

Monitoring and Evaluating Learning Networks

Rick James, March 2010

Do learning networks really make any difference? Do people ever apply what they have learnt? And how does this help the poorest people we are trying to assist? Learning networks should not fear or dodge such challenging questions. Taking them seriously throughout the life of a learning group can help ensure it remains relevant and effective. There are relatively simple, 'good enough' ways to monitor and evaluate. What is needed is the courage and commitment to make it happen.

Learning networks operate under a variety of names: communities of practice; e-learning networks; web-discussion fora, learning communities, thematic groups... Whatever name they go by, they tend to be groups of practitioners who share a common interest in a specific area of competence and are willing to share their experience. Learning networks are currently one of the most popular capacity building methods. Rumizen articulates the opinion of many when she says: 'Over the past few years communities of practice have come to be seen as the killer application for knowledge management. And rightfully so.' (2002:85).

But while investment is increasing, most learning networks are yet not in a position to provide answers to questions of impact. At the most basic level potential participants and their managers ask 'are the benefits of involvement worth the time costs involved?' Others wonder whether it is worth them starting and facilitating such groups. Those providing the finance will want to know whether it was worth their investment. Yet, according to key researchers: 'Monitoring and evaluation (M&E) practice falls far short of what is required to assess the learning impacts of a network' (Guijt 2002). But if learning networks do not start providing any evidence of change, the current enthusiasm and support may quickly dry up. In the absence of this critical information, people will simply assume that learning networks do not make much of a difference.

This short paper provides some pragmatic ideas about what we need to assess and how this can be done in relatively simple and cost-effective ways. Generating useful information about the impact of a learning network is not as impossible as it might first appear. With considered planning and sensible methods, it is possible to generate reasonably good data, certainly good enough to indicate a positive contribution to development.

Popularity of learning networks

It seems that all organisations, whether businesses, public sector or NGOs are being asked to deliver more, and with few resources. An important way in which corporate companies have addressed this challenge is by investing in learning networks to share know-how or practical expertise¹. BP, for example, has more than 250 such 'communities of practice' within their organisation (Collinson and Parcell 2004). International businesses, in particular, see internal communities of practice as vital in achieving excellence across the world. NGOs are beginning to catch on, with organisations such as World Vision investing heavily in such processes.

Advances in technology have given real impetus to opportunities for sharing learning amongst practitioners, especially given the high cost of air travel and face-to-face meetings. These advances have encouraged 'South-South learning'.

What do these learning groups look like?

There are many different types of learning groups, some simply communities of interest (such as sharing a hobby); others a work-based community of practice (developing and applying a practice together); others a community of commitment (taking mutual responsibility for delivery of a project). While businesses and some larger NGOs have focused on developing learning networks within their own organisation, many others are part of learning networks across a number of different organisations. These are more complex, geographically and organisationally distributed learning networks.

In writing this paper I have drawn on my experience in different roles with three different learning groups, all distributed across different organisations and with members dispersed across many different countries:

| | HIV Workplace Learning Group (INTRAC) | Churches and Organisation Development (SMC) | Competence Sharing Network Project (PYM) |
|-----------------------------------|--|--|--|
| Number of members | 50 | 120 | 35 |
| Main methods for sharing learning | <ol style="list-style-type: none"> 1. Member research and writing 2. Bi-annual face-to-face meetings 3. E-bulletins | <ol style="list-style-type: none"> 1. Monthly e-bulletins with members' case studies 2. Web-based learning forum 3. Face-to-face meetings planned | <ol style="list-style-type: none"> 1. Annual face-to-face meetings 2. Visits between members |
| My role | Project manager | Facilitator | Evaluator |

¹ In 1988, when Japanese competition was threatening to put the Chrysler Corporation out of business, the resurgence depended in part on the creation of an innovative knowledge system based on communities of practice (Rumizen 2002).

Whichever activities are selected as being most appropriate to the particular network, all face the challenge of how to monitor and evaluate their performance given the limited literature and a dearth of practical experience in the subject.

The challenge of measuring impact

As the leading author on learning networks, Etienne Wenger, writes:

‘Many have argued that knowledge resources can’t be measured or managed. And given what we know about knowledge – that it is tacit, dynamic, socially distributed and realized through human acts – they’re partly right’ (2002: 166).

It is notoriously difficult to measure the impact of capacity building, let alone a learning network. How do you meaningfully measure a change in learning? Even when learning is applied and organisational changes become visible, to what extent is this change the product of the learning from the network, or other ideas and opportunities? It is not straightforward to attribute the source of knowledge to one particular activity or influence. It is especially hard with distributed learning groups, where beneficiaries are dispersed and where the learning group usually only takes up a small percentage of a member’s time (and is often not part of their formal job description). There is no obvious control group. There are also issues about who measures, when and how.

Theory of change for learning networks

While Wenger acknowledges the difficulties in measuring and managing knowledge resources, he asserts that you can measure and manage the knowledge system through which knowledge flows and creates value (Wenger 2002). If you are clear about what you want to achieve in capacity building and have a clear understanding of the purpose of M&E, it is not difficult to come up with a sensible blend of tools, methodologies and approaches to meet the needs of different stakeholders (Simister 2010). Simister points out the importance of starting out with an adequate theory of change. This involves being explicit about why the capacity building is being done, what it involves, how change is expected to occur, and how changes at individual or organisational level might contribute to any desired wider changes. This can help with monitoring and evaluation.

A simple linear description of this change process might look like:

| | | | | | | |
|--------------------------|---|---------------------|---|----------------------|---|--------------|
| Part of learning network | ⇒ | Individual learning | ⇒ | Changed organisation | ⇒ | Wider impact |
|--------------------------|---|---------------------|---|----------------------|---|--------------|

A more organic way of conceptualising how learning takes place across a network might be a ripple model. Imagine the activities of the learning group to be like pebbles dropped into a pool of water. Different pebbles will generate different ripples, depending on the shape, size and weight of the pebble and how it is thrown. The effect will ripple outwards, initially bringing change to individuals, then to their organisations as they apply that learning (assuming that a causal link between knowledge and performance exists). This change in performance will hopefully have a further impact on others outside the network.



But all of this takes place within a changing context. It would probably be more accurate to imagine the pebble dropping into a fast-moving river with rocks which block ripples on a windy day. Change is an emergent process. It is limiting to only look for changes in the areas that were planned for.

What M&E information do we need?

Good monitoring and evaluation starts with good planning. This should necessarily involve key stakeholders who have a strong interest in the findings. At the start it is necessary to ask:

- Who needs to know?
- What do they need to know?
- Why do they need to know it?

Key stakeholders might include network participants, their managers, the learning group coordinator, the funder(s). Stakeholders should then come to agreement about which level of ripples will be assessed, when, by whom and with what criteria. For example participants are unlikely to insist on a full-blown external evaluation before deciding to participate. They will make their own quick assessment on the basis of how relevant it appears and how good it looks. Funders, who have their own reporting responsibilities, may need something more comprehensive. Different stakeholders will also be interested in different things: some in learning about good practice; others in learning about what does not work (traps to avoid); others about how well managed were the resources invested...

In many learning networks, the following elements are important to look at:

1. Learning activities (what done, frequency, quality, relevance, costs)
2. Members' engagement in activities (use of services)
3. Learning outputs (knowledge generated)
4. Learning outcomes and impact (the learning group objectives)
5. Relationships developed between members
6. Learning for others outside the group

The first three elements can be seen as inner ripples which should be continually monitored. The second three are outer ripples and are more appropriate to analyse during periodic evaluations.

1. Learning activities

The most obvious and easiest element to analyse is the quantity and quality of the learning activities undertaken. The workshops, communications (e-bulletins, letters), applied research/action learning projects, and web discussions can all be examined. We need to ask questions about:

- What was done? How often? How does this compare to what was planned?
- How relevant were the topics to the work of the members? How well did it meet the needs of the group?
- What was the perceived quality of the activities?
- How much did it cost?

For example, with the HIV learning group, it was straightforward to compare the number of activities with the number planned. In Year 1:

| Activities | Numbers planned | Numbers achieved |
|-----------------|---|---|
| Action research | 2 country studies 1 Praxis Synthesis Paper | 3 country studies 1 Praxis Paper published |
| Action learning | 4 Praxis Notes | 8 Praxis Notes published |

In the evaluation of the CSNP learning group, members went further and rated the network's activities in terms of relevance and level of satisfaction with the quality. An emailed survey measured perceived satisfaction and found the figures compared favourably with the target indicators in the proposal.

| | Extremely or very | Reasonably | Not really |
|-----------|-------------------|------------|------------|
| Relevance | 88% | 12% | 0% |
| Quality | 73% | 27% | 0% |

It is not difficult to measure the quantity and assess the quality of the activities undertaken by any learning group. Interlinked with any analysis of the activities will be some assessment of the management of the project. The leadership, coordination, and management may have a significant influence on the activities and the overall performance of the learning network.

2. Members' engagement in activities

In assessing learning networks it is also important to look at:

1. The extent of membership
2. The level of engagement of members

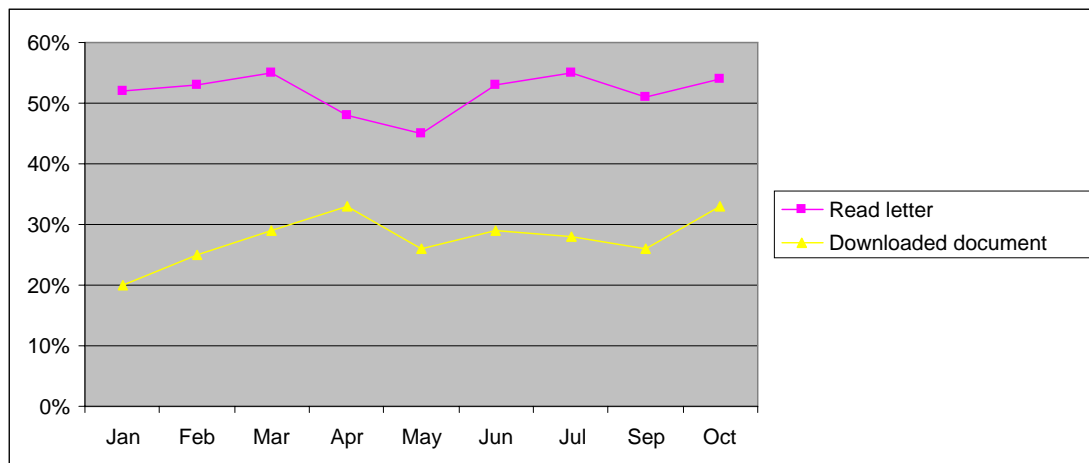
The extent of membership can be measured purely on numbers of people signed up, on nationality and location. For example the HIV learning group regularly measures the number of members and their country of origin against specific targets set in the original proposal. The CSNP also tracks the gender balance of its membership to see if it is reaching its target of having at least 50% female members.

Clearly activity alone, even complemented by the numbers of network members, is not enough. It is vital to also look at the use of these learning services – the level or depth of engagement. In a learning network it is worth considering:

- participation rates (the numbers of 'signed up' and also 'active' participants)

- the level of activity (such as reading emails + responding to emails + number of online discussion threads + numbers undertaking learning activities + downloads)
- the extent of member ownership of the learning network

Using software for sending out large mailings by email (such as Maildirect or ConstantContact) often allows the sender to analyse how many of the messages are read and, if links included, how many people have downloaded the embedded documents. These numbers give an indication of the levels of engagement by members and can be regularly analysed to highlight any trends. For example in the learning group on OD and churches monthly letters are emailed to more than 100 learning group members – the graph below tracks members’ engagement:



Similarly with web-based learning fora such as Ning the number of visitors to the learning site, the time they spend, the pages they open, and their contributions to discussions can all be assessed regularly using tools like Google Analytics.

3. Learning outputs

Learning groups can often generate new knowledge or document existing knowledge for the first time. It is important to look at any specific outputs of the group, both in terms of the number of documents produced and the quality of those documents. This ‘knowledge generated’ may be more about highlighting different practitioners’ perspectives and individual learning from experience, rather than assuming it is equivalent to scientifically proven objective fact. So for example, in an evaluation of an INTRAC ‘Praxis’ project involving a number of learning groups, the evaluators not only counted the numbers of documents produced, but also set up a system to assess the quality of the outputs, as described in the box below:

Praxis – quality of Praxis Papers

Three reviewers (from Uganda, India and the UK) who had not been involved in Praxis up to that point were asked by the evaluators to review a selection of Praxis products. They were given a selection of 10 Praxis Notes and 6 Praxis Papers, chosen to reflect a cross section of topics and popularity in terms of downloads. They were asked to score (on a range of 1-5) the papers in six categories:

- Title
- New Ideas (how innovative?)
- Structure and Argument
- Evidence Based
- Readable and Accessible
- Practical Relevance

The reviewers were also asked to comment on each category, and to give their views on how the documents could be used, and could have been improved.

4. Learning outcomes and impact

Ultimately what really matters with any learning group is whether:

1. the network has enabled members to learn as individuals
2. members have applied this learning to their work
3. this has made a difference to beneficiaries (clients)

This is where the M&E becomes more complex. It is important to distinguish between changes that can be measured, and changes that can only be illustrated. Developing plausible links between measurable changes and wider goals may help enable M&E to be more realistic and less onerous in terms of time and resources.

At a simple level, it is possible to come up with quantitative figures to measure the learning which members attribute to the network. For example for the CSPN evaluation, the survey asked respondents to state the extent to which being part of the network had increased their capacity to run a project. The questionnaire found:

Increased capacity from CSNP?

- 70% said network had increased capacity to run project a lot or considerably
- 30% reasonably
- 0% not really made a difference

You can go much further with quantification, though the findings become increasingly qualified and tenuous as you do. For example, in order to 'make the business case' for a learning network, some calculate the Return on Investment, using the formula:

Benefit = Numeric benefit of learning X contribution from learning network X degree of certainty

So for example, if an NGO attributes a \$100,000 fundraising success to the learning network, you could multiply the size of the grant by the perceived percentage contribution from the learning network (60%) by the respondent's degree of certainty about this (75%). In this case the learning network would have generated a return of

$\$100,000 \times 60\% \times 75\% = \$45,000$. Clearly such figures can only ever be subjective estimates and so need to be used with some care.

While looking for numbers, it is vital to ensure that some of the less tangible benefits are not missed. With individual learning, knowledge or skills may only be a part of the benefit. Sometimes the changes are more in attitude. For example the evaluation of the CSPN network found that members and outside observers felt that there had been a major shift in participants' confidence. One respondent said: 'We are now more open and less threatened by our weaknesses.' Another stated: 'I'm more confident in doing my task and more flexible as a result of what I learn in strategic management.' Still another respondent pointed out:

'We did not foresee the increased self confidence before we started, but is something observed in the networks meetings. By celebrating and sharing people's own experiences, members have gained confidence in their own expertise.'

Similarly with the review of the OD and churches learning network, some of the key changes were attitudinal, bringing hope and inspiration to members. As one said: 'I have reconnected with something I wanted to do when I was young. It has enabled me to reconnect with my calling.' And another said: 'It has helped me to be more open about my own struggles with OD and churches'.

So, a good assessment of the difference that a learning network has made often also requires a narrative approach. Answering questions such as 'How has this learning been applied back in the workplace? How has this helped make a difference to programmes?' requires qualitative information. As Guijt states: 'If assessing the impact in terms of "changed practice of network members" then this will require sampled case studies to know how practice has changed as a result of engagement with learning mediated through the network' (2002:25). Wenger says that static measures such as participation rates or documents produced only become useful in the context of stories that explain the causal links between them (2002). 'Stories are the best way to traverse the knowledge system in a way that explains the links between community activities, knowledge resources and performance outcomes' (ibid: 167). There is a need to incorporate implicit contextual factors that may be crucial to appreciate, but hard to codify or generalise.

But it is not just about collecting one-off narratives. As well as encouraging 'demonstrating causality through stories', Wenger emphasises a second principle of 'ensuring systematicity through rigorous documentation' (2002). He says by producing enough stories of change, you can arrive at compelling 'systematic anecdotal evidence'. This avoids the charge that one-off case studies are not representative.

These stories need to be elicited from members of the learning networks. One IT firm offers annual prizes to the best 'stories of change'. It is even better when these stories emerge unsolicited. For example one member of the OD and churches learning network spontaneously wrote:

The document you wrote on "Working with Churches" that was mentioned in a letter has been an incredibly helpful resource for us these past few months. I have all our staff and board working through it. We work with local church congregations in Cape Town helping them respond to the poverty around them in this city. Your research and thoughts have really helped us frame a few things we have been wrestling with. One consequence is that we're

putting together a team of church relationship facilitators, largely from within our current staff, freeing them to focus on working with the church leadership in the way envisioned in your document. I just wanted to say thank you for making it available.

If such feedback is written, it can be filed electronically or physically in some form of 'feedback folder'. But when these stories are told verbally, there needs to be a way of capturing, documenting and storing these examples so that evidence is not lost.

5. Relationships developed between members

Changed relationships between members can be another indirect impact of learning networks. For example, the evaluation of the CSNP found:

The network has also changed relationships between members. A sense of 'sisterhood' and solidarity is developing. As one respondent said: 'The network makes us one. In the past we have been implementing projects separately'. Now there is a sense of community and trust. People are now able to look for help from each other: As one respondent put it: 'Whenever I find a question in my work I know there are people I can talk to. I can ask them, "How do you deal with this situation?"'. This has helped members become less isolated and enclosed. They are more committed to working together.

In the case of the HIV workplace network, it is possible that involvement in this network has enabled members to become better linked with each other, enabling and encouraging their involvement in future programming initiatives.

6. Impact outside the members

The learning generated within a network may not only remain within that network. A network can have an impact outside the direct members as the materials generated are used by people outside the network. For example the documents produced by the 50 members of the HIV learning network have been downloaded by almost 20,000 other people outside of the network – 400 times more than the membership.

| Publication type | Downloads to date |
|-------------------|-------------------|
| HIV Praxis Papers | 6545 |
| HIV Praxis Notes | 11008 |
| HIV ONTRAC 2009 | 2383 |
| Grand total | 19936 |

As well as the content, the method of learning may be passed on too. For example the CSPN has also had an impact by catalysing other networks. One member, inspired by CSNP, has helped initiate another network of 30 NGOs in Kenya working with children. Other members have started a learning network for child development NGOs in Uganda, and an East African Network of Anti-FGM Campaigners.

How do we monitor a learning network?

So if this is what we need to measure, the question is when do we do it? It is a management responsibility to regularly monitor what is happening with the inner ripples. Simple monitoring need to be built into the day-to-day management systems. So for example the OD and churches learning group assesses the level of activity on a monthly basis and has indicators and annual targets to aim for:

OD and Churches monitoring targets

Learning activities

10 newsletters a year, well-received and within budget
Web page up and running and used by 25% of members
2010 workshop event rated as 'highly useful' by 80% participants

Member engagement in activities

Number of participants: 100 members (including 40% women; 50% non-European)
Level of engagement of participants: 40 engaged members (reading emails + downloading)
15 highly active members submitting responses to emails and stories, experiences, taking part in web-discussions

Learning outputs (knowledge generated)

Number of new documents generated: 10 new documents produced each year
Documents rated as at least 4 out of 5 for being 'practical, relevant, readable and accessible' by members

As well as this ongoing monthly monitoring of activities and member engagement with indicative targets, efforts need to be made to capture informal feedback from members. The group coordinator should have a folder (electronic or hard copy) where they file away unsolicited feedback (whether positive or negative).

Some learning groups also have an annual review process to monitor progress. For example, seven members of the OD and churches learning group meet annually to assess how the learning network is progressing. The review meetings are lightly structured around the following simple questions:

- What has happened in the last year/six months?
- What has gone well?
- What difference has it made?
- What did not go so well and needs improving?

How do we evaluate a learning network?

In addition to this regular monitoring there is a need for periodic evaluations of the learning network. Such evaluations should use the monitoring information for the inner ripples, but also look at the other levels too including:

- Quality of learning outputs
- Learning outcomes and impact
- Relationships developed between members
- Learning for others

First, though, it is vital for an evaluation to clarify its aim. Is it to look at accountability for project activities and use of donor/member resources? Or to assess what individual members have learnt; whether this learning has been applied; and what difference this has made? Or is it to make recommendations for improving the functioning of the network in the future? The reality is that evaluations often try to do all three, sometimes with mixed fortunes.

Any evaluation also needs to specify its scope. Measurement is costly and the further out you go along the ripples, the more qualified and perhaps tenuous the findings become, as there are more variables that affect change. It is worth concentrating on information that is essential, not desirable. It is also worth keeping to realistic levels of investment – a typical rule of thumb is between 2-10% of overall budget (Guijt 2002). In an ideal scientific world, you would have a control group measuring the learning of those who did not take part in the network and compare it with those who were part of the group. However the reality of trying to do this in a meaningful way quickly appears faintly ridiculous. Another alternative would be to compare the impact of the learning group with alternative capacity building initiatives, such as training courses or reading materials. Again the reality of doing this in such a way as to provide useful information practice would be so expensive as to be cost-ineffective.

Clearly it is important to use a variety of data gathering methods to enable triangulation of findings. Some of the commonly used methods in evaluating learning networks include:

Common evaluation methods

Document review

- documents and reports produced by the learning network
- desk reviews of comparator partner learning projects

Observation of network activities (such as network meetings)

Survey – by email or web-based (survey monkey)

Semi-structured interviews - with sample of members (in person or by phone) and other stakeholders (donors, key informants)

Stories of change written up

Focus group discussions with members

Statistical analysis of downloads, web visits

Participatory exercises at network meeting, such as timelines

Where possible, evaluations of learning networks should be done in a way consistent with the learning aim of the network. For example with the CSNP evaluation, the evaluator took a participatory learning approach, getting the network members to identify achievements, failures and recommendations for change. But he also brought in his external perspective when he felt that members had missed out some critical information or underplayed an important finding. This helped meet donor interests in accountability.

Conclusion

Reasonably good monitoring and evaluation of learning networks is possible. 'Good enough' evidence is within the bounds of most budgets. But this requires careful planning – agreeing with key stakeholders, why, how, who and when the M&E should be done. It helps to keep expectations realistic. Information generated will not be perfect as it is subject to inherent methodological limitations. It may surprise us how much we know about M&E of learning networks. What we really need is the courage and commitment to put it into practice.

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