



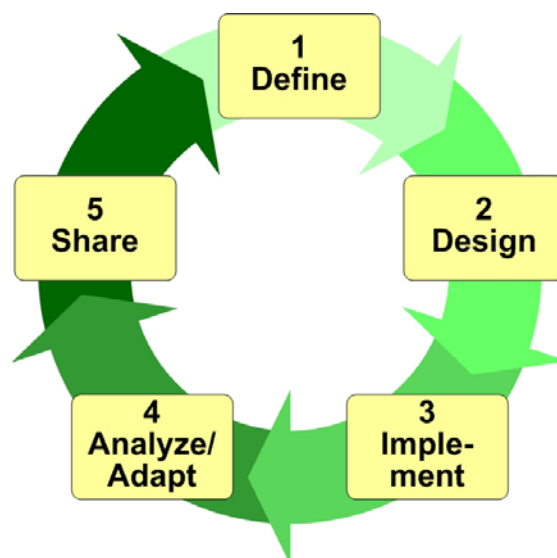
for a living planet[®]



Resources for Implementing the WWF Project & Programme Standards

Step 5.1 Sharing Lessons and Good Practices

March 2007



Step 5.1 Sharing Lessons and Good Practices

Contents

What Is Sharing Lessons and Good Practices?	1
Why Sharing Lessons and Good Practices Is Important	1
When to Share Lessons and Good Practices	2
How to Share Lessons and Good Practices	2
A) Consider What You Want to Share.....	2
B) Consider Who Is Your Audience.....	3
C) Consider How You Should Reach Your Audience	3
Sharing Is a Two-Way Process	6
References	7
Annex 1 – Methodologies for Sharing Lessons and Good Practices	8

This document is intended as a guidance resource to support the implementation of the *WWF Standards of Conservation Project and Programme Management*. Although each step in these *Standards* must be completed, the level of detail depends on the circumstances of individual projects and programmes. Accordingly, each team will have to decide whether and to what level of detail they want to apply the guidance in this document.

This document may change over time; the most recent version can be accessed at:
<https://intranet.panda.org/documents/folder.cfm?uFolderID=60989>

Written by: Debbie Heaney, WWF-UK. **Edited by:** Foundations of Success

Please address any comments to Sheila O'Connor (soconnor@wwfint.org).

Sharing Lessons and Good Practices

What Is Sharing Lessons and Good Practices?

When we think about conservation communication, we can imagine at least a few different dimensions:

- Communication about project performance and achievements versus communications as a conservation strategy (e.g., an environmental awareness raising campaign);
- Informal communication (e.g., face-to-face conversations, e-mails, and internal documents) versus formal communication (e.g., professionally-produced brochures, videos, and websites)
- Internal communication (primarily communication among project team members and partners, between programmes and within the WWF Network) versus external communication (primarily people outside the project team and partners – e.g., other conservation organizations, government, donors, the general public)
- A collaborative, two-way process versus informing others

Step 5 (Share) of the Standards is about sharing lessons and good practices in order to adapt and improve conservation projects and programmes. It is not about communications as a conservation strategy (see the first dimension above). Here, we discuss Step 5.1, which focuses on the *informal* and *internal* sharing of lessons and good practices related to project achievements and challenges, and engagement by both sides in the sharing process. Step 5.2, in contrast, focuses primarily on the *formal* and *external* sharing of lessons and good practices related to project achievements and challenges. Often, however, the line between these two types of communications can be somewhat blurry. For example a formal product can be used with both internal and external audiences; a lesson can be shared internally using one method and externally using a different mechanism. We suggest you do not worry too much about this blurry line and instead focus on sharing and communicating lessons in the way that makes the most sense for your audience and your circumstances. See [Guidelines on Step 5.2](#) for more details on formal communication plans and products.

It can sometimes be difficult to separate the sharing of lessons and good practices from the process of learning which is covered in more detail in guideline [0.2 Embracing Learning](#); the two-way nature of sharing often means that further learning takes place within the act of sharing.

Why Sharing Lessons and Good Practices Is Important

Projects can take years or even decades to demonstrate their impact. In many ways, conservation can be seen as a perpetual process. In almost all cases, conservation projects will continue beyond the involvement of any one person. As a result, it is critical that the work you do and the knowledge you gain be captured and shared in some form of institutional knowledge.

One of the benefits of being part of a Network is the opportunity it affords to increase WWF's impact through sharing good practices and learning. Sharing your individual and project team knowledge of good practices can lead to the magnification of conservation impact at a global level. Sharing lessons

and good practices can also contribute to the work of communications and fundraising teams by generating stories that can then be tailored for formal communications products.

When to Share Lessons and Good Practices

In short, you share lessons and good practices when you have identified lessons that would be of value to someone else. Lessons can be shared at any time and should be shared on an ongoing basis. Most project teams will find that in the early stages of implementation, lessons will be more related to the conservation process than to achieving conservation impact. Through an adaptive management approach, the team should be reflecting on what is happening within their project, monitoring and analyzing changes, and adapting based on the lessons that arise. Over time, the team will ideally be able to then identify lessons related to conservation impact – what works, what does not work, and why..

Learning is becoming more institutionalised within WWF; therefore more opportunities now exist for sharing lessons. Teams should seek to capitalise on these for sharing the lessons and good practices from their own projects.

How to Share Lessons and Good Practices

There are three key elements to sharing lessons and good practices:

- a) Consider what you want to share (what lessons you want them to consider or engage with)
- b) Consider who is your audience
- c) Consider how you should reach your audience (this includes determining how you will present your learning in a way that will engage your audience)

A) Consider What You Want to Share

When considering sharing lessons and good practices, it is important to focus on the quality and relevance of what is communicated rather than simply increasing its quantity and availability. With the availability of information and communication technology today, there is an increasing assumption that sharing lessons simply requires communication of information. The danger is that the illusion of “more is better” encourages greater and greater emphasis on moving information around, and less on identifying and exchanging knowledge.

Therefore, you should give serious consideration to what lessons and good practices you have from your project that would be relevant and beneficial to your audience. This will involve referring back to the analysis that you did and the conclusions you reached in Step 4.2 ([Analyze Project Results and Assumptions](#)) and to the decisions you made in Step 4.4 ([Adapt Your Plans and Budgets](#)).

A small number of detailed, validated, thought-provoking lessons are much more valuable than a long list of bullet points.

B) Consider Who Is Your Audience

Think about who your audience is and what is their interest in the lessons and good practices from your project (see guideline [0.2 Embracing Learning](#) for further details).. You will have identified some of your audiences when you were formulating your key learning questions in Step 2 of the WWF Standards. Knowing who you want to target will help you determine what method you will use to share your lessons.

Lessons and good practices should be shared at a number of levels:

- Within a project team – this should be happening as a matter of course and contributes to the [performance and learning culture](#) covered in Step 5.4
- With partners
- Between projects locally (this is often the level at which lessons will have the greatest relevance – to other projects working within the same context)
- Between projects across the WWF Network (particularly relevant from a thematic perspective)
- With the wider conservation/environment community

Some of these audiences (especially the last two) are really external audiences that could also learn about the lessons through more formal communications products developed in [Step 5.2](#).

C) Consider How You Should Reach Your Audience

Annex 1 highlights a number of methods for the informal and generally internal sharing of lessons and good practices in Step 5.1. You should review this annex when thinking about what might be the most effective way to reach your audience. As discussed, you should also keep in mind who your audience is and what message you want them to receive.

Sharing Lessons in Writing

To be ready to share lessons and good practices with others, your team should be documenting on a continual basis all key lessons, conclusions and recommended actions. This will provide a record over the years of the project of what you found worked and did not work. This will assist your current project team over the long term. More importantly, if current project staff leave, this will ensure that there is a record for new project staff of what was done and what was learned as a result (thus contributing to an organisational memory). These documents will also provide a useful contribution to Technical Progress Reports. Key lessons and recommendations can be shared with a wider audience.

A well documented lesson is one that includes the following:

- Brief description of the issue/activity/approach.
- What were the challenges?
- What was done?
- What was learned?
- What worked or did not work? Why?
- What could have been done differently? How?

Sometimes having a clear set of questions that you are trying to answer can help to structure your documented lessons (these should be the key learning questions that you identified during the Design Step – see [0.2 Embracing Learning](#) for further details).

Good practices in documenting lessons learned are to produce lessons that are:

- **Specific** – clear, crisp and precise, not woolly or vague
- **Actionable** – something that can be done – not a vague principle
- **Instructive** – provide recommendations for use in the future by individuals or teams

Below are some examples of documented lessons that display these three elements:

**Box 1. A Lesson from a programme with a social change element
(adapted from a real example in a Technical Progress Report)**

Context: This programme includes a component focusing on empowering and building the capacity of individuals and groups to sustainably manage and conserve their environment and livelihoods, and to influence decision-making processes. Much of this is done through the strengthening of local-level organisations.

Lesson: It is important to ensure the existence of reading, writing, and basic math skills for partner organisations, teachers, and leaders who are linked directly to the administrative and operational aspects of local-level organisations that are engaging in influencing decision-making processes. Where they are lacking, efforts need to be made to develop these skills. It is recognised that this does not fall within WWF's niche, but partnerships with organisations that support literacy initiatives should be considered.

Why: A key criterion for the success of the programme is the sustainability of local-level organisations that are empowered to engage in debate and influence decision-making. Where reading and writing skills are weak, it reduces the organisation's ability to engage in debate – staff often feel less confident to engage in debate with others who have more education. Moreover it will not be possible for organisations to operate effectively, and without external support, if they do not have the capacity to carry out basic administration and financial tasks.

Observations: *This lesson provides the reader with some context, the actual lesson (recommendation) and a brief explanation of why the lesson is important. This lesson would be relevant for higher-level decision-makers, project managers and teams, and project partners.*

Box 2. A Lesson from the Good Woods Project Lessons Learned Report, October 2005: Certification in a Small-Scale Producer Context

Context: Achieving FSC certification is a complex and costly process, especially for small producers. Nevertheless, there can be significant indirect benefits. For example, we found in Kenya that:

- a) Improved business practice and quality assurance of products increased competitiveness of the carving co-operatives (feedback from carvers also indicated that FSC documentation requirements allow them to track their costs better).
- b) The FSC required group formation of farmers has resulted in the creation of a new village forum where village men and women of all ages can exchange views and discuss joint initiatives other than neem farming. This was previously not possible.

In Kenya, we found we were able to successfully lobby FSC to improve access to small producers and unusual certification cases because:

- a) We had a perfect practical example to demonstrate the barriers faced;
- b) There was already a critical mass demanding change in the FSC system;
- c) We had the organisational clout of WWF and experienced people to take the case to FSC; and
- d) We could potentially achieve wider benefit for conservation and livelihood if a general relaxation of conditions for access to FSC were achieved (e.g. new SLIMF system means some improvement)

Lesson: FSC certification can offer many benefits to small producers, but it is important to assess carefully whether FSC certification is the best strategy to achieve your project goals and objectives. If your project does use this strategy, it may be necessary to lobby FSC to improve access for small producers. Your lobbying efforts are likely to be more successful if you are working under conditions like those listed above.

Why: Achieving FSC certification is a complex and costly process that should not be taken lightly. There may be other strategies out there that could be more effective for your context. If you do embark on FSC certification for small-scale producers, it is important to ensure that the conditions listed above are put in place.

Observations: *This lesson is very specific setting out what needs to be considered by others thinking of undertaking a similar approach. It is therefore targeting project managers who may be interested in and/or considering incorporating certification into their project.*

Sharing Lessons Face-to-Face

When presenting lessons and good practices face-to-face – whether in informal discussions or in more formal presentations – the elements of *specific*, *actionable*, and *instructive* still apply. It is very easy with presentations and discussions to focus on description, or to bury your valuable lessons in a mountain of detail and anecdotes.

Applying the core principles below will help you in preparing and sharing lessons face-to-face.

- Keep ‘learning’ in mind as you prepare your presentation- this will help you to ensure that what you share is targeted towards sharing lessons and not just an overview of your project.
- Bear in mind how your audience can take in and analyse the information that you give them for themselves and their own context
- Present sufficient context for your audience to understand your lessons. This can assist them to analyse what your lessons mean within their own contexts.
- Do not overload your audience with information – focus on one or two key lessons.

- Present your analysis as well as the resulting lessons
- Use examples and stories to bring your lessons to life and inspire and spark your audience's imagination (However, beware of reducing the impact of your lessons by deflecting your audience's attention elsewhere).
- Allow plenty of time for questions – these help people to clarify and learn for themselves.

Obviously these principles are easier to apply to formal approaches when you have time to prepare, but keeping these principles in mind when sharing learning less formally will help you to share more effectively in these situations.

Sharing Is a Two-Way Process

In addition to the three key elements to sharing lessons and good practices discussed above (who is your audience; what you want to share; and how you should reach your audience), it is important to keep in mind that sharing should not be one-way. Project teams should seek to learn from others as well as share what they have learned. To facilitate this:

- Think about what you want to learn – what are the key questions you are seeking to answer?
- In discussions seek to learn from others – do not just focus on disseminating your own lessons. Be open to being questioned and challenged, as this provides an opportunity to analyse what you have learned in more depth or from a new angle, which can provide new insights.
- Make time to read the lessons that are being shared by other projects and consider how they might inform your own project.

You may find that engaging in a two-way process becomes as much a learning process as it is a sharing process.

References

- Britton, Bruce. 2002. [*Learning for Change: Principles and Practices of Learning Organisations*](#). Sundbyberg: Swedish Mission Council
- Britton, Bruce. 2005. [*Organisational Learning in NGOs: Creating the Motive, Means and Opportunity*](#). Oxford: INTRAC
- Bucheli, B and Romo, G. 2005. [*Communities of Practice: Lessons from Latin America*](#). Oxford: INTRAC
- Davies, R and Dart, J. 2005. [*The Most Significant Change Technique: A Guide to Its Use*](#).
- Heaney, D. 2004. [*Sharing Knowledge Tool*](#) (part of the Learning Toolbox). WWF.
- Heaney, D. 2004 . [*A Guide to Running Lesson Learning Workshops*](#). WWF
- Margoluis, R and Salafsky, N. 1998. *Measures of Success: Designing, Managing, and Monitoring Conservation and Development Projects*. Washington DC: Island Press pp.206-219.
- Paulsen, D. 2004. [*Jazzing up the Ancient Art of Conversation*](#). Cape Town: CDRA
- Reeler, D. 2004. [*Story-telling – Getting to the Heart of Things*](#). Cape Town: CDRA
- Wenger, E. 2004(?). [*Communities of Practice: A Brief Introduction*](#).

Annex 1 – Methodologies for Sharing Lessons and Good Practices

Below are a number of methods that can be used to share lessons and good practices. Do not rely on one approach, but select a range that will reach your target audiences with the message you wish them to receive. Also, keep in mind that the methods described are not necessarily mutually-exclusive. For example, you may hold a workshop for sharing lessons, and that workshop could present opportunities for sharing lessons through casual conversation and presentations.

	Method	Notes	Benefits	Challenges
Face-to-face	Workshops	Workshops can be designed to facilitate the sharing of lessons amongst participants - for example through sharing a range of experiences on a common issue, which can lead to new learning for individuals. Lesson learning may be the focus of the workshop or may just be one component within a workshop. [Links with entry below on workshop reports]	<ul style="list-style-type: none"> • Highly interactive • Allows for discussion and deepens understanding • Opportunity for two-way learning 	<ul style="list-style-type: none"> • Learning will be shared with a limited audience • May require a facilitator
	Presentations	Presentations involve speaking directly to your audience. When sharing learning in this way it is important to present your analysis rather than just description; be specific and use examples. Allow for questions – if you are looking to share your learning, questions from the audience will help them to digest the lessons and consider how they might be applicable within their own context.	<ul style="list-style-type: none"> • Direct access to audience • Allows for some interaction 	<ul style="list-style-type: none"> • Learning will be shared with a limited audience • There is always a risk of the audience passively listening without processing the lessons for themselves • Limited opportunity for interaction
	Casual contacts	There is a school of thought that says that the most valuable part of workshops and conferences are the discussions that take place over coffee and in the bar in the evenings. Whilst this may overstate the case, it is indeed true that these informal contacts can lead to fruitful learning experiences and future collaboration.	<ul style="list-style-type: none"> • Low cost • Interactive • Opportunity for two-way learning 	<ul style="list-style-type: none"> • Very “hit and miss” – dependent on who you get to talk to • For any learning to be effective, depends on individuals taking the initiative to follow-up • Not good for sharing in-depth

	Method	Notes	Benefits	Challenges
		Telephone calls and casual chats at the coffee machine/in the corridor can have a similar impact.		content
Face-to-face	Team/office/ stakeholder meetings	Sharing lessons learned can be put on the agenda for regular meetings. This ensures that lessons are shared on an ongoing basis in an interactive forum.	<ul style="list-style-type: none"> • Time efficient as built into existing meeting cycles • Allows lessons to be shared with those closest to the project • If well integrated, can link directly into project decision-making processes 	<ul style="list-style-type: none"> • Amount of time spent on sharing lessons and good practices may be limited • Without a strong learning culture, the agenda item can often get squeezed or dropped
	Exchange visits	Exchange visits provide a way of sharing technical and managerial expertise between sites, projects or organisations. The use of agreed learning objectives and a programme of focused activities enables individuals to maximise the learning benefits of spending time at a different site, project or organisation. Exchanges may last from a few days to a number of months. Exchanges might be reciprocal or form part of a wider interchange programme.	<ul style="list-style-type: none"> • Interactive • Affords plenty of opportunity for discussion and deepening of understanding • Two-way learning • Opportunity for exchangee to really understand processes and approaches • Being “on-the ground” and seeing what is happening can engender a more inspiring learning experience 	<ul style="list-style-type: none"> • Can involve significant amounts of time • Can be costly - particularly travel and accommodation • Requires someone to manage the overall process
Written	Technical reports	<p>Technical reports are a useful mechanism for feeding lessons back to funders/donors – particularly where they inform a need for your project to be adapted. The lessons should stem from analysis of project data.</p> <p>Lessons may relate to technical or management areas of your project.</p>	<ul style="list-style-type: none"> • Six-monthly – therefore a simple way to keep your funder/donor audience regularly updated. • Links to decision-making mechanisms 	<ul style="list-style-type: none"> • Identifying valuable lessons at the early stage of a project can be challenging

	Method	Notes	Benefits	Challenges
	Workshop reports	Where learning has taken place within a workshop the lessons should be written up in the report. For ease of use for the reader, it is good practice to collate the lessons in one section.	<ul style="list-style-type: none"> • Can be disseminated to a wide range of audiences 	<ul style="list-style-type: none"> • Must be clear before writing up the report as to who is the intended audience. Often workshop reports are only useful to and/or read by the workshop participants, which will limit the range of audiences. • Reports are often lengthy and weighty – it can be easy for the lessons to get lost if not clearly signposted within the document.
	Internal policy documents, guidelines and manuals	There is a valid argument that some lessons you have to learn for yourself – simply being told about them by others is not enough. However a point in time comes when, as an organisation, we can say categorically that one approach consistently works better than any other. At this point, this should be enshrined as WWF’s approach and documented in internal policies, guidelines and manuals.	<ul style="list-style-type: none"> • Ensure that lessons learned become institutionalised 	<ul style="list-style-type: none"> • These decisions often fall outside the remit of project teams.
	Case studies	Case studies form a popular way of sharing lessons and good practices. Case studies have the flexibility of focusing on a single site or issue, or on sharing lessons from a range of sites on a common theme. They can be stand alone documents or form “evidence” within a longer report. (Can overlap with formal communication products)	<ul style="list-style-type: none"> • Can be tailored for a wide range of audiences • Can be used for a variety of purposes (e.g. sharing lessons, informing or lobbying) • Provide the opportunity to include specific examples • Often visually attractive with the inclusion of diagrams, photos and personal stories that 	<ul style="list-style-type: none"> • Can over-emphasise one approach or success

	Method	Notes	Benefits	Challenges
			bring the work to life	
Electronic	Communities of Practice (CoP)	CoPs bring together people working on a key technical area to share their experiences and lessons and to work collaboratively to develop solutions and best practice. They are usually informal.	<ul style="list-style-type: none"> • Those to whom the lessons would be most useful are likely to be a part of the CoP • Low cost • Enable two-way learning • Can identify innovative ways forward 	<ul style="list-style-type: none"> • Sharing tends to be limited to those who are part of the CoP • Can be difficult to sustain over time • CoPs are often web or e-mail based, and therefore can exclude anyone with poor Internet access
	Postings on intranets (e.g. Connect)	<p>A low cost way of sharing lessons with designated audiences. Some intranets focus on a specific theme and are regularly accessed by experts in that area to share documents. Often, there is a specific section for lessons and good practices. Robust search functions also facilitate identifying documents on lessons learned and good practices.</p> <p>WWF Connect is accessible to the whole WWF Network and is structured around our key areas of work, and contains an area called the K-Zone for sharing lessons and good practices.</p>	<ul style="list-style-type: none"> • Low cost • Quick • Instant access to WWF audiences 	<ul style="list-style-type: none"> • Lessons can get lost in a morass of information • Dependent on good Internet access for both those posting lessons and those accessing them • Dependent on individuals being proactive and going out to find lessons from others
	E-mail groups	E-mail groups can be created for as large or small a group as needed, and last until they are no longer useful. They can operate in a similar way to CoPs (see above).	<ul style="list-style-type: none"> • Can target the audience you want to reach • Low cost • Enable interaction and two-way learning 	<ul style="list-style-type: none"> • Information overload can mean that people do not find the time to read and reflect on the information that they receive • Often dominated by a few people who enjoy using computers as a means of communication

	Method	Notes	Benefits	Challenges
Electronic	E-conferences	E-conferences are usually conducted via e-mail or Internet on a single topic, and are of fixed duration. They provide an opportunity for participants to share their experiences and lessons, and are written up into a report at the end. These can bring together experiences and lessons from a wide range of organisations.	<ul style="list-style-type: none"> • Low cost • Focused on one issue • Can identify innovative ways forward 	<ul style="list-style-type: none"> • Require good moderation/facilitation • Dependent on good e-mail/web access • Can be seen as a burden on top of existing heavy workloads
	Video	Video allows you to visually capture key details of your project. (Can overlap with formal communication products)	<ul style="list-style-type: none"> • Visual • Allow people to share their experiences in their own words • Can be a useful mechanism for sharing lessons with a view to influencing others. • Useful with audiences where literacy may be an issue 	<ul style="list-style-type: none"> • Can be costly • Requires specific technology • If done badly can do more harm than good • Risk being descriptive rather than analytical
Creative	Story telling	Story telling is another way of sharing what you have learned. Story telling tends to use less technical language, and can therefore be useful for reaching non-conservation and non-NGO audiences (The Most Significant Change Technique uses the generation of stories as a way of monitoring change – see Davies and Dart (2005))	<ul style="list-style-type: none"> • Creative – can capture people’s imagination • Feeds into communication and fundraising teams needs • Useful with audiences where literacy may be an issue 	<ul style="list-style-type: none"> • Not suitable for some audiences

This is by no means an exhaustive list. If you use other approaches that are effective, please let us know.