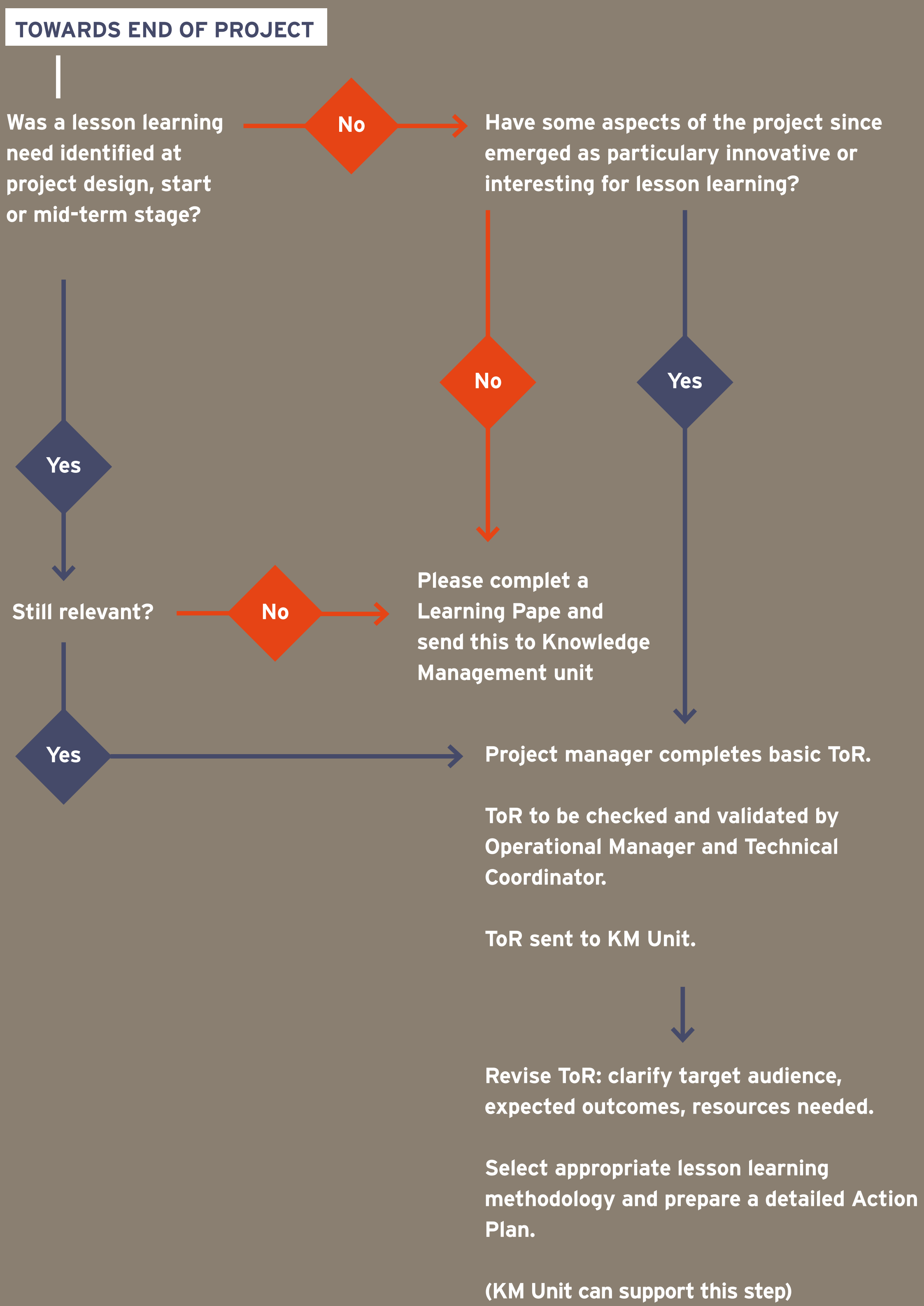
Select appropriate lesson learning methodology and prepare a detailed Action Plan.

(KM Unit can support this step)

Considerations for planning lesson learning at the mid-term review



Considerations for planning lesson learning at the end of a project



Identify objectives, target audience, expected outcomes, resources needed

A

Select a specific subject

In most cases, it is necessary to **narrow the focus** for lesson learning and **choose a specific aspect of a project that is feasible to analyse in detail—and not the whole project**.

Selecting the subject for lesson learning requires discussion with the project team, partners, Operational Managers and Technical Advisors. Carrying out a rapid Learning Paper is a good way to identify the most important experiences from the project.
↳ **See Tool 6**

The Technical Advisor can verify if the subject/key messages of the lesson learning are in line with Handicap International policy/ positioning and potentially interesting for other programmes.

Here are some generic criteria to help select a specific subject for lesson learning:
- A specific aspect of a project which has achieved demonstrable impact;
- A specific aspect of a project which could be replicated in other contexts;
- A specific aspect of a project which was highly efficient in terms of time, finances, human resources;
- A specific aspect of a project which has proved sustainable;
- A new technique or approach that was tested during the project that proved very effective;
- An aspect of the project which was extremely difficult or challenging, and thus important to analyse.

Checklist for selecting your subject
- Have you checked Skillweb or asked the Technical Advisor to see if there are any existing Handicap International publications/lesson learning documents available on this subject?
- Is there clear added value to carry out another lesson learning process on this subject?
- For the topic concerned, which Handicap International staff and/or external partners have the knowledge and know-how that you want to capture? Are they available for interviews/meetings?
- Do you need specific expertise or support to coordinate lesson learning on this subject?
- If you select a very specific subject, which members of the project team does this most concern? How can you involve the others?

B

Draft terms of reference

Defining clear, realistic Terms of Reference (ToR) is the most important part of any lesson learning process. This helps you to think very concretely about the knowledge or know-how that you want to capture and what you actually want to do with it afterwards.

The draft ToR should be sent to the relevant Operational Manager and Technical reams for feedback and validation.
↳ **See Tool 1**

Once you have some ToR it is possible to select a lesson learning methodology from this guide and revise the ToR into a more detailed Action Plan.
↳ **See Tool 2**

The ToR form is quite self explanatory.
↳ **See Tool 1**

The main guiding principles for developing ToR are as follows:

- Project Managers usually draft the ToR, but this should be done in consultation with Operational Manager, Technical Coordinators and Technical Advisors, as well as the Knowledge Management Unit if needed.
- It is important to draft **initial** ToR for lesson learning as early as possible, but they should be revised and improved over time.
- Poorly developed ToR will impact very negatively on the quality of the lesson learning process and final publication.
- The ToR form requires you to carefully consider your target audience. This is crucial. You have to identify who your lesson learning is for and what you expect them to do with the knowledge/know-how that you have documented.
- The ToR form requires you plan to specific actions to influence change. The purpose of lesson learning is not to complete a publication, but to use the contents of your publication to inform, train or influence others.
- The ToR form requires you to fully consider operational issues, regarding: Who will lead the lesson learning process; Who has the knowledge/know-how to be captured; Deadlines/time limitations; The resources available (financial, technical, time).
- The Technical Advisor can verify if the lesson learning is in line with HI policy/ positioning and give a "green light" for the project to go ahead. If the subject is highly relevant and important to the department, the Technical Advisor may choose to follow the lesson learning process in detail.

  In most other cases, the Technical Advisor will not be able to closely supervise the process but will follow progress from distance.

Key point: The initial ToR should clarify your overall objectives and resources available. It is not a problem if you are initially unclear about which lesson learning methodology to use. This will be covered in the next section of this guide, at which point you can outline your specific activities, revise your ToR and formulate a detailed Action Plan.

Selecting a methodology and revising the terms of reference

The initial ToR have helped you to identify **what** you want the lesson learning process to achieve. The next step is to outline more specifically **how** you are going to achieve it. This requires selecting a methodology and then listing the main activities that need to be carried out.

In this section we provide an **overview** of various lesson learning methodologies that can be adapted to different contexts.
Please try to identify the methodology that most suits your objectives and then **revise your ToR accordingly.**

A

Which lesson learning methodology?

Whichever lesson learning methodology is selected, it will always need to be adapted to the context.
Here we briefly explain the following methodologies:
- Learning Paper
- Case studies (good practice; innovation; failure)
- Detailed Lessons Learned Review

Summary: Learning Paper

Purpose: All Handicap International projects should incorporate some basic lesson learning in order to identify: what worked well; what didn't work so well; what we could do differently next time… Learning papers offer a rapid, 'light' version of lesson learning specifically for this purpose. The information is collected by project teams and then used by Technical Advisors, Desks, Programme Directors and Heads of Mission to improve or revise future project planning.

Learning papers can be completed at:
- the end of the project or
- the mid-term project review and then revised and finalised at the end of the project.

Main activities:
- Learning papers should be completed by a small group of people who really know the project in detail, i.e. the project team, but also external partners if appropriate.
- Learning papers are intended as a **rapid** lesson learning exercise.
- If the project covers several countries or zones, you may need to organise several workshops and then combine/merge feedback after.
- The learning paper has 15 standard questions, but it is possible to add others. A facilitator works with a group to consider each question in turn.
- The final document is completed during the workshop and emailed directly to the Knowledge Management Unit for sharing on Skillweb.

Approximate timescale: A workshop should last between 2–6 hours maximum.

Final format: Word document using standard template, approx. 5–10 pages total.
↳ **See Tool 6**

Roles, Responsibilities, Staff profiles:
The process needs a facilitator (usually the project manager, but possibly with support from technical coordinator) to organise the group and write the final document. The facilitator will need the following capacities: strong communication skills; workshop facilitation skills; ability to encourage participation of all group members; ability to review the project objectively; ability to synthesise information and write clearly and concisely.

If a Learning Paper meets your lesson learning objectives, please revise your ToR accordingly and then refer to **Tool 6** for support with implementation.

Summary: Good practice case study

Good practices, innovations and failures can be collected as a single case study, but the real added value is often to compile and analyse several case studies.
Indeed it is quite effective to produce one document which compares and contrasts examples of good practices, innovations and failures, with additional analysis and recommendations.

Purpose:
A good practice case study provides a real-life example of a specific action, approach, technique or initiative which occurred as part of a Handicap International project and has clearly achieved positive impact. This is **not** a communications or promotional tool as such. Good practice case studies should be quite technical, focusing not only on WHAT occurred but HOW it was achieved. This requires some detailed analysis to look at the most **significant changes, facilitating factors, barriers or challenges, with practical recommendations for replication or scaling up in other contexts.**

Good practice case studies are used to **influence the actions of others**, primarily Handicap International staff. Common reasons for documenting good practice case studies would include:

- If a Learning Paper identifies some specific good practices that the **project team think would be useful** or important for sharing internally within HI (in a brief, user-friendly format).
- If a Programme Director or Head of Mission wishes to highlight a specific practice for exchange with certain partners.
- If the Technical Advisor or Coordinator wants to enhance a **presentation or document** by adding a specific practice or project experience that nicely demonstrates HI policy or positioning on a particular topic.
- If a Technical Advisor or Coordinator wishes to enhance a **training module or practical guide** by presenting a collection of real-life, practical examples of how HI policy can be implemented in practice.
- If a Technical Advisor wishes to bring together programme staff and/or partners (often from different countries, for example at a **thematic seminar**) to build understanding and professional practice on one or several key issues.

Of course, deciding what is "good" is a value judgement which requires support from a Technical Advisor or another expert to establish some criteria. Furthermore, "good" does not mean "perfect": there are always ways to develop or improve a practice. A good practice is simply a specific action that was effective in achieving a positive impact and which could be adapted or replicated in other contexts.

Main activities:

- Identify your specific topic area
- Identify the target audience: i.e. what will the good practice case study/studies be used for?
- Work with a technical expert to establish criteria for 'what is good practice'.
- Map specific examples from the project to be investigated
- Capture the good practice: semi-structured interviews or focus groups with key actors associated with the practice (e.g. service providers, beneficiaries, project staff)
- Document the good practice using a standard template
  ↳ **See Tool 7**
- Perhaps collect several case studies and compile into one document with a summary, conclusion and overall recommendations

- Use the good practice case studies to influence the practice of others, particularly Handicap International staff, whether through a presentation, training workshop, seminar or other activity.

Approximate timescale: It is possible to document just one case study or to compile several. It is also possible to incorporate good practice case studies into a more detailed.

Lesson Learned Review. Case studies can be collected quite rapidly or developed in great detail. Minimum timescale for producing 5–10 case studies: 2 months.

Final format: Each case study is a short Word document using a standard template, approx 5–10 pages.

Roles, Responsibilities, Staff profiles:
You will need someone who has both the time available and the skills set to make field visits. Relevant skills include: strong understanding of the subject; capacity to carry out semi-structured interviews or focus groups with people at various levels; high quality writing skills to synthesise the information captured and present it clearly and concisely.

A good practice case study for internal lesson learning is not to be confused with the **Making it Work** methodology, which offers a more comprehensive, project-based approach for collaboratively documenting examples of good practice on a specific topic and using this as a basis for **advocacy aimed at external actors:** www.makingitwork-crpd.org

Summary: Innovation case study

It is extremely important for Handicap International to document and analyse new ways of working at field level, in order for the organisation to continue to adapt and respond to changing circumstances.
See Tool 8

Common reasons for documenting an innovation case study would include:
- If a Learning Paper or Detailed Lessons Learned Review has identified a particularly successful innovative approach or technique
- If a Technical Advisor wants to document new ways of working on a particular issue
- If a pilot project demonstrates early signs of positive impact.

An innovation is an approach, technique, initiative or action which is new for a given context, which demonstrates early positive results, and which can be scaled up or tested further. It is not necessarily an invention or something entirely new for the wider organisation. It can consist of trying a different technique or approach to improve an existing process.

An innovation could be a pilot project or a pilot activity within a project.

An innovation case study offers a rapid, user-friendly format to document innovations from field experience. These can be discussed and analysed with relevant project staff, partners and technical advisors, to identify the ways in which the action could be further tested or applied in different contexts. Deciding what is "innovative" is a value judgement which may require support from a Technical Advisor.

Again, innovation case studies are **not** communications or promotional tools as such. Rather, they should be quite technical, focusing not only on what occurred but how it was achieved. This requires some detailed analysis to look at the **most significant changes, facilitating factors,**

barriers or challenges, with practical recommendations for replication or scaling up in other contexts.
The methodology, timescale, and staff required for documenting an innovation case study are broadly the same as for good practices (see above).

Summary: Failure case study

It is often quite difficult to talk about 'failures' in development and humanitarian work. But documenting and analysing examples of what did not work well is an extremely important for lesson learning and can contribute significantly to future strategic planning, to avoid repeating the same mistakes[6].
↳ **See Tool 9**

A failure case study offers a rapid, user-friendly format to document major challenges, barriers and problems experienced at field level (including those which were overcome and those which proved impossible to resolve). This must be a **constructive, solution-focused process**, whereby technical and project staff analyse together how major difficulties occurred and how they could be best avoided in future.

Common reasons for documenting a failure case study include:

- If a Programme Director, Head of Mission, Technical Coordinator or Technical Advisor identify the same type of failure or challenge occurring repeatedly in projects, and want to analyse in more detail the causes and potential solutions
- If a Technical Advisor wants to compare and contrast good practices, innovations and failures on a specific theme
- If a Learning Paper or Detailed Lessons Learned Review has identified a specific failure or difficulty which is important to analyse in depth.

Documenting a failure case study requires similar time and resources to that of a good practice or innovation study. The activities are also similar, but the content is often quite delicate and particular attention should be given to capturing information in an appropriate manner, i.e. to monitor the extent to which staff and partners are able to discuss major problems/challenges together as a group.

↳ If capturing one or several case studies from a project meets your lesson learning objective, please revise your ToR accordingly and then refer to **Tools 3, 5, 7, 8, 9, 10** for support with implementation.

Summary: Detailed lessons learned review

Purpose:
A detailed **lessons learned review** is an in-depth, multi-stakeholder analysis of how change occurred within a project and how the experience could be modelled for adaptation or replication in other contexts. This methodology is mostly applied to a **specific aspect** of a project. The process often ends with creating a set of Practical Recommendations, for HI staff working in other countries or contexts, with clear advice and information for replicating the model. A detailed lesson learned review can incorporate the other methodologies featured in this guide: Learning Paper; Good Practice/Innovation/Failure case studies.

The following examples give some indication about when a detailed lessons learned review might be appropriate:

- If the project manager or coordinator of a very successful HI project is leaving and the Country Programme Director, Head of Mission, Technical Advisor or Technical Coordinator want to capture his/her extensive knowledge and know-how so that the new staff/team can sustain the project.
- If a project has been applied very successfully over several years and achieved very positive outcomes, and the Operational and Technical team agree that it is an important model for HI to adapt or replicate for other contexts.
- If one specific aspect of a project has proved extremely successful and the

Technical Advisor or Technical Coordinator agree that it needs to be analysed and documented for replication in the same country or other contexts.
- If a highly successful project is coming to an end and it has been officially decided that it will be transferred to local stakeholders to continue in the future.
- If the Technical Advisor or Technical Coordinator agrees that a pilot project or new approach (i.e. something different from standard HI programming) demonstrates initial good results and needs to be further analysed and documented for possible scale-up.

Main activities:
A detailed lesson learning review requires carefully facilitated workshops and interviews with project staff and partners. The challenge is to think beyond the official project activities and logical framework, towards the more complex factors which led to positive change. The methodology is organised into **the following steps**:
- Produce a learning paper to orientate project staff (and possibly external partners) around the lesson learning process
- Workshop and/or interviews to identify the key moments for the specific topic identified, i.e. the major changes in behaviour/activities of project target groups; resolution of major obstacles or challenges during the project; times when new approaches or tactics were applied.
- Workshop and/or interviews to identify success factors, i.e. the specific actions which led to the key moments—or how you were able to move the project forward
- Workshop and/or interviews to draw out conclusions and generalisations from this lesson learning
- Workshop to create some practical recommendations which might help HI staff in other contexts (and possible external organisations also) to effectively adapt or replicate this model.
- Production of publication (whether a written publication, film or other format)
- Effective dissemination of the publication to the target group
- Specific, well-planned activities to transfer the knowledge and know-how, i.e. through presentations, seminars, workshops, etc.

Approximate timescale: Minimum 3 months

Final format: Most commonly a written publication using a standard Learning Lessons from Experience template (Approx 50 pages) but can also use film or other media.
↳ **See Tool 12**

Roles, Responsibilities, Staff profiles:
The project manager and the team are central to the lesson learning process and must oversee its coordination and participate fully in the process. It is possible to recruit an external consultant or support person to help facilitate interviews, meetings, data collection, or writing of documents—but not to manage the whole process independently. Ideally an external support person/ consultant should have knowledge and experience of: the subject; carrying out field-based semi-structured interviews or focus groups; liaising with technical staff, project staff and partners at all levels; conducting evaluations or lesson learning activities; facilitating workshops; coordinating and writing quality publications; delivering training, advocacy or awareness-raising activities.

↳ If a detailed lessons learned review meets your lesson learning objective, please revise your ToR accordingly and then refer to **Tools 3, 4, 5, 11** for support with implementation.

B

Revise your terms of reference and develop a detailed action plan

Having selected a methodology, you now need to revise your ToR into a final Action Plan.

This means working with Operational Managers and Technical Advisors (and, if needed, the Knowledge Management Unit) to finalise the project activities, expected results, project resources and timescale. There is no standard template for the Action Plan as a detailed ToR may often suffice. However, for an example please **see Tool 2**. Please also **see Tools 12, 13, and 14** to help with deciding the format of your publication, dissemination strategies and actions for change.

Checklist for planning any lesson learning process:

- Are you sure this lesson learning process is actually necessary?
- Is the knowledge/know-how important and relevant for the wider organisation?
- Is it feasible? Do you have adequate time, as well as technical, financial and human resources?
- Rather than the whole project, do you have a specific subject focus for lesson learning?
- Are your key messages in line with HI policy/positioning?
- Have you completed and validated some Terms of Reference, with objectives, target group, expected outcomes, publication format, resources and timescale clearly identified?
- Have you selected an appropriate lesson learning methodology?
- Have you formulated a clear, realistic action plan?

Cambodia, 2011

Implementation tools

PREPARATORY TOOLS

METHODOLOGY-SPECIFIC TOOLS

USING YOUR LESSONS LEARNED

1. Terms of Reference form

- Defining clear, realistic ToR is the most important part of any lesson learning process.
- This helps you to think very concretely about the knowledge or know-how that you want to capture and what you actually want to do with it afterwards.
- ToR should be written by the person initiating the lesson learning process, but the document should be (a) elaborated by others involved in capturing the knowledge/know-how, and (b) validated by those with technical or managerial responsibility for the overall outcomes.
- ToR should be completed as early as possible—but they must be revised and improved over time, according to changing priorities and circumstances.
- Once completed, you can contact the Knowledge Management Unit (capitalisation@handicap-international.org) to help refine the ToR into a more detailed Action Plan.

Name:

Job title:

Email address:

Project/Programme/Department:

PART A. Overall Objectives

1. Identify the specific subject for lesson learning

Tips: In general, it is not appropriate to capture lesson learned from an entire project. Rather, you should choose a specific aspect of the project that is feasible to analyse in detail. This could be:

- A specific aspect of the project which has proved highly successful
- A new technique or approach that was tested during the project that proved very effective
- An aspect of the project which was extremely difficult or challenging, and thus important to analyse.

Equally, you may choose to focus on a specific period of time, rather than the entire project duration.

Ask the Technical Coordinator (TC) and/or Technical Advisor (TA) if they think this subject is relevant or important.

2. Why are you doing this lesson learning: what is the need that it addresses?

Tips: Why is this specific subject important? Is it important only for the programme or for the wider organisation? Has HI conducted lesson learning on this subject before? Do we need to do so again? Was your project experience particularly important or innovative? Do the TA/TC agree that it's important to go ahead?

3. Identify your primary target audience and define expected outcomes for them

Tips: For a lesson learning process to be effective you need to identify a specific audience. It is not sufficient to list "all HI staff and external partners". Rather, you need to say who specifically in the organisation (or externally) needs this knowledge or know-how the most? Why do they need this? How do you expect them to use this knowledge and know-how? What do you hope or expect them to do differently as a result? The whole point of lesson learning is to influence the practices/procedures of others—in particular HI colleagues.

(N.b. You can also identify secondary or indirect target groups, for example those who should receive a report, but more for general information…)

4. What approach do you envisage for the lesson learning?

Tips: Do you have an idea of the main activities that you expect to undertake for capturing and documenting the lessons learned?
There is no problem if you are not sure which methodology you will use at this stage–you can discuss this with the Knowledge Management Unit.

5. In what format will you publish your learning?

Tips: Having identified your target group, you need to consider which form of publication/media is most appropriate to document and share your learning. Most commonly this will be a publication using the HI format "Learning Lessons from Experience". But depending on your audience you can also use; audio/visual format (photo/film); oral (play, individual story); interactive (CD, website); educational (training module); or other written formats (case studies, internal working paper, poster, synopsis). Consider your timescale, budget and technical resources needed to produce a publication.

6. What is your dissemination strategy? Any dissemination risks or limitations?

Tips: How will you ensure that your publication reaches primary and secondary target audiences? You need to think about internal and external dissemination at project/programme level–but also globally for the organisation as a whole. Options include: email, HI's Skillweb (capitalisation platform), publications sent by post, in-person delivery, launch meetings etc. Consider how many printed copies you actually need.
Regarding dissemination risks: Lesson learning does not only focus on good practice and innovations. It can also highlight major failures, obstacles or challenges. If the subject is particularly delicate or unsuitable for certain audiences (e.g. some donors, partners etc), you need to consider in advance how you will manage dissemination, and how this might affect the type of publication you produce.

7. Define your actions to influence the practices of others

Tips: Distribution of your publication is not enough. Lesson learning is an active process: the whole purpose is to turn a specific experience into wider, organisational knowledge. Your aim should be to positively influence the behaviours, relationships or activities of your target group. Go back to Q. 3: how do you hope or expect your target group to use this knowledge/know-how? Once this is clear, what type of activities would be most productive for this objective? For example: do you envisage a seminar, working group, training module, etc. ?

PART B. Operational questions…

1. Timescale/deadline

Tips: When do you need to complete this process? Is there a specific date identified? Do you have other projects to complete during the same timeframe?
Look back at your objectives–are they feasible in this timescale?

2. Resources available

Tips: What budget do you have for this lesson learning? Is it sufficient? Do you have staff who can devote their time to this or do you need to recruit a consultant or intern to help the project manager?
Please consider the cost of staff/accommodation/per diem; organisation of meetings/workshops; translation; accessibility requirements; producing a report or film; dissemination costs etc.
Look back at your objectives–are they feasible with the resources that you have?

3. Who has the knowledge/know-how?
Tips: Who do you need to speak with to capture the knowledge/know-how?
Who has detailed knowledge about this subject? Who knows the full history of the project experience (for example key successes, failures, barriers, challenges, innovations, tactics used)? Which HI staff need to be involved in capturing this knowledge or know-how? Which external stakeholders? (Try to list specific names of individuals and/or organisations)
Note: it is possible only to interview HI staff. However it can be a much richer experience if you also speak with relevant external stakeholders—because they may have seen elements of progress or barriers or have developed know-how that HI doesn't know about.

4. How to work with different individuals/ groups?
Tips: According to the knowledge/learning that you want to capture, do you need to plan for individual interviews or group workshops? If the topic is particularly sensitive or complex, it may not be appropriate to discuss with certain partners.
Questionnaires, semi-structured interviews, focus groups are different options available.

5. Who is going to manage the lesson learning process?
Tips: You need to outline key roles and responsibilities.
Who is leading this lesson learning process? Who will capture the lessons learned through interviews or focus groups? Who can write the final publication? Who can lead training, presentation or workshop activities after the publication?
What kind of CV/profile are you looking for? Do you need a consultant? Have you liaised with Human Resources and Technical Advisors at HQ?

6. Who has validated your lesson learning objectives?
Tips: Have you discussed your lesson learning ideas with relevant Operational, Technical and Knowledge Management staff? To what extent will they be involved in supervising or following the process?
Who has responsibility for the overall outcomes?

7. What technical or methodological support do you need?
Tips: You may need support from the KM Unit to develop your Action Plan.
You may need technical support from the DRT to select the topic and draw out recommendations/key messages for your final publication. You may need a consultant to help implement the process in the field or to carry out a specific exercise (for example filming).

8. Preparatory work envisaged
Tips: Before starting any lesson learning process you are advised to access Skillweb to identify whether this subject has been addressed before by HI and how this could affect your plan. You are advised to conduct a literature review on the subject and perhaps research how other organisations have conducted similar studies.

2. Example of a lesson learning action plan

It is not an obligation to complete a Lesson Learning Action Plan. However, this can help to reformulate your final Terms of Reference into a logical framework format, to clarify the sequence of activities and expected results. The example below is taken from a detailed lessons learned review for a project on disability-inclusive public health systems, Gujarat, India. It has been adapted for the purposes of this guide.

Overall Objective

To promote people with disabilities' equal access to quality & inclusive public health services.

Specific Objectives of the lesson learning process

1. HI staff in India (as well as HI staff from other South Asia programmes) have the capacity to design and implement effective projects to promote disability-inclusive public health systems, using an extensive and successful project experience from Gujarat as a model.

2. All HI staff have access to a practical, experience-based resource to help develop projects related to disability-inclusive public health systems.

Expected Results

1. Important tools and resources from the Gujarat project have been collected and organized (Project Toolbox).
Timescale: 4 weeks

2. Key HI project staff and external stakeholders have undertaken a detailed lessons learned review to analyze the various ways in which positive change occurred. **Timescale: 6 weeks**

3. Generalized recommendations from the lesson learning have been elaborated into a publication, including some practical, step-by-step recommendations for replicating the Gujarat model in India and other countries.
Timescale: 2 months

4. The experience and practical knowledge developed from the lesson learning has been transferred through various dissemination, training and appropriation activities at Regional and HQ level. **Timescale: 1 month**

Main Activities

1.1 Recruit a consultant to support process. (with support from HR, Technical Advisor and the Knowledge Management Unit to make a selection).
1.2 Provide consultant with relevant briefing: on the project and on the lesson learning methodology.
1.3 Conduct a desk review of important project documents (original project proposals, project presentations, logical frameworks, implementation plans, practical tools and resources, evaluation documents).
1.4 Select the most useful and important resources.
1.5 Organize the resources into a coherent whole, with summary information.

2.1 Identify key resource people—i.e. the specific stakeholders who know the project very well (either the whole project or some aspects of it) and can talk about the project process and/or its impact.
2.2 Inform the selected stakeholders of the lesson learning plans and make arrangements for field visits, focus groups and interviews.
2.3 Plan the lesson learning workshops and interviews with stakeholders.
2.4 Undertake a detailed lesson learning review, initially working with HI staff who have direct knowledge of the project.

2.5 Conduct focus group meetings with state level health officials and the state project coordinator; and individual or group interviews with District health officials and Integrated Child Development Scheme project officers, medical officers, health workers; District rehabilitation partners and their staff; District NGO partners and their team members; District Advocacy Group members; people with disabilities and their families benefited from the advocacy and other activities facilitated by HI and its partners. Gather testimonies.

2.6 Draw out generalizations and recommendations from all the lesson learning meetings/interviews.

3.1 On the basis of the lessons learned and recommendations, draft some practical recommendations which offer step-by-step guide about how to replicate the project model, from stakeholder/situation analysis → project design/log frame → implementation → M&E.

3.2 Work with HI Programme Manager and Technical Advisors to validate the practical recommendations.

3.3 Produce your final publication with the following contents: Introduction: Aims and objectives for this lesson learning project & intended audience; Principles and Benchmarks: define importance of inclusive Public Health Systems and the relevance for HI, Explain the situation in India and specifically Gujarat; Overview of the project; Overview of the lesson learning process and summary of main lessons learned; Presentation of Practical recommendations–how to replicate the model; Annex: Project Toolbox.

4.1 With support from the Knowledge Management Unit, produce the publication as a "Satellite document"– using the standard format "Lessons Learned from Experience".

4.2 Organize two meetings at the HI country office: one for briefing all staff; another one for a detailed 5 day training workshop for relevant HI Staff in Delhi, with participation from HI staff from other South Asia programmes.

4.3 Publication disseminated across HI via Skillweb; printed publication disseminated locally in India and via South Asia programmes.

4.4 Talk&Breakfast presentation at HI's H.Q. in Lyon by Technical Advisors about the project/lesson learning publication.

3. Ensuring meetings, interviews and publications are accessible for people with disabilities

This is a brief tool to explain how to make sure that meetings, interviews and publications are accessible for people with disabilities. **The information here is not exhaustive.** If you have further questions or support needs, please contact the relevant Technical Advisor for the subject of your project.

Before starting any lesson learning process, it is essential to fully consider accessibility issues.

All lesson learning processes involve meetings with HI staff and external stakeholders, whether individually or in groups, to try to capture their knowledge, know-how or experiences.

All lesson learning processes involve producing some form of publication, whether a film, or paper-based/ electronic document.

All lesson learning processes involve sharing and disseminating knowledge, whether through presentations, trainings, seminars.

People with disabilities, as colleagues, partners and beneficiaries of Handicap International projects, must be able to fully **contribute to, and benefit from, the lesson learning process.** This includes people with all types of impairments (physical, sensory, psycho-social or intellectual).

How to ensure that interviews and meetings are accessible to people with disabilities?

Before arranging a lesson learning interview or meeting, it is important to check if any of the participants require accommodations or adjustments in order for them to contribute fully.

It is important to set aside any preconceived ideas you may have about people with disabilities and how different impairments might affect communication. All individuals are different. There are varying degrees and types of impairments which affect people in different ways. Don't assume that all deaf people can lip-read, or that all people with a visual impairment can read Braille, or that people with disabilities in general should be treated differently. The key is to ask the people you are interviewing or meeting, as they will know best what their needs are and any accommodations required.

There are some general accessibility standards that should apply to all interviews and meetings, whether you think a person has a disability or not. In fact, many interviewees will not disclose that they have a disability or may not consider themselves to be disabled.

Good accessibility is something that benefits everybody. For example, if you choose a location with good physical access, rather than a building where the only entrance has a long flight of stairs, this will not only benefit people with mobility disabilities but also pregnant women, elderly people, parents with young children and so on.

General advice on making interviews and meetings accessible

When planning an interview or meeting:
- Ask the expert – i.e. the person with a disability. 'Do you need any accommodations or support to take part in this interview or meeting? For example, do you need to take extra breaks, or some support with communication?'
- Ensure that you are in a position to arrange communication support if required, i.e. you have contacts for quality sign language interpreters, CART providers, Braille or audio transcription services etc.
- If you offer assistance, wait until the offer is accepted. Then listen or ask for instructions on how to proceed. If you don't know how to provide this support– again, ask the person concerned.
- As much as possible, organise interviews and meetings in an accessible location, i.e. somewhere that is accessible by public transport; a building on the ground floor (or where there is a lift), with accessible toilets, sufficiently wide corridors for wheelchairs, adequate signage or guidance upon arrival and accessible tables or workstations; a meeting room which is well-lit and free of background noise and obstacles.
- Plan plenty of time for interviews and meetings, with sufficient breaks
- Make sure that if any attendees have a personal assistant, that you've counted them in seating and meal arrangements.

During the meeting or interview:
- Take care to speak simply and clearly.
- Speak directly to interviewees/participants and maintain eye contact rather than interacting directly with an interpreter or companion.
- Ensure the facilitators or presenters are well positioned in the room: i.e. located in a position in which everyone in the room can easily see them.
- If people who use wheelchairs are speaking, avoid using podiums. Have all speakers sit at a table instead.
- At the beginning of a meeting, clearly explain the agenda and timings
- Presentation charts should follow good accessible design, such as using large enough fonts and sufficient contrast.
- When working with people who are blind or people with low vision, all key material that is written or presented on-screen should be announced. This includes providing a verbal description of any images, animations, and/or video presented during the meeting.
- Are assistive listening devices available? Rooms with assistive listening devices will make a big difference for those with hearing loss.

Accessible publications

The following information briefly explains how to produce clear print documents which are universally accessible. The information has been adapted from the Royal National Institute for the Blind (RNIB) website. www.rnib.org.uk/professionals/accessibleinformation

The RNIB website has many other tools and resources for ensuring that meetings, websites, electric documents and images are accessible for people who are blind or people with low vision.

Who benefits from Clear Print?

Because Clear Print is designed to be used for all documents, it has far reaching benefits. A clearly designed and easy to read document will convey your essential information to everyone who reads it and in the process can convey a positive view of the originating individual or organization.

Top tips for achieving Clear Print:
- Document text size should be 12–14 pt, preferably 14 pt.
- The font you choose should be clear, avoiding anything stylised.
- All body text should be left aligned.

- Use bold sparingly, only highlight a few words rather than a paragraph.
- Keep the text layout clear, simple and consistent.
- Don't use blocks of capitalised letters, and try not to use any italics or underlining.
- Text shouldn't be overlaid on images.
- The substrate or coatings [of publications] should not be glossy or reflective.
- Ensure the paper is thick enough to prevent show through.
- The contrast between the text and background is as high as possible.
- All text should be the same orientation on the page.
- Space between columns of text is large enough to be distinct.
- Any information conveyed in colour or through images is also described

Some useful websites for producing accessible resources

- Source: keylist on accessible information and communication technologies: http://asksource.ids.ac.uk/cf/keylists/keylist2.cfm?topic=dis&search=QL_ICT12
- Global Web Accessibility Initiative: http://www.w3.org/WAI
- UK Office for disability issues: Producing better information for disabled people—A toolkit for local authorities: http://odi.dwp.gov.uk/docs/wor/imp/toolkit.pdf
- UK equality and human rights commission: web accessibility guidance: http://www.equalityhumanrights.com/footer/accessibility-statement/general-web-accessibility-guidance

Please note: when developing a new publication, it is not usually necessary to produce large quantities of alternative accessible formats (Braille, audio versions etc). However, you must (a) clearly offer to produce your publication in an alternative format on request; (b) ensure you have the necessary contacts and financial resources to be able to do this quickly on demand.

4. Conducting a literature review as a precursor to any lesson learning process

Why conduct a literature review?

Avoid duplication
Before starting your lesson learning process, it is important to identify what information already exists on the subject, i.e. documents produced by Handicap International but also other organisations.
If there are existing lesson learning documents on this subject, it is important to decide if there is real added value in developing another one. How will your lesson learning process complement existing documents?

Increase your own knowledge on the subject
Ideally the person carrying out the lesson learning process will already be familiar with the subject. However, in all cases, a rapid review of quality documents and resources on the subject (including those produced in the country context as well as international resources) will provide an important grounding for your lesson learning work and will strengthen the quality and relevance of your final messages. Key point: don't just collect the resources–try to read and organise them!

Enhance your final publication
A clear and concise bibliography of quality resources will certainly enhance your final publication, providing your target group with useful, practical resources to assist them in their work.

Timescale: Conducting a literature review is essential–but we recommend this as a rapid preparatory activity, lasting 5–10 days maximum.

How to conduct a literature review?

Guiding principles:
- Aim to collect 20 resources maximum.
- Only select resources which are specifically related to your subject.
- If possible, aim for a balance between resources that are specifically about the country concerned and those which are more global.
- Try to find a balance between policy and practice so that your resources provide both international standards and frameworks, as well as practical tools and manuals.
- Only select resources which are available in the language of your final publication and freely available online.

Step 1: Check Handicap International's internal website "Skillweb" for existing resources on this subject, especially 'lessons learned' or 'capitalization' documents.
SKILL web (http://www.hiproweb.org)

Step 2: Speak with the relevant Technical Advisor to ask for quality, relevant resources on the subject.

Step 3: Find relevant local publications: speak with relevant programme and technical staff and local experts (for example local/national universities) to find any important local resources on your subject. This could include national or local policy or legislation documents.

Step 4: Conduct web-based research (see next page for examples of useful websites).

Source: International online resource center on disability and inclusion: http://www.asksource.info/index.htm
Source is managed by Handicap International. It has an extensive online database, with many prepared annotated bibliographies or "key lists" on various disability/inclusion-related subjects.

Pubmed: http://www.ncbi.nlm.nih.gov/pubmed
Pubmed is a bibliographic database that covers all medical fields from the year 1966 to present. It contains over 21 million references from Medline, scientific journals and on-line books, mainly in English. Some articles are available online in full ("free articles").

Hinari: http://www.who.int/hinari/fr
The Access to Research in Health Programme (HINARI) is a database of the major periodicals covering the fields of medicine and biological social sciences. Access is free or at a very low rate for government services and non-profit organisations in developing countries. Most of Handicap International's local partners can have free access.

Making it Work good practice database:
http://www.makingitwork-crpd.org/good-practice-database
This website contains hundreds of examples of good practice case studies on various subjects related to disability and inclusion.

Mobility International's (MIUSA) online International Development and Disability (IDD) Resource Center:
http://www.miusa.org/idd/resources/topic/index_html

The Global Disability Rights Library:
http://www.widernet.org/eGranary/GDRL

Step 5: Organize and classify your resources: make a selection of the best 20 resources. To make this election, keep the target audience of your final publication in mind, i.e. which resources would be most useful for them? Make sure you have all the relevant information for each resource, i.e:
Title; author; publisher details; date of publication; document type; number of pages; language; weblink to access the resource online; target audience for the publication.

Then organize your resources into a list, trying to group similar publications together, for example, group them as 'policies'; 'manuals'; 'websites' etc.

Step 6: Try to read the documents and make notes so as to enhance the key messages of your final lesson learning publication.
It can be helpful to make a grid to analyze the different publications, for example:
- Title, author, date
- Document type
- Audience
- Subjects covered
- Main added value of the document
- What important information you think is missing in the document.

Step 7: Include your bibliography of resources at the end of your lesson learned publication.

5. Organising group workshops and/ or semi-structured interviews for lesson learning [7]

All lesson learning methodologies require group workshops or individual interviews, and often both. This tool provides some basic ground rules.

The first step is to ensure you have read **Tool 3** in this guide, "Ensuring Meetings, Interviews and Publications are Accessible for People with Disabilities". This is a **cross-cutting** issue, regardless of the topic, methodology or context.

Who will lead the lesson learning process?

The project manager and relevant project staff are central to the lesson learning process and must dedicate sufficient time to participate fully. It is the project manager who must coordinate the lesson learning process and oversee the outcomes / outputs. However, if resources are available, it can be effective to recruit an external consultant or support person to help facilitate meetings, interviews, data collection and perhaps writing the final lesson learning document. However, this external person must not be left to carry out the lesson learning process independently and should work closely with the team.
Whoever is in charge of capturing lessons learned / know-how has the responsibility of finding out exactly how change occurred. This requires constant 'pushing' of the individual or group to answer the question: "But how exactly did you do that?!"

Group workshops for lesson learning

Group workshops offer a dynamic approach for lesson learning, whereby a small group of people actively brainstorm ideas and reach a consensus view about how change occurred. They ensure a representation of diverse opinions and ideas, to cross-check and validate information. However, it is always necessary to balance a group, to ensure that everyone is participating fully and that the right people are present.
Most **detailed lessons learned reviews** are often carried out as a working group comprised of the HI project team and are then complemented with semi-structured interviews with external stakeholders/ partners. But it is also possible to invite external partners to participate in the main lesson learned working group, if they know the project well and can contribute effectively to the process.

Facilitation tips for working groups appear throughout this guide, specifically for Learning Papers and Detailed Lessons Learned Reviews.

Here are some general guidelines:
- In advance of the meeting, provide participants with relevant questionnaires or forms to fill in, so that they arrive well prepared to share their own views.
- At the beginning of the workshop, ensure that all participants are completely clear about the expectations of the session and how it fits into the whole lesson learning process.
- Ensure the group have some ground rules for respecting different opinions and avoiding of blaming specific individuals or organizations.
- If external partners/stakeholders are not part of the main working group, their views can still be captured, either through separate group meetings or semi-structured interviews. These views should then be shared with the main working group, to produce an objective and comprehensive account.

Semi-structured interviews for lesson learning

Semi-structured interviews are another method for gathering information, testimonies and feedback from key project staff and partners. They are particularly useful for documenting good practices, innovations and failure case studies (**Tools 7, 8, 9**). They can also be used to demonstrate specific lessons learned from a focus group discussion.
Semi-structured simply means an interview that is flexible, allowing new questions to be brought up during the interview as a result of what the interviewee says. The interviewer in a semi-structured interview generally has a framework of themes to be explored.

What protocol to use for interviews?
When researching a specific practice or intervention from a project, it is important to interview **several** stakeholders. This ensures that you are cross-checking the accuracy of the information and drawing out a consensus view about the most significant changes. For example, for a good practice case study, you should interview a **minimum of 3 different stakeholders** (for example 1 or 2 people who carried out the practices and 1 or 2 people who are supposed to have benefitted since from this good practice).

In advance of the interview or at the beginning:
- Introduce yourself and explain the information that you what to collect and how it will be used.
- Explaining that any information the interviewee does not want shared will remain confidential.
- Record the interview using a Dictaphone or digital recorder. Ideally, it is best to have two people at the interview, one person to ask questions and a second person for note-taking.
- If you photograph or film any of the interviewees, remember to get written authorization from individuals.
- Remember to write down people's contact information.

Guidelines for interviews
- Ask only one question at a time
- Ask open-ended questions rather than questions that have a yes or no answer.
- Try to ensure the interview flows like a conversation and follow-up on the information the interviewee is providing, rather than just going from question to question on your interview list.
- Use probing questions. For example, ask, "Could you say something more about that?" "Could you describe that in more detail?"

How to collect individual impact statements?

Lesson learning documents, especially good practice case studies, should include some individual testimonies or "impact statements" to document the opinions of beneficiaries about how a specific action or practice has changed their lives. **Essentially this is the only way to validate if a project or service genuinely achieved positive change.**

Some basic guidelines for gathering individual statements are as follows:
- Explain to the person you are interviewing that their testimony will be used within a case study which will be used publicly to support training or advocacy work.
- Explain to the person that the purpose of asking for their testimony is to check or verify the impact of the practice.
- Ask the person to explain how their day to day life has changed as a result of the practice/service you are documenting.
- Remember to gather both positive and negative experiences and ask the person for their opinion on how to improve or change the practice.

6. Learning paper

All Handicap International projects should incorporate some basic lesson learning in order to identify: what worked well; what didn't work so well; what we could do differently next time… Learning papers offer a rapid, 'light' version of lesson learning specifically for this purpose. The information is collected by project teams and then used by Technical Advisors, Desks and Programme Directors to improve or revise future project planning.

Any new projects developed by HI are strongly advised to check previous learning papers relevant to the topic/country (see Skillweb), so as to learn from previous experience. Learning papers should be completed at the end of a project and sent to the Knowledge Management Unit, please email: capitalisation@handicap-international.org

All learning papers are then shared internally via Skillweb. (Learning Papers can also be completed during the project [at mid-term] and then revised at a later date).

Facilitation tips

- Learning papers should be completed by a working group of people who really know the project in detail, i.e. the project team, but also external partners if appropriate.
- Note: some questions may be difficult to answer truthfully with certain partners present. As such, you can decide to work as one large group—or in separate groups, whichever is most appropriate.
- Learning papers are intended as a rapid lesson learning exercise. A workshop should last between 2–6 hours maximum. The final document should be approximately 5–10 pages.
- If the project covers several countries or zones, you may need to organise several workshops and then combine/merge feedback after.
- The learning paper has 15 standard questions, but it is possible to add others.

Suggested approach:

- A facilitator works with a group to consider each question in turn.
- Participants are asked to be completely honest and frank, but to avoid feedback which is critical of individuals or which is potentially damaging.
- Participants are asked to think about the entire project experience and not to focus only on recent events.
- For each question asked, participants are requested to write down (or consider) their own view for 10 minutes, before sharing with the rest of the group.
- Each question is then discussed for 20 minutes, with a consensus response written down.
- It is fine to include different viewpoints if consensus cannot be agreed.
- The final document (see format below) is completed during the workshop and emailed directly to the HI Knowledge Management Unit for sharing on Skillweb: capitalisation@handicap-international.org

A. Essential project information

Project title and location:

____

Project duration:

____

Overall project objective and main expected outcomes:

____

____

____

Name of person coordinating this learning paper:

____

Participants involved in responding to questions:

____

Does this learning paper relate to the whole project or a specific aspect within the project?

____

____

B. Learning paper questions

1. Describe at least 3 main successes from this project. What worked well? If possible, explain the facilitating factors...

2. Describe at least 3 main failures from this project. What didn't work so well? If possible, explain the causes...

3. Did this project lead to any unexpected changes/outcomes? Please give details (including why you didn't expect this to happen)

4. If you were to do the project again, would you change the project duration? If yes, why?

5. Would you involve different stakeholders or partners? If yes, who/why? (If possible list the partners you would choose to work with again, and those you would not)

6. Was the budget sufficient? If not, why not?

7. Did you have enough staff? If not, why not? What additional competencies would have helped this project?

8. What additional support from HQ might have helped?

9. How would you change the activities to make the project more effective? Could you suggest any new or different activities?

10. Would you change the order or sequence of activities? Why?

11. Overall, if you were to do the project again, what would you do differently? (You can refer to project design, planning, implementation, monitoring & evaluation)

12. Having completed this project, what do you think are the next logical steps for HI on this topic in this country? In what areas should we invest our time and resources? Who should we work with? What should we avoid doing?

13. Is a more detailed lesson learning process needed for this project? i.e. was there a specific good practice, innovation, approach or technique that is important to analyse in depth and then share with others?

14. Are there any tools or resources created by this project that would be useful for HI staff in other contexts? If 'yes', please give details and explain where these resources can be located.

15. Overall are you satisfied with the quality/performance of this project? Any further comments?

7. Good practice case study[8]

Your ToR/Action Plan should already have clearly identified:
- The specific subject and overall purpose of your good practice case studies.
- The primary target audience.
- How you expect to share the good practice case studies with the target audience.

This tool has 3 main parts:
A. A template for a writing up a good practice case study.
B. Advice and guidance for capturing information through semi-structured interviews or focus groups.
C. Advice on drawing out recommendations or conclusions from several case studies.

A. How to write up a good practice case study: template

Title and topic area
- Overall area of intervention, e.g. education or employment.
- The specific subject of the good practice + location where it took place.

Target groups
Specify which type of stakeholders should be interested by this case study and why.

Description of the context before the practice
Briefly explain the situation before the practice was implemented.

Description of the good practice
Explain how the good practice began and how it was developed: who was involved and what did they do?

Most significant changes
Outline the most significant changes resulting from the good practice–i.e. the key moments when actors or organisations changed their behaviour, relationships or activities.

Impact statements
Include quotations/testimonies of people who participated in, or benefitted from, the good practice–perhaps 2 or 3 testimonies.

Facilitating factors that made this practice successful
Explain the facilitating factors that allowed these changes to happen. Which actors or organisations were instrumental? Which of their actions were particularly important?

Barriers or challenges
Explain any difficulties or obstacles which were overcome or which still need to be overcome.

Analysis
How does this practice relate to the following generic criteria?
- **Demonstrable Impact:** clearly achieving expected results and recording positive impact. It is not only HI who validates the impact but also partners and beneficiaries.
- **Replicable:** a specific action, approach or technique which HI could feasibly replicate, adapt or scale up in other contexts / programmes.
- **Efficient:** a practice which is efficient in terms of time, finances, human resources.
- **Sustainable:** potential for local actors to be able to develop or sustain this action, approach or technique in the future.
- **Person centred:** practices related to service provision which respect the concept of individual users being actively involved in any decisions which concern them.
- **Conforming to the principles and benchmarks outlined in the relevant HI Policy Paper:** i.e. the practice could be something new or innovative for HI – but it must still conform to the overall philosophy outlined in the policy paper.
- **Conforming to a broader set of guiding principles and shared values:** e.g. general principles of the CRPD:
  • Respect for inherent dignity, individual autonomy including the freedom to make one's own choices, and independence of persons;

• Non-discrimination;
• Full and effective participation and inclusion in society;
• Respect for difference and acceptance of persons with disabilities as part of human diversity and humanity;
• Equality of opportunity;
• Accessibility;
• Equality between men and women;
• Respect for the evolving capacities of children with disabilities and respect for the right of children with disabilities to preserve their identities.

Recommendations
What would HI or other actors need to do to sustain or replicate this type of practice in this country?
If HI wanted to promote this practice in other contexts, what steps are recommended? (This should explain what could be needed to improve or strengthen the good practice).
With whom in HI do we need to communicate this experience and share our recommendations?

Contact information:
Include relevant contact information for the good practice including: contact name, organisation, address, phone number, email address and website address, etc.

B. How to research and document a good practice case study

Setting criteria
Before making field visits and interviewing different stakeholders, you need to make sure you have a common vision of what is 'good' regarding this subject, i.e. you need to establish some good practice criteria. As you can see, the good practice template has the following generic criteria:

- **Demonstrable Impact:** clearly achieving expected results and recording positive impact. It is not only HI who validates the impact but also partners and beneficiaries.
- **Replicable:** a specific action, approach or technique which HI could feasibly replicate, adapt or scale up in other contexts / programmes.
- **Efficient:** a practice which is efficient in terms of time, finances, human resources.
- **Sustainable:** potential for local actors to be able to develop or sustain this action, approach or technique in the future.
- **Person centred:** practices related to service provision which respect the concept of individual users being actively involved in any decisions which concern them.
- **Conforming to the principles and benchmarks outlined in the relevant HI Policy Paper:** i.e. the practice could be something new or innovative for HI – but it must still conform to the overall philosophy outlined in the policy paper.
- **Conforming to a broader set of guiding principles and shared values:** e.g. general principles of the CRPD:
  • Respect for inherent dignity, individual autonomy including the freedom to make one's own choices, and independence of persons;
  • Non-discrimination;
  • Full and effective participation and inclusion in society;
  • Respect for difference and acceptance of persons with disabilities as part of human diversity and humanity;
  • Equality of opportunity;
  • Accessibility;
  • Equality between men and women;
  • Respect for the evolving capacities of children with disabilities and respect for the right of children with disabilities to preserve their identities.

The person coordinating the case study collection should liaise with the project team and Technical Advisor to see how you can add to this list above. Perhaps you want to add some criteria which is very specific or practical for your subject.

Example: setting criteria for good practice case studies

Overall subject:
Education for children with disabilities

Specific subject:
Mainstream, inclusive primary education for children with disabilities in Burkina Faso

More specific/concrete criteria

- **What we are specifically looking for:** examples of mainstream schools effectively supporting children with different types of impairments to succeed in school; good retention rates for children with disabilities; mainstream school teachers being trained in disability issues and effective communication skills; parents of children with disabilities actively engaging with their children's education; disabled girls and boys successfully moving on to secondary mainstream education or vocational training.
- **What we are not looking for:** examples of children with disabilities in special schools; examples only of children with physical disabilities; children with disabilities being taught separately from other children in a mainstream school; all children with disabilities being grouped in the same class; children with disabilities simply accessing mainstream school (i.e. without checking retention rates).

Selecting practices to investigate

Once you have established the criteria (and the people collecting the information are all clear about this) you need to identify some specific practices which occurred during the project. This can be with a focus on Handicap International's own actions—or the actions of an external partner. The project team can probably think of several examples, so it is important to make a selection. The next step is to capture the good practices through field-based interviews. It is critical to interview multiple stakeholders for each good practice in order to get a more holistic picture. You should interview a minimum of 3 different stakeholders (for example 1 or 2 people who carried out the practices and 1 or 2 people who are supposed to have benefitted since from this good practice).

Check list—who to interview?

Will you interview the people responsible for implementing the practice? The decision-makers involved in supporting the practice? The providers of the service or programme? The beneficiaries?

Sample interview questionnaire
The following tool is an example questionnaire that corresponds to the Good Practice Case Study template. It is intended as a guide for field researchers during interviews or focus groups. The questions in this tool are not intended to be asked verbatim.

Remember to document basic information including:

Basic information
Name and contact information of person you are interviewing
Location of good practice
Date of interview
Permission for recording interview and re-using information in a case study publication

Things to think about
Can they be contacted for further follow up?
Is the practice taking place in one or multiple locations?
Is the interviewee willing to be recorded? Are they willing to allow you to use their quotes in your report?

1. Introduction: Description of the context before the good practice began
Please keep this section brief. This section of the interview should describe why there was a need for this practice.
Probe questions:
- What was the situation before the practice began? What were the challenges or difficulties being faced?
- Why was there a need for this practice?
- What changes was the good practice was trying to achieve?

2. Description of what the good practice is and how the good practice was developed
This section should provide a description of how the good practice was developed. This section should tell how the good practice began, who was involved in this and the factors that allowed them to begin the good practice.
Probe questions:
- Please describe the practice.
- How did the practice begin?
- What was the main catalyst or motivations for initiating this practice?

3. Most significant changes
In this section, we are trying to understand what the most significant changes are that have happened as a result of the practice. This section should also answer the question: Why was there a need for this practice?
Probe questions:
- What kinds of changes have taken place since the practice began?
- In your opinion, what were some of the most significant changes? Please explain why...
- Since the practice began, which individuals, groups or organisations have been most affected?
- How did they change? What are they doing differently?

4. The factors that made this practice successful: Understanding the change process
In this section, we are trying to gain an understanding how these changes took place and what the factors were that allowed these changes to happen.
Probe questions:
- Looking at the most significant changes, in your opinion, what was it that allowed these changes to happen?
- What were the key factors that facilitated these changes? (e.g. Supportive government, supportive community, strong legislation, an individual who championed disability inclusion, policy or strategy on disability inclusion, ratification of the CRPD, strong advocacy for change from DPOs, grassroots momentum for change, international donor support, international development agencies supporting disability inclusion in development etc.)
- Who specifically helped facilitate the changes?
- How were they able to do this?

5. Analysis

In this section we want to see how this practice conforms to a wider set of criteria. This may be difficult for the interviewee – but it is possible to try to discuss this.

Probe questions:

- In your opinion was this practice replicable, efficient, sustainable, person centred...?
- According to these different criteria, in what areas could this practice be improved?

6. Recommendations

In this section we want to know the interviewee's opinion on how they think this practice could be sustained or adapted/ replicated elsewhere.

Probe questions:

- In your opinion, what are the key factors in order for this practice to be sustained? Who needs to be involved? How should they be involved?
- If another group wanted to replicate this practice in another region or country, what advice would you give them? What would you want them to know before they begin?

Gathering testimonies from beneficiaries of the practice

For each good practice, a key part of the information collection process is hearing directly from people who benefitted from the practice to learn how this has impacted them and what was significant for them in their lives. We recommend interviewing at least three people.

Probe questions:

- How were you involved in this practice or how did you learn about the practice in the first place?
- What were the most positive things you experienced from the practice?
- What has changed for you?
- Who wasn't part of the practice who you feel should have been?
- Do you believe this is a good practice? Why or why not?
- What would need to change in order to make the practice better?

C. Collecting and analysing several case studies

Your ToR/Action Plan have already identified how you expect to use your case studies, i.e. what type of final document and for what purpose. As stated, it is possible to collect just one case study and use this to enhance another document (for example a presentation or training material). However, there is real added value in collecting several case studies on the same topic, making a comparative analysis, and then developing conclusions and recommendations about how to sustain, adapt or replicate good practice in different contexts.

Documenting several case studies offers a very practical approach for bringing together practitioners and experts on a single issue, and using real-life experience to stimulate discussion, debate and recommendations for future programming. **The recommendations developed will depend very much on the primary target audience for your final publication.**

Developing recommendations: comparative analysis of several case studies

The following questions can be asked when comparing several case studies—with a view towards identifying the overall trends and developing some recommendations:

- **What were the main catalysts for initiating the practices?**
  Donor funding? Civil society-led initiative? An individual activist or champion? Government initiative? Community-led initiative?
  What are the similarities or difference between the different practices collected? What trends can be identified?
- **What were the main facilitating factors that allowing organizations or individuals to carry out the practices?**
  Technical knowledge? Donor funding? Support from other organizations/networks? Knowledge on disability issues?
  What are the similarities or difference between the different practices collected? What trends can be identified?
- **Who was driving this good practice? Who else was actively involved?**
  People with disabilities? Women with disabilities? DPOs? Parents/families? Community members? Local authorities? National authorities? Service providers? NGOs? Development organizations?
  What are the similarities or difference between the different practices collected? What trends can be identified?

Once you have analyzed these trends from all of the good practices, it is important to form some overall recommendations and key messages. These should be directly oriented to the primary target audience for your final publication. (Please **see Tool 10** as an example of how case studies can be used for a Handicap International thematic seminar).

8. Innovation case study

The process of documenting innovations from HI projects is broadly the same as for Good Practice Case Studies. As such, please refer to the interview preparations and questions in the **Tool 3** and the specific advice in **Tool 7**—which can easily be adapted for innovation case study collection.

However, it is important to point out some key differences:

- For **Good Practices**, the objective is to document specific actions from projects which provide a clear example of HI policy or positioning on a given subject.
- For **Innovations**, the objective is to show something new or different from HI standard approaches, which could possibly shape our future response in certain situations.

Example A: a practice which is innovative or different from HI's standard approach

Overall subject: Training for rehabilitation workers.

Specific subject: Continuous professional education.

HI standard approach
For strengthening the capacities of rehabilitation professionals, HI usually makes a local assessment of the training needs. Professional training is then delivered in-person and is usually discipline specific (i.e. separate trainings for different types of rehabilitation professionals). The training responds to service user's demands and tries to integrate competences that are usually not included in formal trainings, by means of locally-tailored modules and direct supervision by international experts.

HI innovative approach in South Asia
A regional pilot initiative to strengthen the rehabilitation sector has been set up in 4 Asian countries: Bangladesh, Afghanistan, Sri Lanka and India (Orissa state).
Whereas the assessment for training needs is usually done directly by HI, for this project the existing national professional associations have directly identified their training needs. The professional training has been developed in modules that can be highly useful to several rehabilitation profiles (Physiotherapists, Occupational therapists, Prosthetists & Orthotists...) rather than separating these into different groups. This multi-disciplinary approach develops collaboration and exchange and serves to develop the entire rehabilitation sector and not only specific areas within it.
The regional aspect of the project has made this possible, because it ensures that there is a wide variety of rehabilitation professional profiles to participate in the trainings. Modules have been delivered both through face-to-face and distance learning modalities.

Example B: a practice which is innovative or different from HI's standard approach:

Overall subject: HIV and AIDS

Specific subject: Accessibility and inclusion of people with disabilities in HIV and AIDS at services level.

HI standard approach
HI's standard approach to ensuring inclusion of people with disabilities in various HIV/AIDS services is to build the capacity of health and HIV-related service providers on disability issues. This includes supporting the adaptation of information, communication and education materials so that they are accessible to people with different impairments, as well as increasing the awareness of women, men and youth with disabilities on the risks and vulnerabilities related to HIV and other sexually transmitted infections.

HI innovative approach in Mali and Senegal
For a regional HIV project in Mali and Senegal, HI has piloted a new approach to ensure the inclusion of people with disabilities in voluntary testing and counselling services.
It involves developing micro-projects whereby an HIV-related service provider is paired with a disabled people's organisation. Many of these pairings have now been set up to encourage sharing of expertise and experience and to develop joint work on a local accessibility initiative.
To ensure quality of implementation, a multi-stakeholder committee was created for selecting and monitoring the best local initiatives to be funded. As a result of this process, the various organisations involved were sensitised to each other's strengths and challenges. They improved their understanding on the rights of people with different impairments in relation to HIV and greatly increased the outreach capacities of HIV testing and counselling services to be accessible and responsive to the needs of people with disabilities.
Concretely, 22 voluntary testing and counselling centres participated in the project; 91 outreach activities and hundreds focus group discussions improved the awareness of more than 20,000 women and men with disabilities; this was followed by extensive HIV testing and counselling provision.
This has been a breakthrough in the inclusion of people with disabilities, most of whom had been excluded from communications regarding the risks of HIV infection.

Ways forward and potential opportunities
This innovation is something that could be analysed for replication in other contexts so to maximise the inclusion of people with disabilities at HIV service provision level.
For example this pilot could be adapted in Eastern and Southern African countries where HIV prevalence is much higher and where the reach of disabled people's organisations is stronger.

Important to remember: an innovation is not necessarily an invention. It is simply trying a new approach or technique to achieve positive results in a given context. The purpose of the case study is to open up a new experience for wider discussion, to identify if there is any value in testing the approach in other contexts or even revising HI's stand policy/positioning.
As with good practice case studies, it is certainly possible to capture just one example of an innovation. But often the real added value is to compare and contrast several examples, and to develop a more rigorous analysis. To do so, again please follow advice given for Good Practice Case Studies.

Innovation case study template

Title and topic area

- Overall area of intervention, e.g. education or employment.
- The specific subject of the innovation + location where it took place.

HI standard approach

Explain how HI normally addresses this subject (i.e. standard practice, policy or norms for the particular country).

Description of the context in which the innovation took place

Briefly explain the situation before the innovation was implemented.

Describe the innovative practice

Briefly explain why innovation was needed in this area. Explain who developed the innovative approach and the steps they took. Explain how this is something different, new or innovative for HI—i.e. how is it different from what HI normally does?

Most significant changes

Outline the most significant changes resulting from this innovation i.e. the key moments when actors or organisations changed their behaviour, relationships or activities.

Impact statements

Include quotations/testimonies of people who participated in, or benefitted from, the innovation—ideally 2 or 3 testimonies.

Facilitating factors that made this innovation successful

Explain the facilitating factors that allowed these changes to happen. Which actors or organisations were instrumental? Which of their actions were particularly important?

Barriers or challenges

Explain any difficulties or obstacles that were overcome, or which still need to be overcome.

Recommendations: what can HI learn from this innovation?

What does this new approach suggest for HI policy/practice on this subject? What would we need to do to further test or scale up this innovation?
What would HI or other actors need to do to sustain or replicate this innovation in this country?
If HI wanted to replicate this innovation in other contexts, what steps would you recommend? (This should explain what could be needed to improve or strengthen the good practice).
With whom in HI do we need to communicate about this experience—and share our recommendations?

Contact information:

Include relevant contact information for the good practice including: contact name, organisation, address, phone number, email address and website address.

9. Failures and challenges case study

Documenting and analysing failures from development/humanitarian interventions is rarely done, and yet it can be extremely useful for organisational learning and future programming.
In line with various international initiatives on this issue[9], we use the term "failures". Essentially this just means any major difficulty, challenge, barrier or obstacle, which was either overcome during a project or which continues to be a problem.
The format proposed here is a fairly rapid analysis of failures/ challenges, to be produced as a short case study. If a more in-depth analysis is required, we would recommend a detailed lessons learned review.
In this guide, failure case studies are grouped with good practice and innovation case studies. However, given that the content is often quite delicate or complex, a different approach is often required.

Tips for implementation

- From your ToR/ Action plan you have already identified the purpose/context for documenting a failure case study.
- Most often, you will document a failure case study as part of a wider lesson learning process, for example an HI seminar publication (**see Tool 10**) whereby several good practices, innovations, and failures are documented and analysed in relation to a specific topic.
- Capturing information about project failures can be complex. Ideally the process should be facilitated by somebody neutral who can orientate a group towards a more objective analysis.
- Failure case studies can be approached through individual semi-structured interviews, but small group discussion is often the most dynamic form of exchange.
- Most often, it will be a small group if HI project staff, but it is possible to invite certain external stakeholders if you have worked closely with them and can discuss freely and openly.
- The process must instead be constructive and solution-focused, i.e. not blaming certain individuals but trying to looking at systems, procedures and how they could be improved.
- Perhaps the best method is to organise a small working group to go through the questions in the failure case study template (see below). The group considers each question in turn and then individuals are asked to write their own response before sharing with the wider group. The objective is to try to reach a consensus view of what occurred, why, and how it could be best avoided or mitigated in future. If consensus cannot be reached, it is fine to write down the different views.
- Even if the final case study is written up by one individual, it is important that it is validated by the working group concerned.
- The final document can be used by the programme team and Technical Advisor in various ways to discuss and review how future programming can incorporate this learning.

Failures and challenges case study template

Tilte and topic area
- Overall area of intervention, e.g. education or employment.
- The specific subject + location where it took place.

What is the main objective of the whole project?
Briefly explain the overall project, the main the activities planned, and the rationale behind them.

A failure or major difficulty experienced
Describe a specific failure or a major difficulty encountered. Explain what went wrong.
Has this difficulty previously been encountered in this project/programme/country or was this the first time?
How did this failure affect other aspects of the project/programme? What was the impact?

Analysis
Try to explain why these problems occurred—think through different factors (environmental, socio/economic context, systems, procedures…). What could HI have done to better anticipate these problems? What could HI have done to react better to these problems?

Measures taken
Were any measures taken to address this problem? Describe them—and explain which were successful and which were not?
To what extent was the problem overcome? To what extent is it still a problem today?

Recommendations: what can HI learn from this failure?
What does this experience suggest for future HI policy/practice on this subject?
In general, if we want to avoid such difficulties in future, what steps need to be taken?
In general, if we want to respond better to these types of challenges when they emerge, what steps should we take?
With whom in HI do we need to communicate this experience and share our recommendations?

Contact information:
Include relevant contact information including: contact name, address, phone number, email…

10. Example case studies compilation during a Handicap International thematic seminar

This example relates to a planned Handicap International seminar on inclusive education for 2013. It demonstrates how it is possible to use case studies as a way to mobilise a group of practitioners during a seminar, to create a live and dynamic lesson learning process. However, the contents have been very much adapted for the purposes of this guide.
Please note: Although this approach focuses on case studies, it is also possible to use Learning Papers (**Tool 6**) as a tool for thematic seminars to facilitate learning exchanges between project staff from different countries/regions.

Overall objective of the seminar

To bring together HI inclusive education project managers from many different countries and contexts, as well as some international experts, to develop a common understanding of what disability inclusion in education really means and how this can translate effectively into our day-to-day work.

Specific objectives of the seminar

- To present and discuss Handicap International's 2012 policy on Inclusive Education.
- To exchange good practice case studies which demonstrate this policy in action.
- To identify innovations and new approaches which could influence future policy and programming.
- To discuss our failures and operational difficulties and how they can be overcome.

The seminar is to be organised as follows

- The inclusive education Technical Advisors identify some key topic areas from the policy which could be discussed in detail during the seminar.
- HI education Project Managers (from 12 different countries) review the topic areas and offer some summary examples of good practices, innovations or failures from their projects, which could be developed into case studies.

Aspect of inclusive education	**Good practice case study**: a specific action or activity from the project which clearly demonstrates HI inclusive education policy in action	**Innovation case study:** a specific action or activity which demonstrates a totally new approach for the country/context–which could lead to new education policy ideas	**Failure case study:** a specific failure or major challenge from the project difficulty that was overcome–or which needs to be overcome
Child-centred approach	e.g. Togo	e.g. Cambodia	
Community approach			
Multi-sector approach			
Gender-inclusive approach			
Working with parents and parent/family groups	e.g. Morocco		e.g. Burkina Faso
Working with DPOs	e.g. Togo		e.g. Niger
Working with Special Schools		e.g. North Korea	e.g. Senegal
Working with severely disabled children in mainstream schools			
Teacher training	e.g. Vietnam	e.g. Burkina Faso	
Working with policy or decision makers			
Links with non-formal education			
Positive local inclusive development			
Links with rehabilitation sector	e.g. Algeria		e.g. Indonesia
Links with Employment/ Vocational training/ Livelihood sector	e.g. Madagascar	e.g. Kenya	
Links with health services/ HIV sector			
Education for children with disabilities in an emergency/ conflict			

Please note: the countries in this table have been placed at random, just to give an example.
It is not an accurate reflection.

Process cont'd...

- Based on the feedback from project managers, the Technical Advisors select 6 priority topics.
- For each topic, 2 countries each document a case study. Case studies can be a good practice, innovation, or a failure[10].
- Project teams use the tools 7, 8, 9 in this guide as a way to capture and document their case studies.
- During the seminar, each topic is explored for at least half a day. This includes a presentation of the 2 case studies followed by discussion by working groups.
- Participants are asked to share their own field-based experiences of the topic. The group draws out the main trends from the different experiences and writes up global recommendations and key messages.
- Following the seminar, a publication is produced, to present all 12 case studies along with the feedback and recommendations from the seminar discussions.
- The final publication is used as a basis for training HI inclusive education project staff and also as a tool for advocacy in various national and international level fora.

11. Detailed lessons learned review

The overall objective of a detailed lessons learned review is to make an in-depth, multi-stakeholder analysis of how change occurred within a project and how the experience could be modelled for adaptation or replication in other contexts.
There are six main steps to this methodology, each of which will need to be adapted to the specific circumstances and priorities of your project. Please contact the Knowledge Management Unit if you require additional support with this.
A detailed lesson learned review requires in-depth discussions with the HI project staff and partners who know the project well. In your Terms of Reference you should have identified the specific people/organisations to take part in this process.
In general, detailed lessons learned reviews mainly involve workshops with the relevant HI project team. However, external partners can be included in this group, or they can be interviewed separately in order to gather important testimonies/feedback on the project experience.

Before starting, please check you have:

- developed comprehensive Terms of Reference with clear objectives, target audience, expected outcomes;
- ensured that the necessary resources are in place (financial, technical, time);
- consulted with relevant Operational Managers, Technical Advisors and the Knowledge Management Unit;
- read the preparatory tools in this Guide (**Tools 3, 4, 5** on accessibility, literature reviews, and workshops & interviews);
- arranged for someone to facilitate and lead the whole lesson learning process– ideally the project manager, but perhaps working with an external consultant.

Step 1 of 6: start with a learning paper

A Learning Paper, as featured in **Tool 6** of this guide, is an important first step for orientating your group towards lesson learning and thinking subjectively about their project experience. Also, it will help you to select a specific subject for more detailed lesson learning. Please follow the guidelines provided.

In summary, the Learning Paper requires a group meeting/workshop and should take around 2–6 hours to complete. It can subsequently be disseminated on Skillweb as a separate, internal document to summarise the some of the main learning from the whole project.

Having completed a learning paper, you then start a more detailed lesson learning process…

Step 2 of 6: identify the what: key moments/most significant changes

Steps 2 and 3 also need a meeting/ workshop—but for a longer period of time (suggestion: at least 2 to 3 days but can be carried out over several weeks).

Remember: your Terms of Reference have identified the specific aspect of the project that you will focus on. Your project team need to keep their focus on this throughout Steps 2–6.

Start by drawing a timeline of the project. Depending on your ToR this can be for the entire project duration or for a particular period of time. You need to have a large image of this timeline because you are going to add notes to it. Perhaps join several pieces of flipchart paper together or use a large whiteboard. Ask the group to identify approximately 5 key moments concerning the specific topic.

Start of project

End of project

Key Moments are the Most Significant Changes, i.e. the times when the project moved forward significantly or underwent major changes. In particular, this refers to the elements which were essential to the project's success, but can also include problems or barriers that had to be overcome.

This is a brainstorming activity. Ask participants to write down their own views (perhaps on Post-it notes) about the key moments during the project. Afterwards, you can ask participants to post their notes along the timeline. You then discuss together as a group and make a selection.

Remember, the facilitator really must push the group to think beyond the logical framework and the standard expected results. You are not listing all of the project activities. You are focussing on one specific aspect of the project and ask the following types of questions, covering 3 key areas:

1. Changes in behaviour:

- Try to think for he biggest changes that occurred during the project. In particular, what were the main changes in behaviour, relationships or activities of key partners and stakeholders?
- At what times did key partners or stakeholders really understand the project and start to play an active role? When did this project start to become successful?

2. Resolution of conflicts or overcoming barriers:

- What were the major conflicts or problems during this project?
- When did they happen?

3. New or innovative approaches or tactics:

- Were there times when the team tried a different approach or tactic to convince or influence a key stakeholder or to move the project forward?
- Were there any times where we had to think of solutions to difficult problems that had been preventing the project from moving forward?

- Did the project team need to learn any new technical skills or approaches during the project? What were they?

Choose approximately 5 KEY MOMENTS and write each one up as a short paragraph.

Step 3 of 6: identify the how: i.e. Success factors

Having identified a list of key moments, you now think in detail about how they were achieved.
For each key moment, think of 3 **success factors**. These are: the specific actions or interventions that happened to make this moment an event for moving the project forward. This includes the actions of HI staff, but also the actions of external stakeholders and partners.
Here you are going further from simply explaining WHAT happened in the project. You are now explaining HOW it happened. This analysis should help you to see the skills, competencies and know-how developed during the project. Again, you are not listing the planned project activities—you are thinking about the additional actions or interventions that occurred during the project to make it a success.

For each of the Key Moments identified, ask yourselves the following types of questions, again covering 3 areas:

1. Changes in behaviour:
- To achieve the most significant changes in behaviour, relationships and activities of key stakeholders or partners, what exactly did we do?
- How exactly did we manage to convince a particular organisation or person?
- What did the key stakeholders and partners do themselves to achieve change? How did they key influence each other? How did we influence or support key stakeholders and partners to do this?
- Whose actions led to the most significant changes?
- What are the main factors that enabled the key partners or stakeholders to really understand the project and start to play an active role? Break this into further detail—how exactly did we do this or facilitate this?

2. Resolution of conflicts or overcoming barriers:
- For each major conflict or barrier experienced during the project, what exactly did we do to resolve them?
- What did our key partners/stakeholders do?

3. New or innovative approaches or tactics:
- Aside from the planned project activities, what exactly were the new approaches or tactics we used to convince or train a key stakeholder or to move the project forward?
- How did we develop these approaches?
- Did the partners/stakeholders develop any new approaches/tactics themselves? How did they do this?
- For the times when we had to think of solutions to difficult problems, what exactly did we do? Who did we talk to? Who helped us?
- What did the partners and stakeholders do to resolve difficulties? How did you help them to do this?
- For the times when we had to learn new skills or develop new competencies, how did we do this? Who supported us?
- What about the partners and stakeholders—did they bring any new competencies or know-how to the project?

For each key moment, write up at least 3 success factors. Go into as much detail as you can.

Before moving on to step 4 below—try to capture feedback from external partners/stakeholders (if they were not present in the workshops for steps 2, 3, 4). Please use **Tool 5** in this guide to help organise your interviews.

Step 4 of 6: summarise your learning from steps 2 and 3 and draw out generalisations

This step requires more time: perhaps several meetings/discussions, followed by individual work by the person leading the lesson learning process. The aim is to try to summarise your learning so that is understandable for HI staff and external organisations working in other cities, regions or countries.
This is a complex process that requires thinking objectively. You can ask colleagues from outside the project team or country to help check if your summaries/generalisations are clear enough for an external audience. Look back at your lessons learned from steps 1, 2, 3. Compare this to the feedback that you have gathered from external partners/stakeholders. Where are the similarities/differences? Does the view of the HI project team correlate with external partners/stakeholders? Do you need to revise or add to what you have written for steps 1, 2, 3?

Look back at what you have finalised for key moments and success factors. Try to pull these points together and write them up in detail using the following structure. Please note: here we are using an example of an HI project in the Philippines:

1. In order to develop effective diabetes services in the Philippines, the following changes in behaviour, relationships and activities of key stakeholders have proved essential to our project's success:

   ____

   ____

   This is how these changes were achieved:

   ____

   ____

2. During the HI project in the Philippines, the following types of conflicts or barriers were experienced:

   ____

   ____

   This is how these conflicts and barriers were addressed:

   ____

   ____

3. In order to successfully develop diabetes services in the Philippines, the following new or innovative approaches/tactics have proved to be particularly useful:

   ____

   ____

   This is how these new approaches or tactics were developed:

   ____

   ____

For each of the above–please try to incorporate the feedback of your partners/stakeholders. This can be testimonials/quotations etc. If the partners or stakeholders had a different opinion, no problem, you can include this also.
At this point, it is also possible to include some case studies as further examples. Please refer to Tools 7, 8, 9 on Good Practices, Innovations and Failures. It can be highly interesting to elaborate your final lessons learned review with specific examples, although this is, of course, optional.

Step 5 of 6: practical recommendations

The objective here is to develop some concise recommendations that are specifically designed for your target audience, to help them to be able to sustain, adapt or replicate what you have achieved–**whether this is one specific aspect of your project or the entire project model.**
You are moving away from very specific lessons learned and thinking about more general recommendations which could apply to HI teams working in other countries or contexts. This step requires sufficient time to develop properly: minimum 3–4 weeks to carry out meetings or workshops and write up the document. It is important to contact the relevant Technical Advisor and Technical Coordinator, to validate the final

recommendations so they are useful and relevant to the wider organisation.
The practical recommendations usually cover all aspects of the project cycle, from design, planning, implementation and monitoring & evaluation. See the outline below which draws on the example of an HI project in the Philippines. Here the recommendations help to model the entire project–but please note–it is also possible to focus only on one specific aspect of a project.

EXAMPLE PRACTICAL RECOMMENDATIONS GUIDE: How to develop effective diabetes services in the Philippines based on HI's project experience, 2007–2012.

For each of the following, based on the feedback from steps 1–4, ask the team to develop a guide that addresses the following questions:

Section 1: design/planning

- What are the main outcomes/impacts to be achieved for this type of project? What changes can we realistically expect?
- What type of context (in terms of existing systems, services, practices) is well suited to developing this type of project?
- What are the key issues to be researched when carrying out a feasibility study/ baseline analysis/scoping mission?
- What are the key considerations when deciding the geographical scope/location of this type of project?
- Which actors should be involved in planning this type of project?
- What technical support is required for the planning and implementation?
- Who are the key local stakeholders for this type of project?
- What type of partnerships should be considered?
- What staff are required for this type of project? What competencies are needed?
- Are there any key practical/ methodological tools or resources that are particularly useful for developing this type of project?
- What is a reasonable timescale for developing this type of project?
- What are the key budget considerations?
- What monitoring and evaluations strategies are recommended for this type of project?

Section 2: implementation
There are different options for this part. Perhaps best is to develop a model logical framework and implementation plan for this type of project and to complement this with additional explanatory notes (in particular to explain activities and indicators). To do this, you can use the project's original logical framework as a basis, and then heavily update and improve it, based on everything that the project team has learned since.
It is also possible to add here some good practice case studies as examples.

Section 3: monitoring & evaluation
Again there are different options available for this part. You need to suggest concrete methods for both monitoring and evaluation, according to your project experience. Look back at the ways in which you verified the project's progress and measured its final impact. How could this be improved?

Section 4: summary of lessons learned from HI's experience in philippines
Copy and paste what you have written for step 4 above.

Step 6 of 6: Re-package any quality resources produced by the project

As a final step of this process, you may consider drawing together the key tools and resources developed by your project, if you have not already done so. This information can be a useful complement to your final lessons learned publication.

Please note: this step is optional. It should only be carried out if a project has generated resources, tools, or manuals that the Technical Advisor or Technical Coordinator think are good quality and highly relevant to your final publication. Indeed, if there is a large volume of tools and resources you may consider producing this separately from your lessons learned publication as a "Project Toolbox".

Main activities required:

- Creating an archive of the key resources produced during a project should be a fairly rapid exercise. Approximate timescale = 2–4 weeks.
- Gather the important publications, tools and resources that were generated by the project (for example: training manuals, project presentations, practical tools and resources, evaluation documents). These resources can be written publications, audio visual resources, websites, etc.
- Select the most useful and important resources (only those relevant to your final lessons learned publication and suitable for wider dissemination).
- 'Clean' the documents, i.e. remove confidential or highly context specific information and producing a version which has relevance and value to people working in other contexts.
- Write a summary for each document, explaining what it is and how it can be used.
- If you decide not to include your resources in your final lessons learned publications, but would still like them to be shared across the HI network, Skillweb offers a centralised place to store and share key project documents. For each thematic area there is already a list of projects by country. Project documents can be posted here, for example: http://www.hiproweb.org/fr/accueil/secteurs-de-competence-et-dactivites/sante-et-prevention/vihsida/projets/liste/burundi.html
- To put your lesson learning publication on Skillweb please contact HI's Capitalisation Manager at: capitalisation@handicap-international.org

You have completed your detailed lessons learned review and can prepare your final publication.

12. Formalise and publish your learning

A. Format options/guidelines

Having captured your lessons learned, it is necessary to publish them in some way. The format of your final publication was planned as part of the original Terms of Reference (Tool 1). However it is important to revise this as you go along the process. There are various formats to consider, but in all cases it is essential to select a format that is relevant for your target audience; that will help achieve your expected outcomes; that is not too long and detailed so as to dissuade people from actually using it!

Think about your target audience: what format would be most useful? For example, if your primary objective is to use your lessons learned to deliver training to HI project teams, your final publication could be formatted as a training manual (PowerPoint presentations, workshop exercises, etc).

However, it may also be necessary, depending on the resources available, to re-package your final publication for secondary audiences. For example: you have published your lesson learning as a 50 page technical publication for HI teams working on HIV and AIDS in East Africa. However, you also want some of your key lessons learned to reach local stakeholders in rural communities. In this case a formal written publication is of little value, but some of the key contents could be re-packaged to much greater effect as a film in a local language, a theatre play, a radio spot or poster presentation.

Looking back at the methodologies proposed in this guide, here is a basic summary of possible formats:

- a **Learning Paper** should be an electronic document, in Word format, 5–10 pages maximum.
- **Case studies** (whether a single case study or a compilation) are often first documented as short written publications, but can also be formatted as short films, podcasts, radio spots, etc.

- A detailed lessons learned review is most often produced as a written publication, usually 30–50 pages. However, some aspects of detailed lessons learned reviews can be adapted as a film, podcast, training manual, website[11], CD-Rom, etc.

Handicap International programmes are free to choose the format, layout and design of their lessons learned publications. For this purpose they can use the 'Author's Guide', an HI practical guide which provides all the necessary information for managing the publication production process.[12]

If the Technical Advisor has been heavily involved in the lesson learning process, the final document is sometimes published as a Professional Publication, as part of the collection "Learning Lessons from Experience". These publications follow a specific production process: http://www.hiproweb.org/en/home/knowledge-management/publish/publications-process.html

However, any lessons learned publication can be re-formatted as a "**Professional Publication Satellite Document**" if validated by the Technical Advisor. In this case, the Knowledge Management Unit (Publications Team) can help to rapidly reformat the publication into this collection, to encourage diffusion across the HI Federation.

Checklist for all lessons learned publications produced by Handicap International:

- Ensure that your key messages are in line with Handicap International's policy/positioning on the subject concerned. Confirm this with the Technical Advisor and use the relevant HI policy paper for guidance.
- Ensure that your final publication follows basic accessibility standards—see Tool 3.
- Ensure that your publication conforms to Handicap International's rules concerning visual identity: see the Handicap International Mission Statement and Visual Identity: http://intranet/images/stories/MISSION/MissionChampPrincipes_201201_EN.pdf
- Ensure that you follow other basic principles for producing a publication: see Handicap International's "Author's Guide": http://www.hiproweb.org/uploads/tx_hidrtdocs/PG06_TheWritingProject.pdf

B. Standard publication format: "learning lessons from experience"

Here we offer a standard layout for an HI publication "Learning Lessons from Experience". This corresponds to the methodology "detailed lessons learned review", i.e. Tool 11 and it follows the example Action Plan in Tool 2.
There is no obligation to follow this exact structure. Indeed it will always necessary to adapt it to the specific priorities and context of your project.

Structure of final publication[13]: Example Project: Disability Inclusive Public Health Services, Gujarat, India
Lessons learned objective: to train and support HI project bases in other parts of India, as well as other technical staff working in South Asia to be able to adapt or replicate this successful project model.

Section of the publication	Proposed contents
Introduction Approx. 2–3 pages	Explain that this publication is an output of a lesson learning process regarding a project for Disability-inclusive Public Health Services in Gujarat, India. Briefly explain the overall objectives, primary target audience and expected outcomes of this lesson learning process and specifically, how this publication can be used.
Principles and Benchmarks Approx. 5 pages	Briefly define Public Health Systems. Explain why this is an important issue for people with disabilities and why it is an important issue for HI (i.e. how this relates to HI's work more broadly). Briefly describe the public health system in India and then specifically for Gujarat. Explain the main barriers for people with disabilities when accessing public health services and the specific needs identified–i.e. the reasons for carrying out the project in the first instance.
Overview of the project Approx. 5 pages	Give a brief general overview of the project (duration, location, main expected outcomes). Briefly explain that this project has been very successful and that technical and operational colleagues in HI, as well as external partners, have asked about how to adapt or replicate this model elsewhere in India and perhaps more widely in South Asia.
Lesson learning process and summary of findings Approx. 10 pages	Briefly explain how you generated the lessons learned, i.e. explain the detailed lessons learned review process that you conducted, the various meetings and workshops held, and the stakeholders involved. Present the main lessons learned from Gujarat project. Briefly explain how the lesson learning process has led to creation of Practical recommendations–so that HI and other organizations can replicate this model in other contexts.
Practical recommendations Approx. 20–25 pages	Write a clear, concise tool: "How to develop projects to promote disability-inclusive public health systems, based on the experience of HI in Gujarat, India". This section is organised into 3 sections: Planning this type of project; Implementing this type of project; M&E for this type of project. Include any case studies captured as part of your lesson learning process: see Tools 7, 8, 9.
Conclusion Approx 1–2 pages	Explain how you expect this publication to be used. Perhaps add concluding remarks by the relevant Operational Manager and Technical Advisor, about the value of this experience and how it can be used for future programming.
Appendices Approx 10 pages	Part One: Create a bibliography based on your Literature Review: see Tool 4 in this guide. Part Two: Create a "toolbox" of key practical tools and resources generated by this project: see Step 6 of Tool 11.

All lesson learning publications can downloaded from Skillweb: www.hiproweb.org

C. Using film to present lessons learned

Films can be a powerful and engaging medium for sharing lessons learned from a project. They work particularly well when sharing specific good practice and innovation case studies. For a **detailed lessons learned review** it is usually necessary to narrow the focus to a very specific aspect in order for the film to be effective.

Films tend to work well with subjects that are highly visual, whereby key messages can be demonstrated visually, for example, filming a specific physio/rehabilitation technique or an accessible water and sanitation installation.

Film offers a way to present the real voices of knowledge holders without going through a written format which often loses authenticity and can seem very "Northern-centric". As such, film is a tool to effectively transfer knowledge from, and to, communities with predominantly oral cultures.

Films are very useful for awareness-raising around a specific issue. They can provide an excellent entry point for engaging key actors and agencies on a subject and starting to influence attitudes and behaviours.
Films can be used to complement technical trainings and practitioner seminars, but they often lack sufficiently detailed technical information and therefore need to be part of a broader set of tools and resources (training manuals, guidelines etc). As such, the key issue with any lessons learned film is finding a good balance between a communications style (which is engaging for a wide audience range and which promotes the organization in a positive light) and the technical content (having sufficient practical information and expertise so as to be interesting for practitioners).

The following sets out main tips to consider before making a lessons learned film:

1. Making a film is a highly technical process. You will need to recruit someone with the appropriate technical expertise and equipment to manage the process. The film-maker will need sufficient training—both on the subject and the methodology of the lesson learning process.

2. You need to carefully outline roles and responsibilities: i.e. it is not usually the responsibility of the film-maker to conduct semi-structured interviews or facilitate focus groups—rather, he/she will capture this process on film and edit it into a coherent whole, with the help of the person leading the lesson learning process.

3. Don't assume that making a film means that writing a document is not necessary. You have to prepare a story-board and script—and this takes time. If you rush this step your production and post-production time will increase significantly.

4. You need to carefully consider the language of your film and any translation requirements, including translation into local languages, Sign Language interpretation, captioning etc.)

5. According to your ToR, you need to decide what type of film will be most effective for your target group and what type of delivery method (through the internet, DVD, screening sessions, etc.)

6. You need to decide the length of the film: If it will be uploaded on the Internet: choose a short format (6 minutes). It is better to make several short lesson learning films on the various subjects rather than a long movie containing them all. If the film will be screened during events: you can choose a longer format, from 20 to 40 minutes. If the film will be on a DVD: you can take advantage of the DVD format to include several short sequences (presentation of the project, presentation of the context, sharing technical knowledge) as well as project documents.

7. As you write your script, don't try to carry too many ideas at once. One scene, one subject. There is a lot of information in audiovisual format: the person talking or the voice over, the graphics (titles, subtitles, logos, etc.), the cover images, the background sounds and images. Be careful: powerful images will take all the attention, so don't hesitate to show a scene without comment.

8. You must be able to summarize the knowledge to share in one simple sentence. If you cannot do that, then your point is too complex, and some of your information will be lost.
9. If possible, turn your explanation into an action: i.e. a video is more demonstrative than explanatory. Your idea should be visual and should not need an off-voice to be understood.
10. To take full advantage of the video format, a film should not contain interview scenes. However, the scenes of the film can contain an off-voice from interviews to facilitate the understanding of the scenes. In this case, make sure you vary the types of stakeholders interviewed, and bear in mind the point you want to make (be careful, too many interviews quickly become incomprehensible!).
11. If you are going to have HI staff appearing on screen, plan to have them wearing HI T-shirts, otherwise the audience cannot distinguish between staff and partners/ beneficiaries.
12. You will need to obtain written authorisation from all participants featured in the film. You may also need copyright permission for music/soundtrack.

Methodology for writing a script for a lesson learning film

Please note: The following provides only basic information. It is not a detailed technical resource for producing a lesson learning film. If you require specialist help with this, please consult the Knowledge Management Unit for signposting, or liaise directly with relevant external contacts.

Objective of the lesson learning film: The purpose of a lesson learning film is to impart knowledge to the audience. A lesson learning film does not intend to present the project as a whole; instead, it focuses on specific elements to be shared.

Identify the specific elements of the film: From your lesson learning process you have already identified the specific elements that you want to share. Often this will be a specific approach, technique, good practice or innovation.

Identify key messages: For each specific approach, technique, good practice or innovation identified, write down a single sentence that conveys the desired message to your audience.

Brainstorm images and scenes: for each sentence, brainstorm the visual images or "scenes" that would most effectively convey the desired message. To be sufficiently expressive and visual, it should be possible to understand the scene just from a title, i.e. without any sound.

Map locations, potential interviewees: for each scene, you need to map where you will film, who will take part, and the approximate duration of the scene.

Specific elements to share	Message to get across (one sentence)	Scene to be filmed	Approx duration of the scene	Location
Approach				
Technique				
Good practice				
Innovation				

Once the draft script is written, submit it to the team that will shoot and edit the film so that you can discuss and improve it together. After agreeing the scenes to film, you can produce a shooting schedule, containing all the filming days for each scene, travel time, and other logistical issues.

Handicap International has produced several films for lesson learning, including the film called "A feeling of belonging" which aims to share and build upon the experience gained from a community mental health project in Rwanda. These can be accessed on Skillweb: www.hiproweb.org.

13. Dissemination strategies

Dissemination essentially means widely distributing your lessons learned, ensuring that you reach your primary and secondary target audiences as efficiently and effectively as possible. This tool is deliberately brief and non-prescriptive. It provides project teams with a starting point for developing a context-specific dissemination strategy of their own.

Efficient dissemination, guiding principles:

- ensuring a well-organised strategy whereby all relevant programme staff are completely clear about the process as well as their roles and responsibilities;
- keeping costs low in relation to the overall budget;
- using staff expertise and time to maximum effect;
- getting publications out as fast as possible;
- choosing between electronic and paper-based publications;
- calculating an appropriate number of paper copies, in the relevant languages and formats;
- ensuring you have the contacts and financial resources to rapidly produce your publication in an accessible format if requested.

Effective dissemination, guiding principles:

- distributing your publication in a way that guarantees it will be noticed!
- making sure the primary target audience people receive your publication first;
- making sure they know what the publication is and how they can use it;
- placing your publication somewhere long-term (whether online or in a physical location) where key people are likely to notice it and can download or take it easily;
- sending your publication at a pertinent time, e.g. to correspond with an international event or situation;
- not thinking of dissemination as a one-off event but an ongoing process, whereby you constantly use new opportunities or events to promote your work.

Risks

As explained in the ToR, it is important to identify any dissemination risks. Lesson learning does not only focus on good practices and innovations. It can also highlight major failures or challenges. If the subject is particularly delicate or unsuitable for certain audiences (e.g. for some partners), you need to consider in advance how you will manage dissemination, and how this might affect the type of publication you produce.

Distribution channels

There are of course many distribution channels at both programme and international levels. You are advised to work with the relevant Technical Advisor, Operational Coordinator and Knowledge Management Unit to maximise impact.

Options include:

- **Programme level:** The email bulletins, newsletters, postal mailings, websites, list servs, technical networks which already exist at programme level.
- **International dissemination:** Contact the Knowledge Management Unit to disseminate via Handicap International's own websites (namely Skillweb and SOURCE).

It is important to work closely with the relevant Techncial Advsior who will already be actively engaged in various important international networks and can support with dissemination. Equally, the Knowledge Management Unit can help facilitate access to email addresses for colleagues working across the HI Federation.

Possible dissemination targets for lesson learning publications

Programme level	
Internal	External
Country director/ Head of mission	Project partners
Technical Unit Coordinator	Local Disabled People's Organisations or other representative civil society groups
Technical Coordinator	People with disabilities and other beneficiaries
Projects Coordinator	International and national NGOs working on this subject in-country
Project Manager + team	Relevant service providers and practitioners
Operations Coordinator	Other stakeholders for the subject concerned, e.g. schools, teachers, parent groups etc
Communications Coordinator	Relevant local authorities/ government
Knowledge Manager Coordinator	Relevant national ministries/ government authorities
Logistics coordinator	Local or national universities or academic institutions
	Local or national media (TV, radio, newspapers)
	In-country donors
	In-country agencies: UN etc

Possible dissemination targets for lesson learning publications

International level	
Internal	External
HI project teams from other programmes in the region	International networks and consortia
HI project teams around the world working on this thematic	International email listservs
Technical Advisors: DRT, DAM, DAU	UN agencies
Desks and regional programme managers	International lobbying groups
Knowledge Management Unit	International conferences
HI's International Advocacy Department	International websites and information resource centres
	International donors
	Universities and academic or research institutions

In all cases, it is necessary to (a) select and prioritise the main target audience for dissemination and (b) follow this up with specific actions for change (See Tool 14).

14. Actions for change: using your learning to influence the behaviours or practices of others

Too often, lesson learning publications find their way to a shelf in someone's office, where they remain un-read. The whole purpose of this guide is to address this problem by:

- reducing the quantity of lesson learning publications: placing a focus on lesson learning only where there is a clear added value for the wider organisation;
- improving the overall quality of lesson learning publications by promoting standardised approaches/formats;
- making sure that all lesson learning initiatives have a strong component for actively influencing the practices, behaviours or attitudes of a specific target group.

This third element is what we call "Actions for Change", i.e. using your lessons learned to make a difference to the professional practice and organisational performance of Handicap International, and also external organisations.

Your Terms of Reference have already identified the expected outcomes and primary target audience. Now you need to implement the activities to achieve this...

There is a vast range of possible Actions for Change for lesson learning projects. These are always highly context specific, and thus each project must define its own strategy.

As such, this tool provides introductory information but is deliberately non-prescriptive, given the wide range of possible options and contexts. It is neither possible nor appropriate to list every possible activity to inspire change. However, here are some important guiding principles listed.

Actions for Change at field/programme level

- Because actions for change are the most important element of the lesson learning process, you need to ensure this is well-planned, with sufficient time and resources in place.
- As much as possible, actions for change at field level should be incorporated into existing project and programme strategies. It is important to maximise existing opportunities to share and promote your publication. To do so, try to identify ongoing training, awareness-raising or advocacy activities which are relevant to the subject of you lesson learning. This may require re-packaging your publication to develop complementary training tools to meet the needs of different audiences.
- Your lesson learning publication should try to influence country-level strategic planning. Handicap International has existing mechanisms for multi-annual strategic planning (C.O.P) and it is important that key lessons learned from field experience feed into this process. For example, your lesson learned may provide important indications for future fundraising or partnership opportunities.
- Programmes should actively use lessons learned publications as an entry point for creating new partnerships or joining existing networks at field level. Your publication can be used to make contact with key actors and to establish learning alliances with other organisations interested in the same subject.

Global context/Handicap International Headquarters

- It is essential to work with the relevant Technical Advisor to develop activities to promote and share your publication. The Technical Advisor will already have established global networks and contacts through which your publication can be used as a tool for training, advocacy or awareness-raising.
- There are various internal channels through which your publication can achieve impact across the Handicap International Federation:
  • **In terms of dissemination:** your publication can be re-formatted as a Satellite Publication and promoted through Skillweb, the Source website and Source international e-bulletin.
  • **In terms of actions for change:** your publication can be used to develop training or thematic seminars at HQ, using existing exchange and appropriation mechanisms (REACT meetings, talk & breakfast meetings, video webinars, seminars etc). Your publication could also be further developed as an e-learning or technical training module; or elaborated into a more formal research initiative.

It is important to work with the Knowledge Management Unit and Technical Advisor to identify which opportunities are most appropriate.

Cambodia, 2000

Appendices

Bibliography

Relevant Handicap International Official Documents (Internal)

- **Mission, Scope of activity, Principles of intervention, Visual identity**, 2012. http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=186&cHash=0d8212c71b

- **Handicap International project monitoring and evaluation policy**, 2010. http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=243&cHash=44930ac859

- **Professional Publications Collections**, 2010. http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=632&cHash=100849b6c8

- **The writing project: from ideas to publication,** 2011. http://www.hiproweb.org/uploads/tx_hidrtdocs/PG06_TheWritingProject.pdf

- **Access to Services for people with disabilities: Practical Guide** (2010) http://www.hiproweb.org/uploads/tx_hidrtdocs/GM05_EN_04_screen.pdf

Relevant Handicap International-managed websites

- **Making it Work**–methodology for documenting good practices on disability-inclusive development and using this for advocacy: www.makingitwork-crpd.org

- **SOURCE**–international online information resources centre on disability & inclusive development: www.asksource.info

- **Skillweb**–internal hub for Sharing Knowledge, Innovation & Lessons Learned: http://www.hiproweb.org/nc/en/home/home.html

Relevant external resources

- **Admitting Failures**–a community and a resource, created to establish new levels of transparency, collaboration and innovation within civil society: http://www.admittingfailure.com

- **Knowledge Management for Development** (KM4Dev)–website promoting knowledge management for development practitioners: http://www.km4dev.org

- **Knowledge Management and Organisational Learning: an International Development Perspective;** an Annotated Bibliography, Overseas Development Institute 2003: http://www.odi.org.uk/resources/docs/170.pdf

Relevant international listservs for sharing publications

- **IDA CRPD Forum**–International Disability Alliance forum allows non IDA members to be informed about IDA activities, as well as to provide information on their own activities or request information on CRPD related matters: http://www.internationaldisabilityalliance.org/en/ida-crpd-forum-listserve

- **The Global Partnership for Disability and Development** (GPDD)–a mailing list which facilitates interaction between stakeholders to advance the social, economic, and civic empowerment of people with disabilities, and the mainstreaming of disability issues in development: http://www.gpdd-online.org/mailing-list

- **Disability JISCmail**–a disability-research discussion listserv: https://www.jiscmail.ac.uk/cgi-bin/webadmin?A0=disability-research

Recent examples of Handicap International lesson learning initiatives

Please note: these are lesson learning initiatives which were produced before this guide had been published:

- **Strengthening communities to integrate persons with disabilities in the HIV & AIDS response in Rwanda**, 2013. http://www.hiproweb.org/uploads/tx_hidrtdocs/HILessons_Learned_Collection_Strengthening_communities_to_integrate_persons_with_disabilities.pdf
- **A feeling of belonging: An example of a community mental health project in Rwanda**, 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=783&cHash=d68db19948
- **Access to water, hygiene and sanitation for persons with disabilities in the locality of Mandiakuy** (Tominian Circle in Mali), 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=741&cHash=82c1770b7e
- **Fighting against epilepsy in Rwanda: An efficient patient-centred experience**, 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=631&cHash=84938a7c20
- **Fostering and managing change in Algerian Nurseries**, 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=683&cHash=cab31fe789
- **Everybody's Business: Sharing Responsibility in the Response to HIV and Gender-Based Violence in the 2007–2008 Kenya Post-Election Violence**, 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=624&cHash=24c4b1372d
- **Access to drinking water for people with disabilities in the town of Tenkodogo** (Burkina Faso), 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=709&cHash=b8c5415544
- **Experiences from Handicap International's HIV and Disability Project in Cambodia**. Part 1, 2012: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=668&cHash=71fe3b4195
- **Schooling for deaf children in mainstream schools in Burkina Faso**, 2011: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=457&cHash=8ce6a5bfe5
- **Information Road Safety**, 2011: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=452&cHash=871cfcee06
- **Persons with Disabilities and Sexual Violence Prevention and Response**, 2011: http://www.hiproweb.org/en/annexes/document-search/docs/liste.html?tx_hidrtdocs_pi1%5BuidDoc%5D=576&cHash=1409460805

Footnotes

1. Pierre de Zutter. *Des histoires, des savoirs et des hommes : l'expérience est un capital*, Paris, Charles Léopold Mayer, 1994.

2. If the primary motivation for lesson learning is to capture good practices in order to carry out advocacy to influence the behaviour, relationships or activities of external actors/ organisations–it is perhaps more relevant to refer to Handicap International's Making it Work methodology: www.makingitwork-crpd.org

3. At a basic level, the KM Unit Capitalisation staff can provide a one-off meeting (in person or at distance) to support initial planning, to define roles & responsibilities, and to signpost as required.

4. It is possible to make a compilation publication of good practices, innovations and failures.

5. A detailed lesson learned review can also incorporate a Learning Paper, or good practice/innovation/failure case studies.

6. Various INGOs are engaged in capturing, sharing and learning from their failures. For example, please see the "admitting failure" initiative: http://www.admittingfailure.com

7. A lot of the information in this tool has been adapted from the Making it Work Guideline: www.makingitwork-crpd.org

8. The process presented here has been adapted from the Making it Work methodology: www.makingitwork-crpd.org

9. Example: http://www.admittingfailure.com –a global movement aiming to establish new levels of transparency, collaboration and innovation within civil society.

10. Please note: sharing failures is an extremely valuable exercise. But it is important to facilitate this process well, so that everybody in the seminar or working group (not only those presenting case studies) is open to sharing and discussing constructively the problems and mistakes from their projects.

11. Please note: if you are planning to develop a website, please consult with the Knowledge Management Unit to ensure coherency with other HI websites and to discuss future sustainability of the site.

12. http://www.hiproweb.org/uploads/tx_hidrtdocs/PG06_TheWritingProject.pdf

13. Example taken from the Handicap International project: Disability-inclusive Public Health Services, Gujarat, India–but heavily adapted for the purposes of this guide.

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Learning lessons from experience

This practical guide on learning lessons from experience is for all Handicap International staff (individuals and teams) who intend to conduct or support lesson learning from a project or programme experience.

The guide is organised into three main sections.

Principles and Benchmarks: this section provides important definitions and a framework for understanding how lesson learning occurs within Handicap International programmes.

Planning: this section offers practical advice for planning a lesson learning process. It explains how to formulate clear Terms of Reference; how to select a methodology; and how to prepare a detailed Action Plan.

Implementation tools: this section offers practical tools to help implement an effective lesson learning process, including: how to capture, formalise and publish lessons learned; how to disseminate your publication: and how to influence change.

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