



USAID
FROM THE AMERICAN PEOPLE

USAID Advancing Nutrition Collaborating, Learning, and Adapting Compendium

Approaches, Lessons Learned, and Resources



About USAID Advancing Nutrition

USAID Advancing Nutrition is the Agency's flagship multi-sectoral nutrition project, led by JSI Research & Training Institute, Inc. (JSI), and a diverse group of experienced partners. Launched in September 2018, USAID Advancing Nutrition implements nutrition interventions across sectors and disciplines for USAID and its partners. The project's multi-sectoral approach draws together global nutrition experience to design, implement, and evaluate programs that address the root causes of malnutrition. Committed to using a systems approach, USAID Advancing Nutrition strives to sustain positive outcomes by building local capacity, supporting behavior change, and strengthening the enabling environment to save lives, improve health, build resilience, increase economic productivity, and advance development.

Disclaimer

This report is made possible by the generous support of the American people through the U.S. Agency for International Development. It was prepared under the terms of contract 7200AA18C00070 awarded to JSI Research & Training Institute, Inc. (JSI). The contents are the responsibility of JSI, and do not necessarily reflect the views of USAID or the U.S. Government.

Recommended Citation

USAID Advancing Nutrition. 2023. *USAID Advancing Nutrition CLA Compendium Approaches, Lessons Learned, and Resources*. Arlington, VA: USAID Advancing Nutrition.

Photo Credit: Thais Bessa/ILRG

USAID Advancing Nutrition

JSI Research & Training Institute, Inc.

2733 Crystal Drive

4th Floor

Arlington, VA 22202

Phone: 703-528-7474

Email: info@advancingnutrition.org

Web: advancingnutrition.org

Contents

- Acronyms..... iv
- Introduction 1
- CLA Approach 1
 - Project-Wide Enabling Conditions 2
 - CLA in Country Programs 5
 - Learning Agendas and Activities..... 7
- Lessons Learned..... 9
- Annex 1. Resources and Templates 11
 - Learning 101 12
 - Learning Highlight—*Template*..... 19
 - Learning Highlight Interview Guide—*Template* 20
 - Learning Planning Process 22
 - Learning Plan/Agenda/Concept Note—*Template*..... 24
 - Country PY5 Learning Priorities—*Template* 28
 - CLA Considerations for PY5 Work Planning 30
 - CLA Country Close Out Package..... 33
 - Internal Guidance: Identifying Key Messages in Preparation for Dissemination..... 33
 - USAID Advancing Nutrition: Country Programs Presentation on Identifying Lessons Learned and Using Data for Storytelling 38
 - USAID Advancing Nutrition: Country Close-Out Pause and Reflect Planning Process and Sample Agenda 39
 - USAID Advancing Nutrition: Country Close Out Key Messages Template 43
- Annex 2. USAID Advancing Nutrition’s Collaborating, Learning, and Adapting Plan 47

Acronyms

BHA	Bureau for Humanitarian Assistance
CeCA	Center for Children in Adversity
CLA	collaborating, learning, and adapting
EDI	equity, diversity, and inclusion
GH	Bureau for Global Health
KM	knowledge management
LOE	level of effort
M&E	monitoring and evaluation
MEL	monitoring, evaluation, and learning
RFS	Bureau for Resilience and Food Security
PY	project year
TBD	to be determined
USAID	U.S. Agency for International Development
WSHG	women's self-help group

Introduction

This compendium documents the collaborating, learning, and adapting (CLA) approaches implemented by USAID Advancing Nutrition. It also compiles internal resources and templates that we developed to support CLA implementation across the project (annex 1) and the project's CLA plan (annex 2). The aim of this compendium is to share a practical example of how a global USAID project with core funding and 12 Mission buy-ins applied CLA from 2018–2023, generating lessons learned to improve implementation during the project period and to inform future nutrition projects. Other USAID investments can adapt and apply the approaches described, and resources and templates provided.

CLA Approach

Our application of CLA has shifted over the five-year project period, as the needs of the project have changed. In the first year, the project created a CLA plan to help address two key challenges:

1. **Collaborating with a diverse set of partners and external stakeholders:** Our project's eight technical teams¹ developed annual work plans funded by multiple bureaus and Missions. Teams led those activities and also supported other teams' activities and Mission buy-ins. To respond to USAID bureau and Mission priorities, teams needed to collaborate effectively, with regularly scheduled time for reflection to determine needed adaptations.
2. **Implementing a wide range of activities, reflecting the breadth of USAID's *Multi-Sectoral Nutrition Strategy* and the needs of diverse stakeholders:** Critical gaps in the nutrition evidence base and implementation challenges facing multi-sectoral nutrition require continual learning and translation of evidence into action in a manner accessible to all stakeholders.

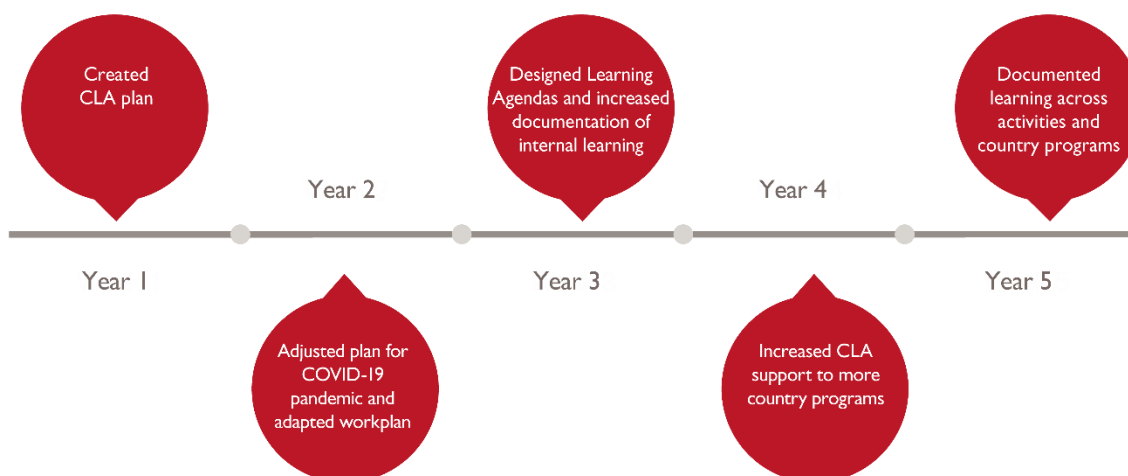
In the project's second year, the COVID-19 pandemic prompted us to quickly reassess and adapt our programming in response to global uncertainty. Because CLA provides a framework for learning and adaptive management, we built on our existing CLA plan to help us respond to the new way of working required by the pandemic. We amended much of our work plan to provide virtual support with country buy-in scoping and start-up, technical assistance of activity implementation, baseline household surveys, and nutrition training and counseling.

In the project's third year, we continued monitoring and adapting to the COVID-19 pandemic, began designing and implementing learning agendas and activities (figure 1), and started placing a greater emphasis on internal learning and adaptation as our activity implementation ramped up. In the project's fourth and fifth years, the number of Mission buy-ins increased significantly, so we developed tools specifically for country programs and adapted how we supported CLA with them. In the fifth year of the project, as the country programs prepared for close-out, we also developed guidance and templates to support identification of key successes, lessons learned, and recommendations for future programs.

Below we describe the project-wide CLA approach we used, how we supported CLA in the country programs, and how the project used learning agendas and activities.

¹ These teams are: Capacity Strengthening; Early Childhood Development; Food Systems; Knowledge Management; Monitoring, Evaluation, and Learning; Nutrition and Health Systems; Nutrition in Humanitarian Contexts; and Social and Behavior Change and Gender.

Figure I. A Timeline of CLA on USAID Advancing Nutrition



Project-Wide Enabling Conditions

As outlined in the USAID CLA framework² (figure 2), successfully implementing CLA requires a supportive enabling environment. USAID Advancing Nutrition allocated resources to support CLA, fostered a culture of CLA, and developed and instituted processes to facilitate CLA. These conditions set the stage to enable staff across the project to implement CLA.

Resources

While successful CLA requires engagement from staff across the project, it was vital to have **staff** with CLA skills and dedicated time to support CLA. We appointed a full-time learning and research advisor, who dedicated around half of her time to CLA. A project officer used about a quarter of her time to provide additional CLA support. CLA responsibilities were included in the job descriptions of some MEL country advisors as well. The Monitoring, Evaluation, and Learning (MEL) director provided oversight and technical input to CLA plans and implementation. We developed common resources and processes for use by the project, provide internal training on CLA; helped implement learning agendas and activities; provided on-demand technical assistance and coaching; reviewed and provided feedback on CLA-related documents (e.g., pause and reflect agendas, data collection guides, learning briefs); and collected CLA data and information for reporting. We also provided CLA support to other USAID implementing partners through a technical assistance mechanism funded by the Bureau for Humanitarian Assistance. These staff also coordinated with the Knowledge Management (KM) team to document learning and generate learning for communication products given the complementarity of their efforts.

As a contract mechanism, USAID Advancing Nutrition needed to cover staff time with a specific deliverable. We worked with our USAID counterparts to develop a **CLA-focused deliverable** in each annual work plan that funded project-wide CLA support, which was critical to ensuring the success of CLA. Topic-focused CLA learning agendas and activities received additional funding through other core-funded deliverables or Mission buy-ins.

² USAID Learning Lab. n.d. "Collaborating, Learning, and Adapting Framework & Key Concepts." Accessed July 22, 2023. https://usaidlearninglab.org/sites/default/files/resource/files/keyconcepts_twopager_8.5x11_v7_20160907.pdf.

Culture

As staff transition and activities evolve, building a culture of CLA was an ongoing process. We invested more heavily in raising awareness about CLA early in the project, and focused on strengthening CLA skills mid-project, before shifting to more facilitation and coaching in the last year of the project. Project leadership, including the project director and MEL director, were **champions** of CLA throughout by encouraging learning, supporting reflection and adaptation, promoting the investment of staff time in CLA, and facilitating the application of learning across project teams and country offices.

We developed a CLA Plan in the first year of the project, and it guided our efforts to implement CLA and support adaptive management of our operational and technical components. In the first two years, we developed staff **awareness** by engaging staff across teams to develop the CLA Plan, hosting project-wide events to raise awareness of CLA, and joining team meetings to discuss CLA and what it means in the context of our project. We made use of existing USAID and other CLA materials and resources from the USAID Learning Lab when developing the CLA plan and sensitizing staff about CLA. We also incorporated CLA into the new staff MEL orientation received by new US-based staff and country-based MEL staff to acclimate them, as the project more than doubled its US-based staff between years 1 and 4.

Quarterly project **pause and reflect** sessions were a key mechanism for building a culture of CLA. We used them to sensitize the project about CLA, share resources and templates, reflect on and identify priorities to improve project and team functioning in the next quarter, build meaningful working relationships, and improve collaboration across the project's eight technical teams. Particularly while working virtually, it has provided a space to reflect, share, and strengthen community.

We also created a CLA-themed channel on Slack to regularly share reminders, updates, and resources with US-based project staff.

Processes

The project used several key processes to implement CLA—pause and reflects, a CLA indicator in its Results Framework, and creating and sharing learning highlights. We encouraged teams to use other processes like after-action reviews, which activity managers used on an as-needed basis.

Our quarterly **pause and reflects** engaged staff in thinking about CLA. This routine process provided an opportunity to strengthen and reinforce culture and skills around each of the three components of CLA—collaborating, learning, and adapting. In each pause and reflect, we focused on different relevant operational (e.g., collaboration approaches; equity, diversity, and inclusion [EDI]) or technical topics

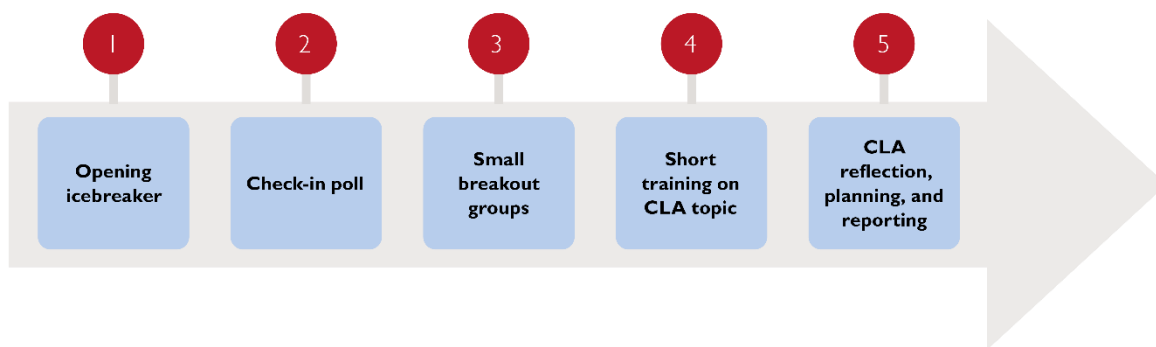
Figure 2. USAID CLA Framework



Source: USAID Learning Lab n.d.

(e.g., women’s diets, gender). To determine the themes, we consulted with leadership and staff and considered upcoming project needs and events. The sessions typically began with an opening icebreaker to reinforce collaboration and community on the project. Then we had a check-in poll to get a pulse check on staff morale and activity implementation and identify challenges and opportunities for the next quarter to improve project operations and implementation. We often used breakout groups to delve deeper into reflection questions or conduct an activity like developing learning questions or action planning. It was useful for teams to engage in CLA reflection and planning during the pause and reflect so they did not have to find time to set aside independently. In some sessions, we provided short training sessions on CLA topics to strengthen staff skills and disseminate resources and templates we developed. The CLA staff on the MEL team typically planned and facilitated the sessions, but collaborated with others as appropriate given the topic of the session, such as the Knowledge Management team or the gender technical working group. Some pause and reflects generated specific outputs, like CLA action plans, for project teams to take forward, while others generated feedback and thoughts on needed adaptations that we documented and shared with project leadership for consideration. The pause and reflect sessions were most successful when they engaged staff and facilitated reflection and input. (See figure 3.)

Figure 3. Quarterly Pause and Reflects



The project developed a custom, qualitative **indicator** to monitor and document learning and adaptation on the project (box 1), which we reported on annually. The indicator tracked a range of types of learning and adaptation, including context-driven adaptations, pause and reflects, after-action reviews, and learning activities. Initially, we used an Excel tracker to solicit entries for the indicator and submitted the completed tracker at the end of the year as the CLA deliverable. The tracker allowed staff to enter learning and adaptations at any time, although we encouraged entries on a quarterly basis. Mid-project, we incorporated the indicator into the monitoring and evaluation (M&E) system that we used for reporting against the project’s results framework. This streamlined the reporting process, however, CLA staff did not have visibility of entries during the quarterly reporting process so it was more difficult to actively encourage submission of specific entries. Only staff responsible for quarterly reporting for deliverables had access to the system, and only the CLA advisor could report on CLA that was not specific to a deliverable in the system (i.e., tied to a specific result in the framework). The CLA indicator was an accountability mechanism to ensure that learning and adaptation was occurring across teams on the project and a way to share that

Box 1. CLA Indicator

Indicator: Narrative description of program learnings generated through USAID Advancing Nutrition’s CLA approach that are being used by USAID Advancing Nutrition staff to adapt (Qualitative, custom)

Definition: Program learnings refer to knowledge gained as a result of USAID Advancing Nutrition’s CLA approach. Cases of adaptation refer to instances when a decision about how USAID Advancing Nutrition will operate was made based on lessons learned after reviewing data or reflecting on staff experiences.

Frequency: Annually

learning and adaptation with USAID through our formal project reporting mechanism. It also provided a specific entry point for discussing and encouraging CLA with teams. On the other hand, the CLA Excel-based tracker increased the reporting burdens for staff and was not a motivating way to engage staff in recording CLA. We monitored and documented external collaboration through another indicator in the results framework: the number of partnerships established or maintained, and in a quarterly report annex with a list of staff participation in communities of practice and technical working groups.

We used “**learning highlights**,” or short write-ups, to document lessons learned and implications for next steps or future activities. For example, we documented lessons learned from an activity that was going to be scaled-up or implemented in another country or when we planned to implement similar activities in the future. We mostly produced them for internal use, but we disseminated some deemed relevant for external audiences. We developed a common template for use across the project (annex 1). Activity teams drafted the learning highlights based on their experiences or to document learning gathered through a pause and reflect or other approaches like online surveys. Often, due to time constraints among activity teams, CLA staff wrote the learning highlights based on interviews with activity teams (interview guide in annex 1). The learning highlights were a useful way to rapidly document and internally disseminate lessons learned, prompt staff reflection, and spur discussions and reflection about how we should adapt future activities based on the lessons learned. For example, we developed a learning highlight on lessons learned from sustainable financing work in Ghana to inform similar work in Malawi. An internal EDI task force developed a learning highlight based on staff feedback on guidance the task force developed and on EDI integration progress to inform how they supported the project. USAID Advancing Nutrition Ghana developed a learning highlight to document lessons learned from how they engaged multi-sectoral public and private sector stakeholders to improve collaboration and coordination around nutrition. We used USAID CLA platforms to externally disseminate two learning highlights—we posted one on [using CLA to support COVID-19 adaptations](#) on the USAID Learning Lab and developed the other into an entry to the USAID CLA Case Competition.

We developed, disseminated, and supported uptake of **resources and templates** to support CLA implementation. Given the large size of the project, we needed to develop common resources and templates that staff and activity teams could use across the project (annex 1). The project had over 100 core-funded deliverables each project year (PY) and a dozen country work plans, so staff across the project had to take ownership of CLA and implement it. While CLA staff on the MEL team provided support as needed, it was not feasible for CLA staff to identify learning priorities, gather learning, and develop adaptations across the project. We used all staff, technical team, and country management meetings to share CLA resources and templates to encourage their use and to discuss with teams how they might apply them. We then provided support to teams as needed when they used the resources and templates, including brainstorming ideas and providing reviews. This was particularly useful during the pandemic when we had to adapt numerous activities (box 2).

We developed new resources and tools over the course of the project that were relevant for the project stage. As discussed above, some CLA resources supported reflection and documentation of learning and adaptation. Other resources and templates supported CLA implementation, including—

- guidance on considering CLA in work planning
- guidance on planning learning, including developing learning questions and activities to answer the questions
- template for learning plans/agendas/concept notes.

CLA in Country Programs

In PY4, Mission buy-ins significantly increased in number. Prior to that, it was feasible for CLA staff to provide support to the 3–4 country programs on an individualized basis. However, once the number of

buy-ins increased to 12, we needed a new way to efficiently engage with country teams, so we developed tailored CLA resources and templates for the country programs.

We **tailored guidance** on CLA work planning and learning planning for country programs. We also began holding quarterly **CLA meetings** with country teams, which included the MEL advisor for the country program, a technical lead (often the Chief of Party) from the country program, and the US-based MEL backstops. We used the quarterly meetings to conduct short trainings on CLA (e.g., how to plan and facilitate a pause and reflect), share project guidance and templates, and give country teams an opportunity to share CLA examples from their program. We also used the meetings to create and then iterate on country-specific CLA action plans in breakouts for each country. The action plans fostered discussion and agreement among country teams about their learning priorities and CLA staff were able to follow up with teams to check in on progress and provide technical assistance, coaching, or document review as needed to complete the action plan. The quarterly meetings provided an efficient way to engage key country program staff and US-based support staff and provided an opportunity for sharing across country teams.

Box 2. Adapting to the COVID-19 Pandemic

Like so many other U.S. Agency for International Development (USAID) projects and activities, USAID Advancing Nutrition quickly reassessed and adapted our programming as the COVID-19 pandemic spread across the globe. This unprecedented challenge propelled us into new and uncertain territory and reminded us daily how shocks require development projects to adapt quickly and skillfully in the face of uncertainty and instability. USAID's framework for CLA supports development partners in the face of unanticipated challenges and guided our efforts to pause, reflect, learn, and adapt regularly, based on the best real-time evidence available.

At the start of the pandemic, we had a CLA Plan in place and had begun raising awareness about the importance of CLA across the project. This strong foundation helped us quickly adapt to COVID-19 and make both project-wide and country- and activity-specific adjustments. We formed an internal COVID-19 Task Force with broad staff representation (i.e., representing different teams and levels) to assess needs and provide guidance to support project decision-making. The Task Force developed guidance and a tool to assess local risk and help teams reflect on how COVID-19 could affect project plans and what adaptations might be necessary. These findings informed discussions about USAID Advancing Nutrition activities and global nutrition work, generally, with USAID. The Task Force also developed an assessment tool for in-person events to help teams consider COVID-19 risk mitigation during event planning.

Understanding that teams across the project would face similar challenges, we also created several working groups to monitor and disseminate emerging information, synthesize best practices for virtual engagement, develop guidance for remote data collection, and help teams develop new skill sets to operate in virtual and hybrid environments (e.g., using online collaboration tools, facilitating virtual meetings). These working groups supported adaptations across the project and created a shared repository of information to prevent teams from duplicating work. More than 20 activities adapted approaches in the first year of the pandemic alone.

We also initiated several specific COVID-19 awareness and risk mitigation activities and our country programs tailored specific adaptations to their country context and activities. For example, in the Kyrgyz Republic, the team moved from in-person activities to remote implementation, including virtually recruiting and training community mobilizers, sharing videos on social media, and conducting household surveys by phone. This team also recruited and trained 900 social mobilization and nutrition activists via WhatsApp, and will soon start to provide virtual, rather than in-person, home visits to “1,000-day” households (those with a pregnant woman or child under two years of age).

Country programs used similar approaches to carry out CLA. While all country programs reported on the CLA indicator, they adopted other approaches that were useful for their work. The MEL team provided common resources and templates for use and encouraged country programs to use them in a way that met their needs. They used CLA to **improve project functioning**, including developing learning questions, carrying out learning activities, pause and reflects, and after-action reviews (box 2).

For example, USAID Advancing Nutrition Kyrgyz Republic identified a learning question around how gender roles and norms influenced the nutrition behaviors to inform activity adaptations. The team developed a qualitative research protocol to address that learning question and hired a firm to complete the study. USAID Advancing Nutrition Kenya used an internal learning activity to document learning on multi-sectoral nutrition strategies that are effective in improving nutrition. USAID Advancing Nutrition Uganda used pause and reflects to delve into what staff planned, adapted, and achieved in the last quarter, documenting what they learned to critically focus on what to adapt in their approach for the next quarter.

Country programs also used CLA approaches when collaborating with external **country stakeholders** to improve the support we provided and to foster peer learning. For example, USAID Advancing Nutrition Burkina Faso held a pause and reflect with government stakeholders to review progress and discuss adaptations to a nutrition indicator dashboard we developed to help the government monitor implementation of the Multi-Sectoral Strategic Plan for Nutrition. USAID Advancing Nutrition Ghana held a [national multi-sectoral nutrition coordination learning event](#) to build consensus on how sectors relevant to nutrition can better collaborate. (See also box 3).

In the last project year, we recognized the need to create a common process to identify key successes, lessons learned, and recommendations. We developed a **close-out package** (annex 1) that country teams could use and adapt, which included a pause and reflect agenda, short training on lessons learned and using M&E data to tell a story, and a key message template to synthesize messages for end-of-project dissemination. While these activities take time to complete, the country teams have been enthusiastic and several are incorporating these activities in close-out planning retreats.

Box 3. Using CLA to Create a Quality, Sustainable Model for Nutrition-Sensitive Agriculture Trainings for Female Producers in Rural Northeast India

USAID Advancing Nutrition, India works with women's self-help group (WSHG) members to promote increased agricultural productivity for enhanced incomes and dietary diversity. The project implements nutrition-sensitive agriculture training through its local implementing partner who provides training to community cadres of Assam State Rural Livelihood Mission responsible for training and counseling the WSHG members. In addition to promoting the adoption of nutrition-sensitive behaviors, a key objective of the nutrition-sensitive agriculture activity is to develop a scalable model that we can recommend and the government can replicate across the state.

After four months of implementation of the nutrition-sensitive agriculture training, the project implemented a series of CLA activities to inform adaptive management including a Google survey; an in-person pause and reflect event; and remote meetings to reflect on the successes, challenges, and opportunities. These CLA activities helped prioritize a series of actions including reducing the training target to focus more on quality rather than reach/numbers, revising the training module to reduce training duration and simplify the content, completing community sensitization activities before the trainings, as well as removing a USAID indicator deemed infeasible for collecting data.

By embracing a CLA approach, the project gathered perspectives from local partners, identified several challenges affecting quality implementation, and took corrective action to build a training model they could recommend to the Government of Assam. The process also helped to recognize the necessity of integrating adaptation mechanisms into the work plan and implementing them before expanding implementation.

Learning Agendas and Activities

Learning agendas/plans and activities have been an important way to focus technical and operational CLA on the project. We have co-created **learning agendas/plans** with USAID on technical topics that are broadly relevant to our work and USAID's investments in nutrition (table 1). The learning agendas/plans

allowed us to hold discussions with USAID and within the project about evidence gaps for the topics of interest and what kind of information USAID needed to fill those gaps and inform their decision-making. It was an iterative process to develop the learning questions and determine feasible ways to answer the questions with available resources. We continued to revisit some learning agendas with USAID on an annual basis. Once we developed the learning agendas/plans, we had activity teams implement the learning approach and produce learning which we disseminated across the project, with USAID, and implementing partners. Learning agendas/plans typically produced learning for application by USAID and future implementing partners, rather than to adapt our activities.

We used **internal learning activities** to document learning on specific technical topics (see examples in table 1). We also used learning activities to support operational improvements, such as by gathering staff perceptions and developing lessons learned on annual work planning or EDI efforts. We identified the need for these activities during work planning or in response to a particular need. The learning activities varied in scope and depth. We produced learning highlights for lighter touch learning activities and learning briefs for more in-depth activities.

Table 1. Project-Wide Learning Agendas/Plans and Activities

Agenda/Plan or Activity	Objective	Approach
Learning Agendas/Plans		
Women’s Diets Learning Agenda	Generate global learning, evidence, and innovative practices on how to improve women’s diets, with a focus on pregnant and lactating women, to inform the design and implementation of nutrition programs and interventions.	<ul style="list-style-type: none"> • Learning tracker, managed by working group • Project document review • Staff interviews
Capacity Strengthening Learning Agenda	Document lessons and recommendations for working effectively with local nutrition organizations, drawing from experiences from local capacity strengthening processes with the New Partnerships Initiative grantees, country program work, and other USAID Advancing Nutrition activities. USAID and implementing partners will use the learning to inform localization and capacity strengthening work.	<ul style="list-style-type: none"> • Baseline and endline organizational capacity assessments • Online survey • Pause and reflect • Staff interviews
Wasting Learning Plan	Synthesize learning to inform a multi-sectoral, coordinated approach to wasting prevention and treatment for USAID across the continuum of care in humanitarian and development contexts; build the evidence base to contribute to accelerating the prevention and reduction of wasting in both non-emergency and humanitarian settings (aligned with national, regional, and global strategies and initiatives).	<ul style="list-style-type: none"> • Descriptive literature review
Illustrative Learning Activities		

Agenda/Plan or Activity	Objective	Approach
Gender Learning Activity	Monitor progress on strengthening staff skills on gender integration after internal training and progress integrating gender on the project. The working group used the findings to improve training in the next year and how they supported gender integration across the project.	<ul style="list-style-type: none"> • Pause and reflect • Staff survey
Counseling Learning Activity	Building on the PY4 counseling review, pause and reflect, and additional conversations with USAID Advancing Nutrition staff, we identified two priority areas in which USAID Advancing Nutrition has generated learning to support improved counseling on nutrition/nurturing care—tools and mentorship/supportive supervision. We synthesized and documented that learning through the development of a two-part brief series. These briefs will inform and support Missions, implementers, and other stakeholders as they design and support counseling services for nutrition and nurturing care.	<ul style="list-style-type: none"> • Project document review • Staff interviews
Nutrition Governance Learning Activity	Synthesize learning across USAID Advancing Nutrition’s Mission-funded work on nutrition governance and disseminate lessons learned and recommendations for use by USAID and other implementing partners.	<ul style="list-style-type: none"> • Project document review • Staff interviews

Lessons Learned

There are several lessons learned from our work implementing and facilitating CLA on a large, global USAID project with core- and Mission-funding and a diverse work plan with dozens of workstreams under the direction of eight different teams. These lessons may be useful to inform follow-on projects or USAID-funded projects working in nutrition or other sectors:

- Processes need to be **flexible** to allow teams to apply CLA as appropriate for their activities, goals, buy-in from USAID points of contact and feasible given resources and staff capacity. The project had a range of priorities and implemented diverse activities, so staff could not conduct CLA with a “one-size-fits-all” approach.
- Providing **common resources and templates** across the project helped ensure some continuity in CLA across the project and helped make elements of CLA more feasible and approachable for staff. It was important that we tailored these and developed new ones over time as additional needs arose. It was most effective to disseminate these tools through meetings or trainings to introduce and demonstrate their use, rather than only sharing by email or Slack.
- Providing on demand **technical assistance and coaching** to US-based activity teams, country teams, and other USAID implementing partners allowed them to drive and own CLA, while providing the support they needed to implement CLA approaches or troubleshoot issues.

However, we were not always able to proactively facilitate learning processes given available resources and staff time.

- **Pause and reflects** were a useful way to convene project US-based staff around CLA on a routine basis to build a culture of CLA, strengthen CLA skills, and reflect on progress and needed adaptations. During the COVID-19 pandemic they provided a unique opportunity to bring the project together virtually (see “Culture” above) and problem solve adaptations together. While not all staff attended the sessions, staff typically found them engaging and regularly attended. Varying the content of the sessions and having participatory activities were most successful in engaging staff. Collating and sharing the outputs from the sessions with project leadership was important to enable follow up.
- Serving many of the same functions as the pause and reflects with US-based staff, holding **quarterly CLA meetings** with country MEL advisors, country leadership, and US-based MEL support was an efficient way to convene key staff across country programs, strengthen CLA skills, enable sharing on CLA across countries, and facilitate CLA action planning. This helped address some of the challenges we had faced engaging country staff and was a feasible way to engage country programs once their numbers grew.
- Country **CLA action plans** were a useful tool for country teams to develop and come to agreement on their CLA priorities. Country teams used the action plans as living documents, and we followed up with teams about progress and provided technical assistance and coaching as desired.
- The **CLA indicator** helped hold staff accountable for implementing CLA, but it increased an already high reporting burden on the project and was not an engaging way to involve staff in CLA. Using a CLA indicator may be helpful for projects that do not have other CLA deliverables to encourage CLA documentation and implementation.
- **Internal learning activities** were useful in informing adaptations for operational topics among US-based staff. For technical topics, the core-funded work was so varied that learning tended to focus on specific workstreams.
- **Learning agendas/plans** helped create a focus on technical areas of interest among the project and USAID. Making the plans iterative allowed for shifts in priorities and how we answered the learning questions. We designed these agendas to inform the direction of future projects or other implementing partners’ work rather than specific project activities.

Annex I. Resources and Templates

Included in table 2 and included below are resources and templates developed by the project for internal use that the follow-on and similar nutrition projects may find useful.

Table 2. USAID Advancing Nutrition Resources and Templates

Resource or Template Name	Description
Learning 101	This document summarizes how the project defined learning and how staff could incorporate learning activities and questions into activities.
Learning Highlight Template	Learning highlights summarize and distill key technical and/or operational learnings and adaptations that emerge from implementing project activities. This is a rapid way to document learning and adaptations. The document should be relatively short (e.g., five pages) and can serve as internal or external documents.
Learning Highlight Interview Guide	This resource outlines questions to ask project and partner staff to inform a learning highlight. Questions focus on gathering lessons learned, experiences implementing adaptations, and questions or remaining unresolved issues that can help inform future project activities.
Learning Planning Process	This document summarizes the process to use to determine learning goals and develop a plan to address the learning goals.
Learning Plan/Agenda/Concept Note Template	Planning document for project learning activities, guided by learning priorities formulated as learning questions. Learning activities can take many forms. They may be relatively unstructured, such as a participatory workshop with stakeholders, or more structured, such as a household survey. Learning activities may not require a design if they are fairly unstructured or they may apply proven research or evaluation designs, such as case studies or quasi-experimental designs; this template helps teams determine the rigor of the design.
Country PY5 Learning Priorities Template	This template walks teams through the process to 1) brainstorm learning needs, 2) prioritize learning for country programs, and 3) develop an action plan to address learning priorities.
CLA Considerations for PY5 Work Planning	This guidance document helps staff developing the project’s annual work plan. It provided guidance and considerations for how and when to incorporate learning in specific activity plans (rather than project-wide CLA).
CLA Country Close Out Package	This is a package of resources for country teams to use prior to close out to identify key successes, lessons learned, and recommendations for future programs. The package includes overall guidance, pause and reflect planning process and agenda, key messages template, slides on lessons learned and telling a story with M&E data, and a CLA action planning template.

Learning 101

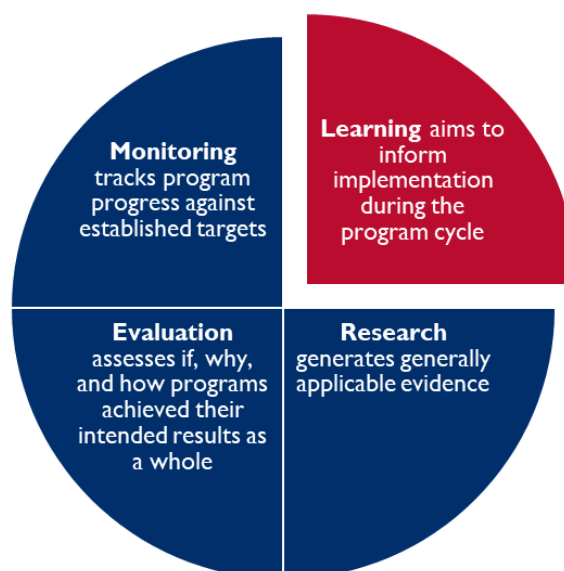
What Is Learning?

Learning is one component of figure 4. The goal of [USAID’s Collaborating, Learning, and Adapting \(CLA\) framework](#) (USAID Learning Lab n.d.) is often to apply learning within the program cycle to inform decisions and program adaptations. It can include technical learning, organizational learning, and using M&E for learning. Learning within the program cycle does not take the place of final evaluations or reflections, however, it aims to improve program effectiveness during implementation. The CLA framework is relatively new for USAID, however, many programs have long employed principles of CLA. The framework is useful to ensure that programs systematically generate and apply learning and adapt throughout the program cycle.

The line can be blurry about what “counts” as learning in a program. As development professionals, knowledge and evidence inherently informs our work on a daily basis. We typically refer to learning in the context of CLA as information or evidence at key decision points (e.g., systematic literature review to inform activity design, M&E data analysis to inform activity adaptation in a work plan), rather than the expertise or evidence that you apply on a regular basis (e.g., soliciting feedback from colleagues to solve a problem, applying your past experience to activity management).

Learning involves being open to having your views challenged, listening and really hearing others, learning how to improve, and at times recognizing shortcomings. This attitude shift and reflexivity is central to learning and improving. It is also important to remember that our position and background influence what and how we learn. As such, learning can look different for different people and it may involve challenging some people’s assumptions more than others.

Figure 4. Monitoring, Evaluating, Research, and Learning



Source: USAID LEARN 2020; Salib 2017

How Is Learning Different from Monitoring, Evaluation, and Research?

Learning has a few distinguishing features from monitoring, evaluation, and research (see figure 5).

Learning:

- aims to generate information and evidence to use within the program cycle to improve results
- is often operationalized by focusing on specific program components or activities.

While learning has unique aims, it can use evidence that comes from monitoring, evaluation, and research. Staff may generate learning through formal learning activities planned in advance, or it may emerge organically or unexpectedly during the course of implementation. Formal learning activities aim to be strategic, intentional, and address key areas of uncertainty that, if addressed, have high potential to improve program results, effectiveness, or cost-effectiveness.

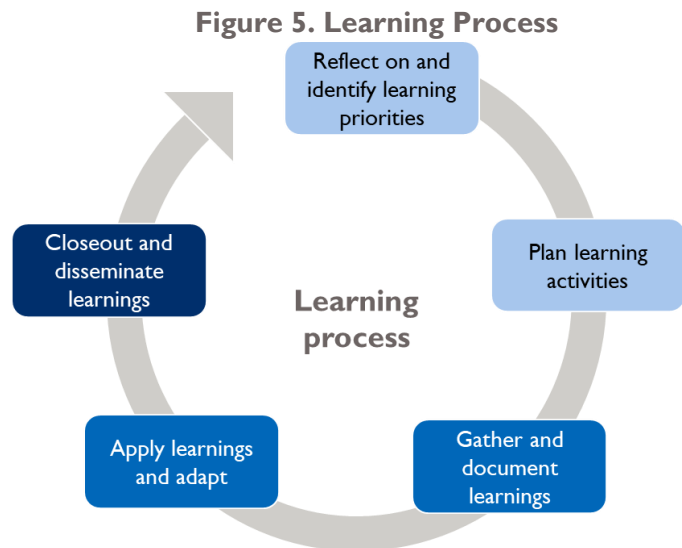
What Are Learning Activities?

Learning priorities formulated as learning questions should guide formal learning activities (see box 4). Learning activities typically involve several key steps as shown in figure 5. They are often iterative and seek to apply learning generated along the way, rather than waiting until an activity is complete.

Learning activities can take many forms. They may be relatively unstructured, such as a participatory workshop with stakeholders, or they may be more structured, such as a household survey. Learning activities may not require a design if they are fairly unstructured or they may apply proven research or evaluation designs, such as case studies or quasi-experimental designs. All learning activities should have a carefully thought-out plan, though! See the Learning Activity Plan template. Consider the project's Principles for Conducting Research when planning these types of activities.

You should tailor your learning activities to answer your learning questions and be feasible to implement given available time, funding, and staff skills. They should generate the type of evidence that you need—qualitative evidence for “how” and “why” questions, quantitative evidence for “what” and “how much” questions, or a combination. They should also generate evidence at the level of statistical rigor needed to make the target program decision or adaptation. See table 3 for different types of learning activities that you may use when you have high, moderate, or low uncertainty about the theory of change or activity design.

As part of this process, consider the ultimate purpose of the learning collected and for whom it is intended: USAID and other government donors, academic communities in partner or donor countries, local communities, local nongovernmental organizations, local healthcare professionals, etc. When relevant to the work under consideration in the learning activity, try to work with local partners to collect their learning as well.



Box 4. What Are Learning Questions?

“Learning questions or areas of inquiry help focus the learning agenda around opportunities to inform key stakeholders' decisions about programming, operations, strategies.”

— USAID Learning (in the) Lab: A Utilization-Focused Learning Agenda Playbook

Learning questions should...

- address key areas of uncertainty
- inform specific program design or implementation decisions
- generate the type of evidence with a sufficient level of rigor required to make program decisions
- be answerable within the time and resources available
- be unanswered in the sector or context.

USAID LEARN identifies three main types of learning questions (2020):

- questions that test and explore theories of change or development hypotheses
- questions that fill critical gaps in our technical knowledge
- questions that are used to develop scenarios and identify game changers.

Criteria to use when prioritizing learning questions:

- Is the question important to key stakeholders?
- Is the question aligned with high-level USAID or project priorities?
- Does the question address a critical current knowledge gap that has high potential for impact if answered?
- Will it generate information that will inform specific stakeholder or project decisions?
- Can you address the question using available resources in the available timeline?

Table 3. Learning Activity Options by Level of Uncertainty

	Exploratory: High Uncertainty	Semi-Structured: Moderate Uncertainty	Structured: Low Uncertainty
Example learning activities	<ul style="list-style-type: none"> • Desk review • Review program data • Review secondary data • Formative research • Case studies • Semi-structured interviews • Focus group discussions • Most significant change • Pivot log or process diary • Pause and reflects • After-action reviews 	<ul style="list-style-type: none"> • Prototyping • User experience testing • Participatory action research methods • Observation during site or home visits 	<ul style="list-style-type: none"> • Experimental design (if randomization is possible and need for statistical rigor is high) • Quasi-experimental design (randomization not possible and need for statistical rigor is high) • Low rigor A/B testing • Cross-sectional studies

	Exploratory: High Uncertainty	Semi-Structured: Moderate Uncertainty	Structured: Low Uncertainty
When to use	<ul style="list-style-type: none"> • Theory of change is not clearly defined • Have questions about what types of activities to use • Have questions about how or why something does or does not work • Need for statistical rigor is low 	<ul style="list-style-type: none"> • Theory of change is clearly defined • You have questions on how to refine or tailor activities • Need for statistical rigor is low 	<ul style="list-style-type: none"> • Theory of change is clearly defined • The activity design is clear • You have questions about which activity or combinations of activities are most effective or cost-effective

When Should I Consider Learning During Work Planning?

You should think about learning goals and opportunities early and often during work planning. It is important to incorporate learning into activities during annual work planning to ensure that learning is intentional, has USAID buy-in, and is funded. You may also be able to use the framing of CLA to generate buy in for an activity from USAID. While not all activities are likely to have a learning component, each core-funded technical team and each country team should aim to incorporate a learning component into at least one activity or design one standalone learning activity per project year. In addition, technical teams, country teams, and other local partners may consider activities where USAID Advancing Nutrition provides technical assistance to other partners or projects to support implementation of CLA in their work through facilitated or collaborative learning activities or support for adaptive management.

Learning opportunities should be targeted and prioritize areas where there is uncertainty and high potential for impact. Since we do not have unlimited time and resources, we should focus learning on a few key areas where it can make the most difference in our work. You may want to use a [pause and reflect exercise](#) (LEARN 2018) with your team as part of work planning to step back and think about learning needs and opportunities (see box 5). You can consider—

- What are key areas of uncertainty in linkages within our results framework?
- What are key areas of uncertainty in how to achieve results?
- What are recurring problems that we have not been able to solve?
- What are promising solutions or activities we want to test?
- Where is there opportunity for high impact if we could figure out how to solve a particular problem or could answer a specific technical question?
- Are we unsure of how to adapt proven solutions in a new context?

Box 5. Pause and Reflect

“Reflection on experience is a more useful learning practice than the accumulation of additional experience” (USAID LEARN 2020, 26)

You can use pause and reflect exercises to plan learning activities and on an ongoing basis to reflect on learning and adaptation as you go.

Source: [Dexis Consulting Group 2020](#)

- Are we implementing in a particularly complex or volatile environment?
- Is our activity in an early enough stage where we can apply learning to adapt the activity?
- Do we have the resources and USAID buy-in to invest in learning and to adapt programming based on learning?

Does My Activity Have Potential as A Learning Activity?

Activities may have potential as a learning activity or to have a learning activity component if they fulfill a few criteria:

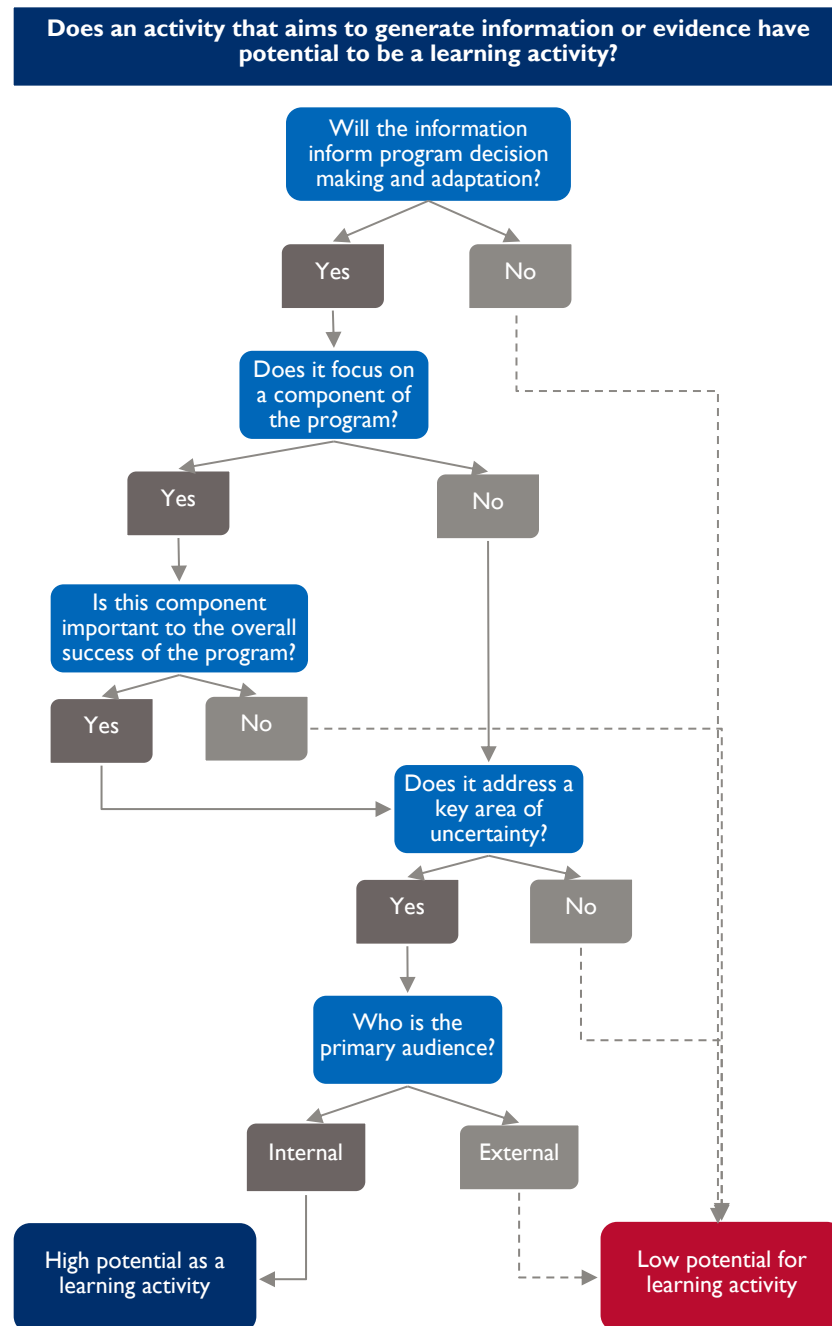
- aim to inform project decision-making and adaptation within the life of the program
- focus on a component of the project (not overall project M&E)
- focus on a key area of uncertainty
- internal project staff are the primary audience for the learning (although not necessarily the only audience).

See figure 6 for a decision tree to help think through whether an activity has high potential to be a learning activity for the project.

Ultimately, the program team should reflect on the goals of the learning and the program needs for learning to determine if an activity would be well suited to be a learning activity to inform program decisions and adaptation.

For example, USAID Advancing Nutrition may do a literature review on how gender relations influence nutritional outcomes at the household level. If the goal of the literature review is to inform how we should design activities to transform gender relations to improve nutritional outcomes, then it may be well suited to being a learning activity. The results of the literature review could then lead into additional learning activities as needed, like formative research or prototyping. However, if the goal of the activity is to inform an external audience about the state of the evidence on how gender relations influence nutritional outcomes, then the activity likely does not have high potential as a learning activity.

Figure 6. Learning Activity Criteria



References

- Dexis Consulting Group. 2020. "Evidence Base for Collaborating, Learning, and Adapting: A Summary of the Literature Review Update March 2020." *USAID LEARN*. Accessed July 20, 2023. https://usaidlearninglab.org/sites/default/files/resource/files/cla_literature_review_update_march_2020_final.pdf
- LEARN. 2018. "CLA Toolkit: Facilitating Pause and Reflect." Accessed July 20, 2023. https://usaidlearninglab.org/sites/default/files/resource/files/cla_toolkit_adaptive_management_facilitating_pause_and_reflect_final_508.pdf.
- Salib, Monalisa. 2017. "Establishing a Learning Agenda and Learning Agenda Template." *USAID LEARN*. Accessed July 20, 2023. <https://usaidlearninglab.org/resources/establishing-learning-agenda-and-learning-agenda-template>.
- USAID LEARN. 2020. "Learning (in the) Lab: A Utilization-Focused Learning Agenda Playbook." Accessed July 20, 2023. https://usaidlearninglab.org/sites/default/files/resource/files/external_learning_in_the_lab_a_utilization-focused_learning_agenda_playbook_202001.pdf.
- USAID Learning Lab. n.d. "Collaborating, Learning, and Adapting Framework & Key Concepts." Accessed July 20, 2023. https://usaidlearninglab.org/sites/default/files/resource/files/keyconcepts_twopager_8.5x11_v7_20160907.pdf.

Learning Highlight—Template

You can use this template to capture key learnings that emerge from implementing project activities. This learning can be technical and/or operational. The aim of this document is to serve as internal documentation for learnings and any related adaptations. Please include a photo if applicable.

We will use this documentation to inform future activities and we may use this information to develop CLA highlights to share externally with USAID and others. This document should summarize and distill key learnings and adaptations, rather than provide a detailed accounting. Aim for 2–5 pages.

Introduction

Write a few-sentence summary of the activity you implemented and learned from, or the circumstance or problem that prompted the learning. Include information on what was done, who did it, when, and where. Consider the project’s Principles for Conducting Research throughout.

Key Learnings and Takeaways

Summarize what you learned from this experience in a few paragraphs. When summarizing the learning, reflect on a few questions: What went well? What did not go well? Which goals were you able to accomplish and which were you not able to accomplish? What barriers and facilitators did you experience that affected your ability to achieve your goals? What surprised you or was unexpected?

Highlight key takeaways in a bulleted list (aim for three to six).

- Takeaway 1
- Takeaway 2
- Takeaway 3

Key Adaptations or Implications for Future Work

As applicable, provide a brief description of the adaptations you made or plan to make based on the lessons learned (e.g., how you are adapting the activity for the next quarter). Or, if the activity is complete, summarize the implications of the learning for future work (e.g., What should the project do differently next time?). The adaptations or implications may be relatively small, but they are still important to capture! You can use table 4 below to summarize the key lessons learned and adaptations.

Table 4. Key Adaptations and Implications by Lesson Learned

Lesson Learned	Adaptation or Implication

Learning Highlight Interview Guide— Template

Date	
Interviewee names	
Interviewee organization	
Interviewer name	
Notetaker name	
Link to recording	
Link to transcript	

Introduction/Aim of Interview

We are developing a short learning highlight to document lessons learned from [activity]. We are interested in the main lessons learned from your experience working on the activity and what takeaways you think are useful for future programs. We have a few questions we would like to ask about the activity. We will use the information you provide and information from any others to develop the learning highlight.

Do you have any questions before we start?

Questions

Introduction

1. What were the main objectives of this activity?
2. Which objectives have you been able to accomplish and which have you not been able to accomplish thus far?

Key Learnings and Takeaways

3. What went well during this activity? Please provide examples.
 - a. What factors facilitated your ability to achieve the objectives?
4. What challenges did the team face that affected your ability to achieve the activity objectives? Please provide examples.
5. How was the context of this activity unique? How did that impact the outcome of the activity?

Key Adaptations or Implications for Future Work

6. How did your activity make adaptations in response to lessons learned or challenges?
7. What do you think the main lessons learned are from this activity?

8. What recommendations would you give to others who were to implement a similar activity in the future? What would you do differently next time?

Closing

9. Is there anything else you would like to share about this activity?

Learning Planning Process

Step 1: Determine 1 to 3 Overall Learning Goals

You should target your learning goals and prioritize areas where there is uncertainty and high potential for impact. Since we do not have unlimited time and resources, we should focus learning on a few key areas where it can make the most difference in our work.

Reflection questions to determine learning goals:

- What are key areas of uncertainty in linkages within our results framework or in how to achieve results?
- What are recurring problems that we have not been able to solve?
- What are promising solutions or interventions we want to test?
- Where is there opportunity for high impact if we could figure out how to solve a particular problem or could answer a specific technical question?
- Are we unsure of how to adapt proven solutions in a new context?
- Are we implementing in a particularly complex or volatile environment?
- Is our activity in an early enough stage where we can apply learning to adapt the activity?
- Do we have the resources and USAID buy-in to invest in learning and to adapt programming based on learning?

Step 2: Determine Decision Points

Identify the specific programmatic decisions that this learning will inform:

- What decisions/program adaptations will the learning inform?
- Who will use this learning to make the decisions/program adaptations?
- What type of evidence is needed to make these decisions?

Step 3: Develop 1 to 5 Learning Questions

Develop 1–5 learning questions to answer to achieve the goals and generate the evidence needed to inform program decisions. The learning questions should—

- Fill critical gaps in our technical knowledge.
- Generate the type of evidence that you need to make programmatic decisions.
- Be answerable within the time and resources available.

Step 4: Determine Learning Approach

Determine how you will answer the learning questions and map learning activities to each learning question. Learning activities should be feasible within available time, resources, and staff skills. Learning activities should generate qualitative evidence for “how” and “why” questions or quantitative evidence for “what” and “how much” questions.

The table below shows learning activity options based on whether you have a high level of uncertainty, a moderate level of uncertainty, or a low level of uncertainty.

Table 5. Learning Activity Options

Level of Uncertainty	Example Learning Activities	When to Use
Exploratory: High Uncertainty	<ul style="list-style-type: none"> • Desk review • Review program data • Review secondary data • Online survey • Pause and reflect • After-action review • Formative research • Case studies • Semi-structured interviews • Focus group discussions • Most significant change 	<ul style="list-style-type: none"> • Theory of change is not clearly defined • Have questions about what types of interventions to use • Have questions about how or why something does or does not work • Need for statistical rigor is low
Semi-structured: Moderate uncertainty	<ul style="list-style-type: none"> • Prototyping • User experience testing • Participatory action research methods • Observation during site or home visits 	<ul style="list-style-type: none"> • Theory of change is clearly defined • You have questions on how to refine or tailor interventions • Need for statistical rigor is low
Structured: Low uncertainty	<ul style="list-style-type: none"> • Experimental design (if randomization is possible and need for statistical rigor is high) • Quasi-experimental design (randomization not possible and need for statistical rigor is high) • Low rigor A/B testing • Cross-sectional studies 	<ul style="list-style-type: none"> • Theory of change is clearly defined • The intervention design is clear • You have questions about which intervention or combinations of interventions are most effective or cost-effective

Learning Plan/Agenda/Concept Note— Template

Objective

This is a summary of the overall goal/aim of the learning activity and how you plan to use the learning to adapt current or future programming.

Background

Provide a brief description of the problem and the current state of evidence/knowledge gaps.

Learning Questions

List one to five learning questions that you will answer through this activity. The learning questions should ([USAID LEARN 2020](#))—

- address key areas of uncertainty
- inform specific program design or implementation decisions
- generate the type of evidence with the level of rigor required to be able to make the anticipated decisions
- be answerable within the time and resources available
- be unanswered in the sector or context.

Three types of learning questions:

1. questions that test and explore theories of change or development hypotheses
2. questions that fill critical gaps in our technical knowledge
3. questions that are used to develop scenarios and identify game changers.

Learning Approach

Summarize overall design of learning activity here. If you will have multiple phases to your learning activity, then describe the phases here (e.g., We will first answer learning question 1, then determine activities to answer questions 2 and 3). In table 6, use one row per learning question and outline the learning activity or method that you will use to answer the question, what themes or indicators you will gather data on, and what the data sources are. This is meant to be a short summary of the approach. Some learning activities may require development of a full protocol, such as case studies or impact evaluations.

Table 6. Learning Questions, Methods, Themes, and Data Sources (Examples)

Learning Question	Learning Activity or Method	Themes/Indicators	Data Collection Methods and Sources
1. What are effective approaches that facilities can use to adopt Baby-Friendly Hospital	Case studies	<ul style="list-style-type: none">• Factors that facilitated adoption of guidelines• Factors that constrained	<ul style="list-style-type: none">• Desk review of program documents• Key informant interviews with government experts

Learning Question	Learning Activity or Method	Themes/Indicators	Data Collection Methods and Sources
Initiative guidelines?		adoption of guidelines	<ul style="list-style-type: none"> Site visits of facilities
2. How are external stakeholders using the Infant and Young Child Feeding Image Bank? Do they need additional support to use the products?	Online survey	<ul style="list-style-type: none"> User satisfaction with images User satisfaction with website experience Additional support desired by users 	<ul style="list-style-type: none"> Online survey of sample of website users
3. How can care models be replicated effectively and with high quality?	Key informant interviews	<ul style="list-style-type: none"> Types of support 	

Sampling

If you are doing primary data collection, describe the sampling approach and anticipated sample size for data collection activities (e.g., number of interviews, focus group discussions, or surveys by respondent group). For qualitative data, you should conduct interviews with 6 to 12 respondents per respondent group (Guest, Bunce, and Johnson 2006) and hold 3 to 5 focus group discussions (Namey et al. 2016) per respondent group to reach data saturation. For large-scale surveys, include sample size calculations.

Data Analysis

Describe how you will analyze the data, including any tools or software you will use.

Activity Management

List roles and responsibilities for key staff. Table 7 is an illustrative example. Your activity may not require all these roles or may require a larger team.

Table 7. Roles and Responsibilities

Role	Name	Responsibilities
Activity lead		<ul style="list-style-type: none"> Overall technical leadership and vision Lead activity planning Manage activity execution Manage communication with USAID Oversee analysis and report writing
Reviewer		<ul style="list-style-type: none"> Review all deliverables before submission to USAID

Role	Name	Responsibilities
		<ul style="list-style-type: none"> Review activity plan and instruments
Senior to mid-level analyst		<ul style="list-style-type: none"> Data collection, including travel if needed Lead data analysis Lead report writing
Junior analyst		<ul style="list-style-type: none"> Complete document review Organize and clean data Analyze data under direction of senior/mid-level analyst

Deliverables, Learning Products, and Dissemination

Outline relevant contract deliverables or learning products that you will produce (need not be formal, written products if not a contract deliverable).

Table 8. Products, Audience, and Dissemination

Product	Product Type (deliverable, learning product)	Product Description	Key Audience	Mode(s) for Dissemination
PowerPoint presentation	Learning product	PowerPoint that summarizes learnings	USAID Advancing Nutrition Social and Behavior Change team	Brown bag presentation and discussion
Brief	Contract deliverable	5–7 page brief that summarizes learnings and recommendations	USAID	Electronic distribution after presentation

Work Plan

Outline the anticipated work plan for the activity, including who is responsible for each task (individuals and/or partners). Tailoring the Gantt chart may be useful. As part of work planning, determine what USAID approvals are required for activity.

Table 9. Gantt Chart

Task	Responsible Party	Q1	Q2	Q3	Q4
Identify learning priorities and questions					
Develop learning activity plan					
Design data collection instruments					
Hire consultants and/or data collection firm as needed					
Obtain Institutional Review Board approvals					
Collect data					
Ongoing review of learning or learning checks					
Analyze data and finalize learnings					
Develop learning products/deliverables					
Disseminate learning					

References

- Guest, Greg, Arwen Bunce, and Laura Johnson. 2006. “How Many Interviews Are Enough? An Experiment with Data Saturation and Variability.” *Field Methods*. 18(1):59–82. <http://dx.doi.org/10.1177/1525822X16640447>
- Namey, Emily, Greg Guest, Kevin McKenna, and Mario Chen. 2016. “Evaluating Bang for the Buck: A Cost-Effectiveness Comparison Between Individual Interviews and Focus Groups Based on Thematic Saturation Levels.” *American Journal of Evaluation*. 37(3):425–440. <https://doi.org/10.1177/1098214016630406>

Additional Resources

- USAID LEARN. 2020. *Learning (in the) Lab: A Utilization-Focused Learning Agenda Playbook*. Washington, DC: USAID. <https://usaidlearninglab.org/lab-notes/learning-agenda-playbook-shares-%E2%80%98how%E2%80%99-utilization-focused-approach>
- USAID Learning Lab. n.d. “CLA Toolkit Overview.” Accessed July 20, 2023. <https://usaidlearninglab.org/cla/cla-toolkit>.
- USAID Learning Lab. n.d. “CLA Case Competition: Browse our Collection of CLA Case Studies.” Accessed July 20, 2023. <https://usaidlearninglab.org/cla-cases>
- USAID Learning Lab. 2015. “An Analysis of what CLA Looks Like in Development Programming.” Accessed July 20, 2023. <https://usaidlearninglab.org/library/collaborating-learning-adapting-analysis-what-cla-looks-development-programmin>

Country PY5 Learning Priorities—Template

This template is to guide the MEL country advisors to determine learning priorities for their country program in PY5 (step 1 and 2) and to plan how to address these learning priorities (step 3). These learning priorities may support implementation in the final year of the project or to document and disseminate learning to share with USAID and other stakeholders.

Country:

CLA MEL Advisor:

Step 1: Brainstorm Learning Needs

Reflect on learning priorities by thinking about the following questions:

- What learning or CLA needs are stated in your country work plan for this year? (Refer to the tracker with work plan language on CLA.)
- What key questions does the team have about how to implement activities in the PY5 work plan? Is there learning the team can generate to help answer those questions?
- What kinds of learning or lessons learned do we need to document for end-of project dissemination products or events?

List of learning needs:

-
-
-
-
-

Step 2: Prioritize Learning for PY5

Identify 1 to 3 top learning priorities that you brainstormed in step 2. You should prioritize any learning needs in the work plan. For other learning priorities, think about which are most important for completing PY5 implementation and for disseminating learning to USAID and other stakeholders.

Top 3 learning priorities:

- 1.
- 2.
- 3.

Step 3: Develop Action Plan to Address Learning Priorities

Complete the table below to determine how to address each of the learning priorities identified in step 2. Think about—

- How will you document or generate the learning? Options include reviewing project documents, holding team reflections or discussions, interviewing staff or stakeholders, etc.

- *What output will you use to document and share the learning (e.g., PowerPoint slides, a learning brief or highlight, a blog or LinkedIn post, a poster)? Will you create a document or contribute information for an event or other product that is already being planned?*
- *In what quarter will you complete the output?*
- *Who should be involved in generating/documenting learning? This can include country- and US-based staff as needed.*

Table 10. Learning Action Plan

Learning Priority	Approach to Document or Generate Learning	Output Type	Quarter Deadline	Staff Support

CLA Considerations for PY5 Work Planning

This guidance addresses how to incorporate CLA into PY5 work planning. This guidance primarily focuses on activity-level planning. The MEL team will separately develop ideas for cross-team and cross-country learning.

Why Should I Consider Learning during Work Planning?

Incorporating learning into activities during annual work planning ensures that learning is intentional, you have USAID buy-in, and you allocated sufficient level of effort (LOE) and time for learning. You may also be able to use the framing of CLA to generate buy-in for an activity from USAID. While not all activities will have a learning component, each activity should consider whether learning should be a component in PY5. You may propose a learning component or deliverable to USAID when proposing an activity, or incorporate learning activities or goals when developing activity summaries.

As we move into PY5, the “L” in CLA will be the main focus. This learning may be about how we have collaborated or adapted, but the focus should primarily be on learning. In the last year of the project, we want to reflect on, synthesize, and share what we have learned on an activity, team, and project level about—

- **technical learning:** additions to the knowledge base on how to improve multi-sectoral nutrition programming
 - This can include the program implications of research studies; learning from developing and implementing guidance; lessons on designing and implementing research; learning on effective implementation approaches (e.g., capacity strengthening); and learning on effective programming (e.g., activities in health systems, food systems, or in humanitarian contexts).
- **operational learning:** lessons on effective collaboration methods, tools, and processes that have been useful to streamline and organize activities, and adaptations made to program implementation (e.g., shifts to virtual implementation).

The focus of synthesizing and sharing learning should be on content that you think would be valuable for a follow-on, USAID and implementing partners, other nutrition stakeholders, or the nutrition community more broadly. You can reflect on—

- What would you have wanted to know when we started the project?
- What could be done differently next time?
- What have we learned about nutrition that we did not know when we started the project?
- What have we learned about how to implement effective nutrition programming, whether through direct implementation or through support to other nutrition actors?

How Can I Collect Learning in PY5?

There are several possible ways that activities can develop and collect or document learning in PY5. You can use these approaches at the activity or team level as appropriate either during implementation or after an activity is complete. Please continue documenting all collected learning in the project CLA tracker:

- **Review program data** (e.g., project indicators, data from grantees) to identify achievements and limitations and prompt discussion about what worked well and why, what challenges you faced,

and what you or others could improve in the future. You can do this during or after activity implementation.

- **Semi-structured interviews or focus group discussions** with activity teams or stakeholders to explore implementation experiences, lessons learned, and recommendations. This can be informal and still be valuable with only a few individuals. You can do this during or after activity implementation.
- **Most significant change discussions** to gather narratives about what changes occurred and how the change occurred. This is best done at the end of an activity.
- **Pivot log or process diary** can be useful during implementation to track changes/adaptations and lessons learned.
- **Pause and reflects** can be useful during implementation to reflect as a group on an activity, lessons learned, and implications for future programming.
- **After-action reviews** can be useful after an activity is complete to reflect as a group on an activity, lessons learned, and implications for future programming.

The MEL team is available to support activities and teams to implement these for their activities, including developing templates for pivot logs or interview guides, or facilitating discussions, interviews, focus group discussions, and after-action reviews. Please consult the MEL team to estimate LOE for this support.

Does My Activity Have the Potential to Include a Deliverable that Focuses on Learning?

Activities may have potential to include a learning deliverable or to have a learning component as part of a deliverable if they fulfill a few criteria:

- Aim to inform program decision making and adaptation within the life of the program.
- Contribute technical learning about implementation or technical assistance approaches that could be of use to USAID or other implementing partners.
- Contribute technical learning about how to improve nutrition programming.
- Contribute to the evidence base about nutrition status or factors that influence nutrition.
- Contribute operational learning that would be of use to a follow-on, including equity, diversity, and inclusion, and localization strategies.
- Provide insights on key evidence gaps or future research priorities.

The following are other examples of possible learning-focused deliverables for PY5:

- brief or frequently asked questions on doing dietary intake studies to post on the website
- lessons learned document on how to develop and pilot nutrition-related guidance (e.g., with insights generated during an after-action review).

How Can I Incorporate Learning into an Activity and/or Deliverable(s)?

Depending on what makes the most sense for your activity or team, there are several ways you can incorporate learning into an activity and/or deliverable:

1. Incorporate LOE and plan time in detailed implementation plans for documenting learning and adaptations.
2. Incorporate learning goals and activities in activity summary.
3. Integrate CLA directly in dissemination products or deliverables.
4. Plan deliverables focused on learning.
5. Plan to contribute to cross-activity and cross-team learning products.

How Does Learning Contribute to Dissemination and Vice Versa?

The primary goal of much of the project's work in PY5 will center on the dissemination of our work through webinars, conferences, publications, and guidance or report documents (read the KM product guidance for more examples of products). In doing so, we will be working toward integrating CLA in two pathways: (1) identifying and documenting learning (technical and operational) that has come about throughout the implementation of our project and (2) disseminating our learning beyond the internal project for immediate and longer-term reference and use by future projects, USAID, and the broader nutrition community. Therefore, dissemination and learning are directly interrelated as we work toward project close-out and consider our lasting legacy. In doing so, we should focus on how the learning we have experienced and gathered can inform future decision making; what's the "so what" from our activity, deliverable, guidance document, multi-sectoral meeting, community of practice, etc.? Keep in mind that collecting instances of collaboration, learning, and adaptation can look very different based on the type of activity in question, such as the experience of developing or implementing nutrition counseling, implementation implications for research, or capacity strengthening among government counterparts.

All dissemination materials produced in PY5 should highlight lessons learned during the process of producing an activity, deliverable, or work stream: how we reflected, adapted, collaborated, what we learned, what we would do differently next time, etc. You should integrate learning into dissemination materials overtly, if possible, with a slide or written section outlining lessons learned and adaptations or implications. If this is not possible, then activity teams should at minimum have internal discussions on lessons learned that might inform the dissemination method, and document the results of such discussions in the project CLA tracker.

CLA Country Close Out Package

Internal Guidance: Identifying Key Messages in Preparation for Dissemination

Proposed Process for Synthesizing our Key Messages as Country Programs Close

What Does This Include and for What?

As our project closes, we aim to reflect on our implementation to identify and synthesize—

- **Key successes:** A central part of the final closeout events and final report will be communicating our key successes or the “so what” of the project. Think through the story we want to tell about what our project achieved and why it matters. All of the country programs have a number of successes across different activities, so it is useful to think about the key successes and stories we want to tell across those activities.
- **Lessons learned:** At a minimum, our country programs will be hosting final closeout/learning events and producing a final report, which includes a section on lessons learned. This requires us to synthesize our final learnings. Additionally, countries may want to document additional learning outside of final learning events or the final report, in the form of white papers, briefs, learning documents, social media posts, etc., to ensure your learnings are well documented and disseminated for the broader nutrition community.
- **Recommendations for future programs:** Some Missions would also like to see us provide recommendations for future programs in final events and the final report. If this is the case for your country program, then we also need to reflect on what recommendations we have for future programs building on our successes, lessons learned, and existing opportunities.

Effective planning ensures we are successful in our final learning and dissemination efforts. This guidance provides country programs with the process to successfully synthesize project learning and prepare for final events and dissemination products.

The key output of this process is a document with key messages that we want to include in final events and dissemination materials. Agreeing upon key messages will make it easier to develop these materials and clearly articulate what we accomplished, why it matters, what we learned along the way, and what we recommend for future programs.

Suggested Process

We suggest that countries complete the following process, adapting the timeline as needed, to effectively plan for final learning and identify key messages. We have created specific materials for this process, which we link to in table 11 below. The country team should lead these activities with input from the backstopping team (lead technical backstop, MEL advisors, CLA advisors, project officers). The backstopping team is also available to provide facilitation support.

Key Messages

Key messages are the overall takeaways we want to share about the country program. These should include our key successes and our main lessons learned.

Table 11. Country Program Learning: Suggested Process

Description	Activity to Support Completion and Roles	Materials to Use	Outputs	Timeline
Step 1: Determine/Confirm Successes and Learning through a Pause and Reflect				
<p>Hold a pause and reflect meeting to determine: (1) the main lessons learned and (2) the main successes that you would like to share with external stakeholders.</p> <p>The pause and reflect should be 2–3 hours. This is an internal project meeting. The meeting should have broad participation from technical staff on the country team (including district/state-level staff and backstopping team as appropriate). You may consider holding multiple meetings to focus on different topic areas or to break staff into smaller groups.</p>	<p>Country team:</p> <ul style="list-style-type: none"> Plan and schedule meeting, including adapting pause and reflect materials as needed Facilitate pause and reflect (note: the backstopping team can provide facilitation if desired) Assign notetaker Draft key messages document or ask backstopping team to create first draft <p>Backstopping team:</p> <ul style="list-style-type: none"> Review revised pause and reflect materials and support as needed If the meeting will be online or hybrid, participate and help take notes on key messages Create a first draft or review key messages document based on pause and reflect 	<p>Close-out pause and reflect materials:</p> <ul style="list-style-type: none"> Slide deck Meeting planning process and agenda 	<ul style="list-style-type: none"> Detailed notes from meeting, including outputs from brainstorming or breakout activities. You will need these for the internal review meeting. Recording from meeting if conducted online/hybrid 	<p>Hold pause and reflect meeting:</p> <ul style="list-style-type: none"> At least two months in advance of when draft materials are due for dissemination (e.g., final event)
Step 2: Host an Internal Review Meeting to Determine Key Messages				

Description	Activity to Support Completion and Roles	Materials to Use	Outputs	Timeline
<p>Host an internal review meeting to review the key messages draft from the pause and reflect to: (1) agree on final list of key messages, (2) agree on language for key messages, (3) determine data/proof points to support key messages, and (4) identify if have needs for further data collection and if time and resources allow for additional data collection (for step 2B).</p> <p>The meeting should be 1.5–2 hours. This is an internal project meeting. It could involve the full team again or focus on country leadership.</p>	<p>Country team:</p> <ul style="list-style-type: none"> ● Schedule review meeting ● Facilitate review meeting ● Assign notetaker ● Finalize key message document <p>Backstopping team:</p> <ul style="list-style-type: none"> ● If meeting will be virtual or hybrid, participate and help take notes on key messages ● Support in finalizing key message document based on pause and reflect 	<p>Review meeting materials:</p> <ul style="list-style-type: none"> ● Meeting agenda ● Key messages summary template ● Notes from the pause and reflect with successes, lessons learned, and recommendations 	<ul style="list-style-type: none"> ● Detailed notes from meeting ● Recording from meeting if conducted virtually/hybrid ● Final key messages document for use when developing final event materials and final report 	<p>Hold review meeting:</p> <ul style="list-style-type: none"> ● Within two weeks after pause and reflect <p>If not completed during the meeting, finalize key messages document:</p> <ul style="list-style-type: none"> ● Within one week of review meeting
Step 2B: Plan for Any Light Touch Data Collection (only if needed and time/resources allow)				
<p>Hold a planning meeting to: (1) discuss options for how to complete additional data collection if identified in step 2; (2) agree on data collection options (e.g.,</p>	<p>Country team:</p> <ul style="list-style-type: none"> ● Schedule the planning meeting ● Facilitate the planning meeting ● Assign a notetaker 	<p>To summarize data collection plans and next steps:</p> <ul style="list-style-type: none"> ● End of project CLA action planning template 	<ul style="list-style-type: none"> ● Detailed notes from meeting ● Recording from meeting ● Final action plan 	<p>Hold planning meeting:</p> <ul style="list-style-type: none"> ● Within 1–2 weeks after internal review meeting

Description	Activity to Support Completion and Roles	Materials to Use	Outputs	Timeline
<p>pause and reflect, key informant interviews, focus group discussions, online feedback survey) to move forward with given time and resource constraints; and (3) identify next steps and who is responsible (including developing detailed data collection plans, collecting the data, and analyzing the data). (MEL and CLA backstopping support is available as needed).</p> <p>This meeting should be online or hybrid so the backstopping team can participate. It should be 1–1.5 hours and should include key leadership and technical staff as appropriate.</p>	<ul style="list-style-type: none"> • Draft action plan or ask the backstopping team to create the first draft <p>Backstopping team:</p> <ul style="list-style-type: none"> • Participate in the planning meeting • Draft or review action plan 		<ul style="list-style-type: none"> • Once additional data collection is complete, update key messages document 	<p>Draft action plan:</p> <ul style="list-style-type: none"> • Within one week of planning meeting
<p>Step 3: Use the Key Messages to Develop the Dissemination Materials</p>				
<p>Use the key messages document in final reports and to develop final event slide decks and other materials as</p>	<p>Country team:</p> <ul style="list-style-type: none"> • Refer to key messages document when developing 	<p>Completed key message document</p>	<ul style="list-style-type: none"> • Final event slides • Final report • Other products as appropriate 	<p>By the KM deadlines for the final event and final products</p>

Description	Activity to Support Completion and Roles	Materials to Use	Outputs	Timeline
<p>needed. The key messages should feature prominently in final products, as these are the key successes and lessons learned identified by the team.</p>	<p>final event slides and final report</p> <p>Backstopping team:</p> <ul style="list-style-type: none"> Refer to the key messages document when reviewing final products and if you help draft any products 			

USAID Advancing Nutrition: Country Programs Presentation on Identifying Lessons Learned and Using Data for Storytelling



USAID Advancing
Nutrition CLA for Cou

USAID Advancing Nutrition: Country Close-Out Pause and Reflect Planning Process and Sample Agenda

You can use this template to develop a meeting agenda and structure for the pause and reflect. Pause and reflect sessions can generate learning, knowledge, and even data that contribute to evidence-based decision-making and adaptive management. The sample pause and reflect agenda can be used as is, or adapted to fit your needs.

Steps to Plan a Pause and Reflect

Below are suggested steps to plan the country pause and reflect to identify successes and lessons learned to use for final reporting and close out events.

Step 1: Determine Meeting Focus

Instructions

Decide which project strategies and/or activities to focus on in the pause and reflect. Depending on the size of your country program, you can discuss all strategies and activities, or determine 1–3 priority strategies and/or specific activities to focus on in the meeting. If your team has a good sense of the successes and lessons learned on specific strategies or activities, you may want to focus on other project components during the pause and reflect meeting.

Table 12. Meeting Priorities

Meeting Focus	Strategy	Activities
1		
2		
3		

Step 2: Plan Logistics and Roles

Instructions

Think about when and where this pause and reflect will take place and who will lead each portion:

- How long will the meeting be?
- Will this be an in-person or virtual pause and reflect? Will there be components that are both (hybrid)?
 - If all in-person, do staff need to travel to attend?
- Who on the project team will be invited to participate?
- Who is best positioned to lead/facilitate each portion of the agenda?

- Who will take detailed notes?
- Who will share their screen with the slides? Who will record the meeting if it is conducted online or hybrid?
- What materials you might need to prepare or gather for the meeting?
 - Potential materials may include—
 - virtual [Menti Poll](#)
 - Jamboard
 - Google or PowerPoint Presentation
 - white or chalk board
 - poster paper and markers

Step 3: Develop the Agenda

Instructions

Work with your team to develop the agenda based on the timing and prioritization of the strategies. Consider two or three interactive discussion formats to identify successes and lessons learned. Varying the type of discussion format will keep the team engaged, fosters reflection, and will give staff multiple opportunities to share. See end of this document for a sample agenda.

Options for Discussion or Activity Formats

- *World Cafe*: group rotates through small table discussions with a facilitator and each table focuses on a different topic/key question
- *Voting/ranking exercises*: collaboratively prioritize issues or solutions
- *Chalk Talk*: silent activity to write answers to reflection questions (helpful for those who may be more comfortable writing or for sensitive subjects)
- *Scenario planning*: identify different possible scenario and brainstorm how to adapt
- *Polls* using [Menti](#)
- *Kolb learning cycle*: small group discussions to reflect on the “Why? What? So what? Now what?”
- *Storytelling*: small group alternative to typical presentations to share successes or examples of what worked and why.

Additional Resources on Pause and Reflects

- [USAID Learning Lab](#)
- [Facilitating Pause & Reflect](#)
- [Pause and Reflect Workshop Guide](#)
- [Reflection Methods: Practical Guide for Trainers and Facilitators](#)

Sample Pause and Reflect Agenda

This is a sample agenda for a two-hour end of project pause and reflect. You can adjust and update the agenda as needed. The backstopping team can review edits or help make adjustments as needed.

For the group activities, think about the size of the group and the format to determine how to break into groups. The group activities should take place in groups of about 3 to 6 people. If your team is small, you could do the activities together. If the meeting is in-person, each group should sit at separate tables or spread out. If online, use breakout rooms for the groups. If the meeting is hybrid, put the virtual participants into a breakout room and have the in-person participants break up into groups in the room.

Table 13. Sample Pause and Reflect Agenda

Time	Description	Materials	Roles
5 minutes	<ul style="list-style-type: none"> Welcome Review objectives and agenda 	Slide deck	Facilitator: XXX
40 minutes	<p>Identifying Successes (small group activity)</p> <ol style="list-style-type: none"> Each person writes down (on sticky notes or cards in person, or on a Jamboard online): <ol style="list-style-type: none"> 1 accomplishment they are most proud of from the project 2–3 key successes or accomplishments from the project Group shares what they wrote down and organizes them into groups by theme (e.g., successes with government, capacity strengthening, data use) Choose the two most common themes that the group identified and discuss: <ol style="list-style-type: none"> What did we do as a project that contributed to these successes? Why do these successes matter? Why are they important? 	<p>In person/hybrid:</p> <ul style="list-style-type: none"> Sticky notes or note cards Pens <p>Online:</p> <ul style="list-style-type: none"> 1 Jamboard for each group 	<p>Facilitator (to explain activity to everyone, walk around and check in on groups, keep time): XXX</p> <p>Notetaker: XXX (need one per group)</p>
15 minutes	<p>Ranking Successes (full group)</p> <ol style="list-style-type: none"> Hang a few poster boards or open a new Jamboard Ask one person from each group to write each of the common themes identified in the group. Write each success separately and leave a little space between each. Have multiple posters so that someone from each group can do this at the same time. Have everyone walk up and review the successes and use a marker or sticker (or add “+1” in sticky note on Jamboard) to vote on which 	<p>In person/hybrid:</p> <ul style="list-style-type: none"> Large blank posters/ pieces of paper Markers or small stickers <p>Online:</p> <ul style="list-style-type: none"> 1 Jamboard for each group 	Facilitator: XXX

Time	Description	Materials	Roles
	they think are the project's top three successes.		
10 minutes	Break		
45 minutes	<p>Identifying Lessons Learned and Recommendations (small group activity)</p> <ol style="list-style-type: none"> 1. Have one breakout room or one table for each strategy in the work plan that was prioritized for this meeting (planning step 1). Ask participants to choose a group/table for a strategy they worked significantly on. 2. Discuss lessons learned and recommendations related to the specific strategy. Reflection questions: <ol style="list-style-type: none"> a. What are your implementation key lessons learned from activities under this strategy on USAID Advancing Nutrition? b. What are your technical lessons learned about achieving results under this strategy on USAID Advancing Nutrition? c. What recommendations would you give others to scale-up or strengthen current activities? d. What would you do differently next time, or what would you do if you had more time on the project? 3. Rotate once to allow participants to discuss another strategy. If participants are still actively discussing or did not work on another strategy, they can stay at the same table. Groups should repeat discussion questions listed above. 	<p><i>Optional materials:</i></p> <p>In person/hybrid:</p> <ul style="list-style-type: none"> • Sticky notes or note cards • Pens <p>Online:</p> <ul style="list-style-type: none"> • 1 Jamboard for each group 	<p>Facilitator (to explain activity to everyone, walk around and check in on groups, keep time): XXX Notetaker: XXX (need one per group)</p>
5 minutes	Closing and next steps		Facilitator: XXX

USAID Advancing Nutrition: Country Close Out Key Messages Template

You can use this template to summarize the key messages that you will use in final products and events related to successes, lessons learned, and recommendations (if applicable). These should be the **most important takeaways** that you want to communicate to an external audience. Remember that events and the final report will have more detail on what the country program did. The key messages should be a concise list of the most important takeaways that you want someone to know about the project.

Use this document to agree on the key messages during the internal review meeting. As needed, finalize this document after the internal review meeting.

Key Successes

Use the table template below to—

- List each key success (use one row per success). These should be overarching, high level successes. Try to identify successes at the strategy level rather than the activity level. List a maximum of eight successes.
- For each success, identify what component of the project it is relevant for. If it is about the project as a whole, write “overall”. If it is relevant for a specific strategy, then list the strategy. If it is specific to an activity or several activities, list the activities.
- For each success, identify proof point(s) for each success. This may be a relevant project indicator, findings from an evaluation, based on staff experience, or from other data or learning activities.
 - If the project does not have current proof points, then you should consider documenting learning related to this success or reconsider including it in the list of key successes.

Table 14. Key Successes

Key Successes	Relevant Project Component (Overall, Strategy, Activity)	Proof Points (Indicator, Evaluation, Staff Experience, Other Data)

Key Successes	Relevant Project Component (Overall, Strategy, Activity)	Proof Points (Indicator, Evaluation, Staff Experience, Other Data)

Main Lessons Learned

Tips for framing lessons learned:

- Lessons learned should consist of a generalized principle that would be useful for other programs.
- Do not write the lesson only as an observation, description or a recommendation that lacks justification. Justify the lesson with proof of why it is valid.
- Explain the lesson in the context of the project. For it to be useful to others in future programming, they need to understand the situation in which it occurred to know if it might be appropriate or useful for them.

Use the table template below to—

- List each main lesson learned (use one row per lesson learned), which should be a generalized principle. List a maximum of eight lessons learned.
- For each lesson learned, identify what component of the project it is relevant for. If it is about the project as a whole, write “overall”. If it is relevant for a specific strategy, then list the strategy. If it is specific for an activity or several activities, list the activities.
- For each lesson learned, identify proof point(s) for how we know this lesson learned is true. This may be shown by a project success through a project indicator, findings from an evaluation, based on staff experience, or from other data or learning activities.
 - If the project does not have current proof points, then you should consider documenting learning related to this lesson learned or reconsider including it in the list.

Table 15. Lessons Learned

Main Lessons Learned	Relevant Project Component	Proof Points

Recommendations

Tips for framing recommendations:

- Specify the action that future programs should take.
- Identify who should take that action (e.g., implementing partners, USAID Missions, government stakeholders).
- Say why they should take that action or the purpose of it (e.g., to improve communication, to make implementation more efficient).

Use the table template below to—

- List each recommendation (use one row per recommendation). List a maximum of eight recommendations.

Table 16. Recommendations

Recommendations

Table 17. End of Project CLA Action Plan

End of Project CLA Planning					
Planning reflection questions: <ul style="list-style-type: none"> • Data collection/learning documentation—What topic(s) do you want to collect data or learning about? Identify no more than three. • Methods—What methods will you use to collect this data? “Light touch” options include pause and reflect or after-action review meetings, key informant or staff interviews, focus group discussions, or online feedback surveys. • Timeline—When is it feasible to implement? How long will it take? • Person responsible—Who can take ownership for planning and implementation? • Resources—What resources, including budget or staff time, are needed? • Next steps—What needs to happen next to complete planning for this? What support do you need? How can your MEL or CLA point of contact support planning? 					
Data Collection/Learning Documentation	Goal	Timeline	Person Responsible	Resources Needed	Next Steps
1.					
2.					
3.					

Annex 2. USAID Advancing Nutrition's Collaborating, Learning, and Adapting Plan

Introduction

USAID Advancing Nutrition's Collaborating, Learning, and Adapting Plan outlines our project's intentional and systematic approach to incorporating CLA principles in how we function as a project as well as in our activities. This plan is critical for our team's success, given the large number of stakeholders involved, scope of our project, and ongoing critical gaps in the nutrition evidence base. The plan aims to enable our team to generate better development results by 1) improving our project's organizational effectiveness and 2) engaging in deliberate learning to support USAID, including USAID Mission priorities.

This plan presents an operational strategy for the activities that we will conduct. In addition, we briefly outline how we will approach CLA engagement on Mission scopes of work, which responds to on-the-ground needs and connects to our overall project. Finally, we outline activities we will conduct to encourage our team to internalize CLA principles. While we present a range of activities aimed at different objectives, it is important to note that all activities are interconnected and build on each other to create a project culture in CLA. To this end, we will treat the CLA plan as a living document that we will adapt regularly based on activities that we find valuable.

USAID's Approach to More Effective Program Design and Implementation

Because development programs operate in complex and dynamic systems, donors and implementing organizations are increasingly seeking to create programs that are collaboratively designed and adaptable. CLA is USAID's approach to becoming a more effective development organization as it can: 1) reduce duplication and siloing, 2) base programs in evidence, and 3) support adaptive course correction (Learning Lab 2019). In fact, USAID's Bureau for Policy, Planning, and Learning-commissioned literature review found that a well-resourced and intentional approach to CLA can help contribute to improving organizational performance and development outcomes (LEARN 2017).

While collaborating, learning, and adapting are familiar concepts, what is new is including CLA principles at the beginning of project design and implementation so that CLA activities support project efforts to achieve intended outcomes.

USAID Advancing Nutrition's CLA Plan: Purpose

The CLA plan is critical for USAID Advancing Nutrition's activities for several reasons:

- The project aims to work with a large group of stakeholders that has important perspectives and skills. The USAID Advancing Nutrition team alone comprises the experience, skills, and geographic coverage of 10 partners. We also have the opportunity to engage with USAID colleagues and implementing partners from the Bureau for Global Health (GH), Bureau for Humanitarian Assistance (BHA), Bureau for Resilience and Food Security (RFS), and the Center for Children in Adversity (CeCA), as well as USAID Mission staff and the global nutrition community, where relevant.
- The project includes a range of activities in support of [USAID's Multi-Sectoral Nutrition Strategy](#). Ongoing critical gaps in the nutrition evidence base and deficiencies in cross-sectoral understanding require an intensified effort to translate evidence into action in a manner accessible to all stakeholders.

For these reasons, USAID Advancing Nutrition’s CLA Plan aims to integrate CLA principles into project activities to—

- improve USAID Advancing Nutrition’s organizational effectiveness
- engage in deliberate learning to support technical teams, USAID Washington and Missions, and the project as a whole.

Although listed separately, these goals are interconnected and will contribute to a CLA culture in the project. The first aims to ensure that we consider CLA principles in the internal operations of the project; the second is focused on the project’s technical activities so that staff are engaging the right stakeholders at the right times; using learning as a key modality in our work; valuing all forms of knowledge including tacit, experiential, and contextual; and identifying moments of course correction when possible. The CLA plan is a living document that we will update per the evolving needs of the project. All USAID Advancing Nutrition staff will be trained on the CLA approach.

USAID Advancing Nutrition’s CLA Plan: Implementation

Figure 7 outlines USAID’s approach to CLA (detail provided in Brief Description of USAID’s Approach to CLA below). The headers on the left show how CLA can be incorporated in an activity, while the headers on the right outline the conditions needed for effective CLA application. Note that you don’t need to include all components of the CLA cycle in any given activity, and that some components may be better suited than others, depending on the context.

Our CLA plan will use this framework to apply various components and subcomponents of the CLA approach in activities taking place at two levels:

1. **Project:** This means the USAID Advancing Nutrition project. This level includes processes and activities that are relevant for all project staff and technical teams (Nutrition and Health Systems; Food Systems; Nutrition and Food Security in the Humanitarian Transition; Social and Behavior Change³; Knowledge Management; Monitoring, Evaluation, and Learning; and Finance and Operations).
2. **Activity:** This refers to the many technical workstreams of USAID Advancing Nutrition in support of the overall goals of USAID and USAID Missions.

In the following sections, we start by briefly describing the above-mentioned two goals of the CLA plan outlining: a) the goal, b) the plan to achieve the goal, and c) how we will execute the plan. Next, we separately outline how the USAID Advancing Nutrition CLA Plan will intersect with Mission-supported activities through country programs. Finally, we outline the project activities to create an “enabling environment” for effective CLA application. In Activities/Deliverables for PY2 Proposed Under CLA Plan below, we provide a summary of the described activities, noting when we expect them to commence and who will be responsible.

Improve USAID Advancing Nutrition’s Organizational Effectiveness

This goal will allow us to implement high-quality activities and deliver high-quality outputs. To this end, the CLA plan will encourage project staff to consider CLA principles in our structure and processes, described below.

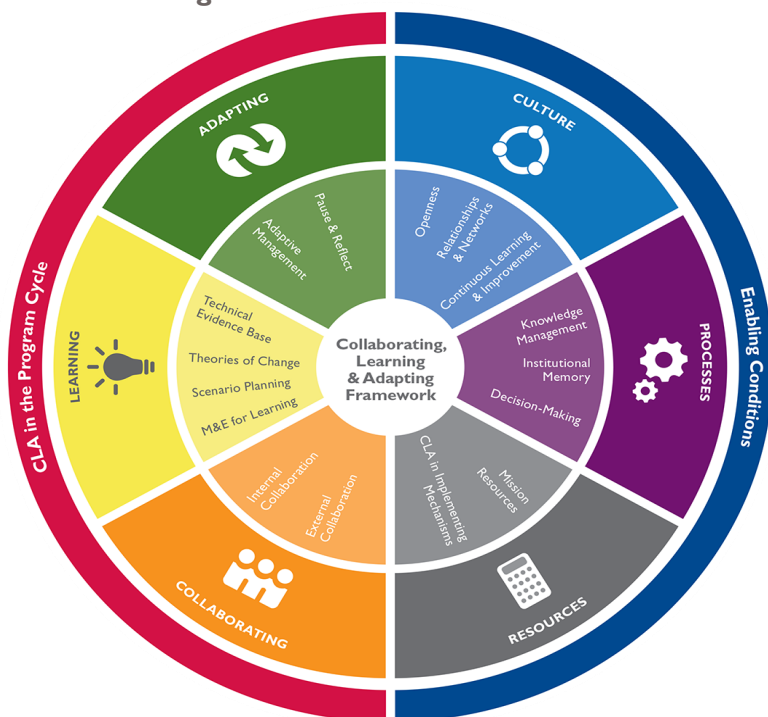
³ During the project, these two teams later renamed themselves as Nutrition in Humanitarian Contexts and Social and Behavior Change and Gender. We later added two additional teams: Capacity Strengthening and Early Childhood Development.

Collaboration: As USAID’s flagship multi-sectoral nutrition project, cross-team collaboration will be critical at both the project and activity levels. At the project level, we have staff who belong to multiple teams that share information across teams and bring different perspectives to issues.

Beginning in Year 2, our work planning will ensure that crosscutting teams, such as the Monitoring, Evaluation, and Learning and Knowledge Management teams, are engaging with different technical teams to ensure their LOE is considered and budgeted for. In addition, we are already collaborating with three critical stakeholder groups—

- USAID Bureaus with which the project teams have biweekly/triweekly meetings
- consortium partners who are represented in a partner advisory group that meets periodically to advise on the overall project direction
- external actors on an as-needed basis (e.g., meeting with other USAID-funded projects to complement each other’s work, liaising with key global nutrition stakeholders, and attending key conferences).

Figure 7. USAID CLA Framework



USAID Learning Lab n.d.

At the activity level, technical teams have identified and are engaging with key communities of practice/working groups in their respective areas to facilitate information sharing and coordinate overlapping activities and mandates (see box 6).

Learning and adapting: At the overall project level, we will identify time points within the USAID Advancing Nutrition annual planning and implementation cycle where it will be critical to conduct learning activities that convene staff to capture tacit knowledge in support of adaptive management decisions.

A key time point will be the project’s annual work planning process. This will be preceded by an overall project annual review meeting to discuss if the project is on track and major achievements, challenges, and lessons. Prior to this meeting, we will encourage technical teams to conduct a similar exercise so that relevant lessons can be integrated at the project level. We also plan to leverage our project’s online monitoring systems so that

Box 6. Examples of Collaborative Activities

Our project staff have been participating in the following communities of practice and/or working groups (selective list):

- Nutrition and Health subgroup of the Child Health Task Force
- Nutrition Financing Community of Practice
- Nutrition Modelling Consortium
- Multi-sectoral nutrition working groups such as Agriculture-Nutrition Community of Practice, Breastfeeding Collective, UNICEF Infant and Young Child Feeding Working Group, Iodine Global Network

in addition to output and outcome indicators, we collect context-specific indicators to inform project activity decisions, especially at the country level. The identification of challenges and lessons will help provide recommendations for the following year’s annual work planning process.

In addition to work planning (see box 7), we will conduct at least two learning activities at the project and/or technical team levels that are expected to benefit from adaptive management. Internal team systems and/or processes for which USAID Advancing Nutrition project staff have requested pause and reflect moments to help teams determine what is working and what needs to be adjusted (Learning Lab 2018) include—

- cross-team collaboration in activities
- use of knowledge management systems and processes
- approach to engaging with Missions
- application of various project-wide strategies.

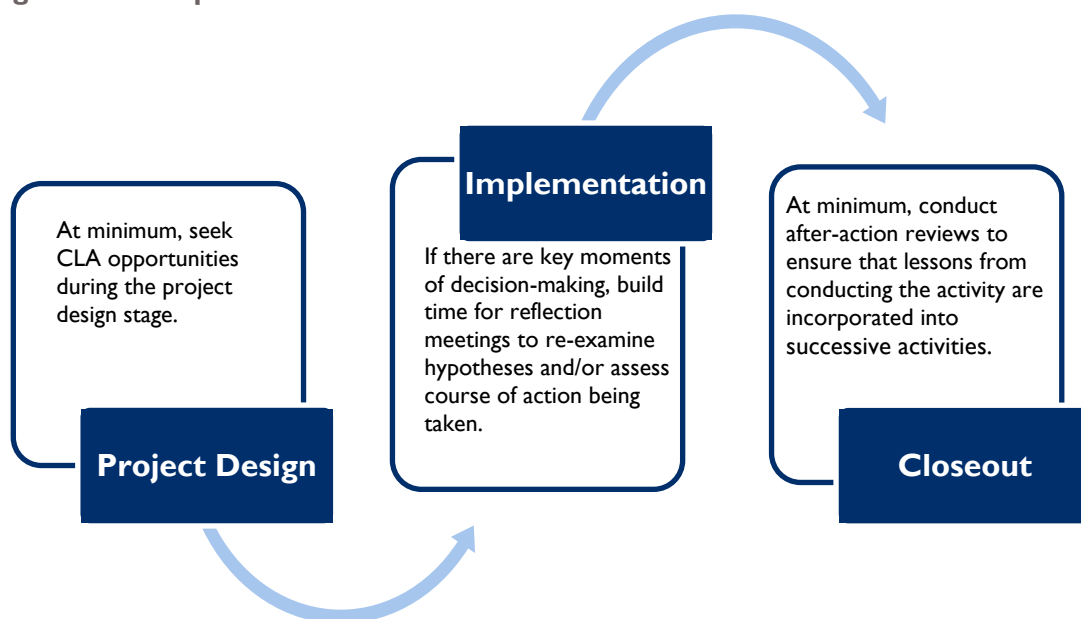
At the activity level, we will deploy a project-standard CLA questionnaire/guideline that the MEL and technical teams will create and that will ask about CLA during an activity’s cycle. As an example (see figure 8), we will outline key questions and/or CLA tools for consideration as leads design activities. We will encourage activity leads to refer to this document during the work planning process to consider the application of CLA principles in the design and implementation of their activities and identify work streams that may benefit from a deeper CLA engagement. We will encourage activity leads to note and budget for CLA-specific activities in their implementation plan, where relevant.

With support from the project’s management, the MEL team will execute the activities outlined at the overall project level. Since these activities are internal to the project, we will summarize lessons in PowerPoint slides or two-page Word documents, and note adaptations made in the project’s quarterly reports. The MEL and technical teams will create a CLA questionnaire/guideline.

Box 7. Project Year 1 Learning Activity

The MEL team conducted a “pause and reflect” activity to extract lessons learned from the PY1 work planning effort to improve PY2 work planning and to show CLA in action. Between May and June 2019, we conducted an all-staff survey followed by more than 10 focus group discussions and interviews with the USAID core management team. Several recommendations stemming from this exercise, such as the appointment of a work planning coordinator, a staff retreat, and an earlier start to the work planning process, were incorporated in PY2.

Figure 8. Example of CLA Process



Engage in Deliberate Learning to Support Technical Teams and the Project as a Whole

This will ensure that our project is engaging in deliberate multi-sectoral nutrition learning activities that may inform our activities over the life of the project and contribute to the global evidence base. By deliberate learning, we mean identifying learning questions during the design-stage so that our learning activities are well-thought-out and adequately resourced. This will also allow the project to ensure that learnings stemming from the project connect to the learning agendas of the funding bureaus. Next, we briefly describe how the project will explore and implement deliberate learning activities.

Deliberate learning opportunities will take place at the activity level and may arise opportunistically during the work planning discussions when we use the project-standard CLA questionnaire/guideline, or strategically through the identification of key areas of learning for the technical teams and/or the project as a whole. Our project's technical teams may prioritize these opportunities, keeping in mind criteria such as whether the proposed—

- learning question has been identified in the learning agenda and is considered a priority by GH, RFS, BHA, and/or CeCA
- learning question will contribute to the gaps in the evidence base for USAID Advancing Nutrition's flagship areas
- method to answer the learning question is feasible (i.e., resources are available)
- learning activity allows for adaptation within the project cycle.

Once the technical teams have identified the learning opportunity, we will encourage them to identify one or two learning questions (see box 8) associated with the activity. Based on the question(s), we will encourage technical leads to identify stakeholders who should be engaged in the learning activity to provide inputs and/or who will benefit from the lessons. We will also help technical leads determine if there are key moments in their activity that may allow for adaptive decision-making. Examples include conducting rapid experimentation to test multiple modalities of delivering a program in the case of implementation activities and using monitoring data to tweak project activities.

Box 8. Example of a Learning Question

While a research question explores causation and/or correlation, a learning question is mostly geared toward answering “what” and “how,” which can be answered through a combination of methods. For instance, an example of a learning question could be “What are some strategies to facilitate joint action to reduce acute malnutrition?” which could be answered through a combination of methods such as literature review, cases studies, and key stakeholder interviews that help capture the tacit knowledge of implementers on the ground. Technical teams may prioritize this learning question since it would inform the USAID learning agenda on strategic integration. The lessons from this activity may be applicable to the other three funding bureaus facing similar challenges in coordination and/or collaboration in different contexts.

Since not all learning can be used in time for adapting program design or implementation, we will place equal importance on documenting lessons that will be shared with relevant audiences using our project’s knowledge management systems. We will encourage teams to share lessons and reflections through blogs and journal publications that encourage field reflection and case studies.

In case the proposed learning activities intersect with the learning questions and/or priorities of the funding bureaus, we will ensure proper documentation of knowledge and share it with MEL counterparts from the bureaus. We will develop a tracker that will track activities to encourage CLA application and project learning and research activities. We have summarized these steps below in figure 9.

Throughout the above-mentioned process, we expect that the technical teams will work with the MEL team to refine learning questions and guide activities and deliverables that generate practical learning.

Figure 9. Steps to Execute a Learning Activity



CLA Application in Country Activities

We will use the above approach for CLA engagement on Mission scopes of work received by our project so that all project staff, whether based in Arlington or in countries, consider CLA principles in their activities. However, the type of CLA engagement will depend on the needs expressed by Missions:

- At minimum, we will encourage country staff to consult the CLA questionnaire/guideline that will be developed for the overall project.
- Depending on interest and/or engagement from Missions, we will be ready to develop CLA plans specific for a given activity or a series of activities, which will likely be the case when we have a country presence. This CLA assistance could be directly to Missions, national programs, or other implementing partners, depending on Mission priorities and other contextual factors.

While it will be important for our country-level work to connect to our project’s overall CLA plan, it will be equally important for our project’s CLA plan to be informed by country activities (see box 9). In particular, the lessons at a country level may be relevant to key stakeholders in other countries. For this reason, we will be keeping track of the learning activities at the country level using the CLA tracker so that we can share lessons across a range of countries through a webinar series or during regional meetings. The latter will allow key stakeholders, whether implementers or Mission staff, to discuss their reflections. For the activities mentioned above, our project’s MEL team will work closely with the country teams and/or relevant technical teams to scope and support implementation of identified CLA activities.

Box 9. Example of Learning and Adaptation in Action

A proposed activity could aim to design an intervention to increase consumer demand of nutritious foods in rural Kenya. A literature review and formative research could inform this activity and would help generate hypotheses about the best ways to connect with consumers and messages that will resonate with them. The project team could conduct small experiments with feedback loops to test various mechanisms to connect with consumers (i.e., through their social networks, local markets, and/or cell phones) so that the learnings from these experiments can help refine the proposed intervention’s design.

Enabling Conditions to Support Effective CLA Application

Following the framework outlined in figure 7, our project will include activities to create an “enabling environment” for effective CLA application. This will include ensuring that there is a team culture championing CLA principles, processes set up to support CLA activities, and adequate resources budgeted. Keeping in mind existing systems, processes, and needs of our team, we will conduct the following activities.

Team culture: To support a team culture championing CLA principles, our project has already or will include—

1. Team meetings that will bring all the project staff from different technical teams together for reflection. Currently, the project has biweekly staff meetings, biweekly meetings between various USAID and USAID Advancing Nutrition technical teams, quarterly portfolio reviews, and annual team work planning meetings.
2. Development of team norms encourages a collegial and safe space for team members to collaborate and learn together.
3. Regular performance check-ins with managers to encourage a culture of constructive feedback.
4. Team-building activities like retreats and monthly potlucks encourage openness and relationship-building among team members.
5. Brown bag meetings where external stakeholders are invited facilitate knowledge exchanges and learning.

Team processes: For effective application of CLA principles, it will be important to ensure that our project’s existing systems and processes also consider these principles. For this reason, the project has ensured or will ensure that—

1. hiring policies include CLA principles such as openness to feedback, willingness to adapt, and effective collaboration skills
2. employee exit processes include interviews with targeted CLA questions on culture, management, and overall project effectiveness

3. the inclusion of CLA trainings in onboarding sessions benefits existing staff and periodic sharing of CLA relevant resources encourages and influences thinking about staffing
4. knowledge management platforms such as Google, Zoom, the intranet, and listservs facilitate internal team information sharing, collaboration, and/or co-creation. We will also encourage team members to participate in monthly or quarterly internal learning lunches.

Resources: For effective execution of the CLA plan, ensure that adequate resources are budgeted. Our project has already appointed a learning advisor who will be supported by the MEL director and is a member of the project’s overall management team. In addition, we will create a group of USAID Advancing Nutrition CLA champions that will include representatives from various technical teams, Human Resources, Finance and Operations, and Knowledge Management. Our CLA champions will engage in free flow of information and encourage their peers to integrate CLA principles in project activities. During the work planning process, we will identify and budget for activities that may benefit from a deeper engagement of CLA principles.

As the project evolves and project staff become comfortable with the CLA approach, we will consider additional tools and processes to strengthen this enabling environment.

Roles and Responsibilities

Each member of our project staff has an important role in either leading or participating in our project’s CLA activities:

- The project management team will set clear expectations of staff and the project as a whole to ensure that the integration of CLA into relevant activities is prioritized.
- Activity leads will help ensure that CLA principles are considered and included in the implementation plan of activities.
- The MEL team’s systems and processes will provide the data and evidence for continuous learning and improvement. The learning advisor, under the guidance of the MEL director, will support and advise the various technical and operational teams on the application of CLA principles.
- The Knowledge Management team also plays a critical role because high-quality knowledge management tools and practices are critical for effective CLA application. It is important to create systems that facilitate collaboration, ensure that lessons are documented, and develop learning products for dissemination and future use.

Assessment of USAID Advancing Nutrition’s CLA Progress

The project will create a CLA tracker (anticipated as a key deliverable in PY2) and will assess how the team is applying CLA principles and will update the plan in response to recommendations provided. This process will occur before the annual work planning process so that identified recommendations are adequately resourced. In this way, the project will stay true to CLA principles and treat the CLA plan as a living document.

Brief Description of USAID’s Approach to CLA

USAID’s CLA framework includes two key components—CLA in the program cycle and enabling conditions. The following excerpt from the blog, “[Exploring the CLA Framework](#),” by Hinthorne, Salib, and Ziegler (2015), describes the components and sub-components of this framework.

CLA in the Program Cycle

Collaborating: When we talk about collaboration, what we really want to know is whether we are working with the right people at the right time for the right reason. Are we being deliberate and intentional about which partners we are engaging, and how?

Learning: A commitment to continuous improvement must be grounded by broad contextual awareness as well as a deep understanding of the questions that matter most, but it would be unreasonable to try to keep on top of every new development relevant to a local context or technical sector. Creating a learning agenda is one way to decide on priority questions and consider how monitoring, evaluation, and other types of analysis can help answer those questions.

Adapting: One approach to determining what to do with new learning is to deliberately take time out to pause and reflect. This can happen in a number of ways, and who participates will depend on what we are trying to achieve, but it helps to consider how the activity advances our learning agenda and when we need to surface lessons, so they can feed into design and implementation schedules.

Enabling Conditions Needed to Have an Effective CLA Plan

Culture: To create the space for and get the most out of collaboration, there needs to be a culture that supports it. A culture that values openness, relationship building, and continuous learning will be more likely to create opportunities for collaboration and continuous improvement through adaptive management.

Processes: The question then becomes, once we have learned something, what do we do with it? What processes are in place to make sure we go from documenting our knowledge to actually acting upon it? Having clearly articulated processes for things like decision-making can help.

Resources: CLA takes resources, including financial resources for things like space, travel, and probably most importantly, staff time. It also requires having staff and consultants with the skills necessary to help the team collaborate intentionally, learn systematically, and manage adaptively.

Activities/Deliverables for PY2 Proposed under CLA Plan

Table 18. Activities/Deliverables for PY2 Proposed under CLA Plan

CLA Plan Deliverables	Responsible/Lead Team	Projected Timeline
Improve USAID Advancing Nutrition's Organizational Effectiveness		
PowerPoint slides that summarize lessons and adaptations made from pause and reflect exercise prior to annual work planning	MEL team with support from USAID Advancing Nutrition management	PY2 Q4
PowerPoint slides that summarize findings from learning activity I (exact activity to be determined [TBD])	Learning advisor with respective team	PY2 Q2
PowerPoint slides that summarize findings from learning activity II (exact activity TBD)	Learning advisor with respective team	PY2 Q3
CLA questionnaire/guidance note	Learning advisor and technical teams	PY2 Q1
CLA Application in USAID Mission Activities		
Promotional materials on CLA targeted for Missions	MEL team	TBD

CLA Plan Deliverables	Responsible/Lead Team	Projected Timeline
Mission-level CLA Plan	Learning advisor with support from MEL team	TBD
Enabling Environment to Support CLA Application		
Culture		
Document outlining team norms	Human Resources team	TBD
Team-building activities	USAID Advancing Nutrition project team	Ongoing
Presentations from internal brown bags	Knowledge Management team	Ongoing
Processes		
Project-wide CLA training	MEL team	PY2 Q2
Resources		
Formation of CLA champions group	USAID Advancing Nutrition project team	PY2 Q1

References

Hinthorn, Lauren Leigh, Salib, Monalis, and Jessica Ziegler. 2015. “Exploring the CLA Framework.” *USAID Learning Lab*. Accessed August 19, 2019. <https://usaidlearninglab.org/lab-notes/exploring-cla-framework>

LEARN. 2017. “What Difference Does CLA Make to Development? Key Findings from a Recent Literature Review.” *USAID Learning Lab*. Accessed August 19, 2019. https://usaidlearninglab.org/sites/default/files/resource/files/eb4cla_litreview_briefer_rev0519.pdf

Learning Lab. 2018. “Facilitating Pause and Reflect.” Accessed August 19, 2019. https://usaidlearninglab.org/sites/default/files/resource/files/cla_toolkit_adaptive_management_facilitating_pause_and_reflect_final_508.pdf

Learning Lab. 2019. “Understanding CLA.” Accessed August 19, 2019. <https://usaidlearninglab.org/qrg/understanding-cla-0>

Learning Lab. n.d. “Collaborating, Learning, and Adapting Framework & Key Concepts.” Accessed July 22, 2023. https://usaidlearninglab.org/sites/default/files/resource/files/keyconcepts_twopager_8.5x11_v7_20160907.pdf.



USAID
FROM THE AMERICAN PEOPLE

USAID ADVANCING NUTRITION

Implemented by:
JSI Research & Training Institute, Inc.
2733 Crystal Drive
4th Floor
Arlington, VA 22202

Phone: 703-528-7474
Email: info@advancingnutrition.org
Web: advancingnutrition.org

September 2023

USAID Advancing Nutrition is the Agency's flagship multi-sectoral nutrition project, addressing the root causes of malnutrition to save lives and enhance long-term health and development.

This report is made possible by the generous support of the American people through the U.S. Agency for International Development. It was prepared under the terms of contract 7200AA18C00070 awarded to JSI Research & Training Institute, Inc. The contents are the responsibility of JSI and do not necessarily reflect the views of USAID or the U.S. Government.