Good Practice Note:

Learning Dialogues

Introduction

A learning dialogue is a workshop which brings together key stakeholders and decision makers for implementing partners to make sense of monitoring and evaluation data. It is an opportunity to review evidence of program activities and achievements, interpret findings for the program, and decide what to do differently. The learning dialogue process was developed by Clear Horizon specifically for DFAT investments, as a process to promote adaptation and learning, and improve the quality of reporting. This good practice note provides a step-by-step guide for conducting a learning dialogue.

Step 1: Schedule the learning dialogue

- Schedule the learning dialogue 3 to 4 weeks prior to reporting deadlines, so that it can inform progress reporting. Learning dialogues are usually approximately ¾ day in duration.
- An inception workshop can be useful to clarify the objectives, scope, and timeframe to be considered at the learning dialogue.
- Confirm the date, time, venue, agenda, and participants. Participants usually include implementing partner staff, Embassy staff, and an independent facilitator (usually M&E House). Ensure that invitations and an agenda are sent well in advance.

Step 2: Identify sources of evidence for your program

Implementing partners are responsible to collect key evidence about their program activities and achievements. Evidence is any information that can be used to answer a question, or demonstrate the truth of an assertion. In the context of a learning dialogue, evidence is information about:
- **What did we do?** – Evidence of key program activities and outputs during the reporting period.
- **What did we achieve?** – Evidence of program achievements and outcomes during the reporting period, i.e. evidence of **what changed** as a result of your program activities.

Sources of evidence can include key informant interviews, activity tracking, service delivery data, surveys, reviews and research reports, stakeholder feedback, academic literature, expert opinion, and other relevant information such as media clippings, important emails, speeches, meeting minutes and reports.

Some types of evidence are considered "stronger" – more trustworthy – than others. Generally, evidence that comes from multiple reliable sources is considered stronger than evidence from just one source. The DFAT Aid Quality Check has a rubric to define the strength of evidence (Table 1). Generally, reporting of program activities and outputs requires strong evidence gathered from multiple reliable sources. Reporting of intermediate and end of program outcomes requires at least moderate strength of evidence.

Table 1: Rubric for strength of evidence for DFAT Aid Quality Check

Strength of Evidence	When this level of evidence is required	Definition
Strong	Reporting 'What did we do?' (i.e. activities, outputs), and elsewhere high level of accountability is required.	Evidence derived from multiple reliable sources such as independent reviews/evaluations, quality assured monitoring data, implementing agency reports validated by monitoring trips, and independent research conducted in the sector.
Moderate	Reporting 'What did we achieve?' (i.e. progress towards intermediate and end of program outcomes), context and other AQC requirements.	Evidence derived from a more limited range of sources such as implementing agency reports, records of monitoring visits or records of discussions with partners and other stakeholders.
Weak		Includes non-validated assertions, personal opinions and anecdotes. Weak evidence is not sufficient to rate an investment criterion as being satisfactory.

Step 3: Prepare your evidence matrix

An evidence matrix is a tool for collating evidence from multiple sources, arranged against your program key evaluation questions and sub-questions (Table 2). Implementing partners are responsible to collate key evidence in an evidence matrix. To complete the evidence matrix:

- Review the evidence matrix template (see below). Ensure that the key evaluation questions and sub-questions are consistent with your latest Monitoring, Evaluation and Learning Plan (MELP).
- Assemble all existing sources; for example, activity tracking reports, minutes of meetings, survey reports, report of key informant interviews, training reports, and partner reports.
- In the *Evidence* column of the evidence matrix, collate your evidence for each evaluation sub-question. Ideally this should be as comprehensive as possible, though gaps in data are manageable. You can further organise your evidence into evidence of "What did we do?" and "What did we achieve?".
- Aim to complete the *Evidence* column at least one week before the learning dialogue. The *Findings* and *Response* columns are completed during the learning dialogue.

Table 2. Evidence matrix template

Focus area[1]	Evidence *What happened?*	Findings *So what?*	Response *What now?*
Context update			
KEQ 1-Effectiveness: EOPO 1			
Sub-question 1.1	What did we do? What did we achieve?		
Sub-question 1.2	What did we do? What did we achieve?		
KEQ 2-Effectiveness: EOPO 2			

---

[1] This can be tailored to include other areas such as AQC criteria, principles, foundational activities, risks or other priority issues.

Sub-question 2.1	What did we do?		
	What did we achieve?		
Sub-question 2.2	What did we do?		
	What did we achieve?		

Step 4: Conduct the learning dialogue

The learning dialogue structure is flexible, but typically involves:

- **Introducing the learning dialogue**. The facilitator presents agenda, purpose, process and outputs of the learning dialogue.
- **EVIDENCE: What did we do? What did we achieve?** – *objective thinking*
  - o The facilitator presents evidence collated prior to the workshop on the magic walls. This is grouped by evaluation sub-question; additional evidence may also be collated for context, foundational activities, cross-cutting issues, principles and other matters that may not neatly fit within each evaluation sub-question.
  - o Participants review, add, change or drop the evidence until there is agreement on the evidence available. The strength of the evidence can be rated as high, moderate, or low using the DFAT AQC Strength of Evidence rubric.
- **FINDINGS: So what?** – *reflective and interpretive thinking*
  - o Upon agreement of the evidence, the next step is to reflect on and interpret the evidence to create findings. The findings are the agreed answer to each evaluation sub-question, based on the evidence. The facilitator assists participants to interrogate the evidence and co-develop findings as groups. This will assist in prioritising key messages for reporting at a later point.
  - o Examples of question to ask during this process are: What are the key messages from the evidence? What does the evidence mean in the broader context? Are we on track to achieve the program outcomes? What worked well? How could things have been done better?
- **RESPONSE: What now?** – *thinking through decisions*
  - o As a final step, management responses or recommendations are developed based on the findings. This should be a short list of actionable priorities for the next reporting period. The facilitator asks participants to identify and discuss the key lessons and management responses in their groups.
  - o If participants have been working in small groups, it is also helpful to report back to the whole group using a "weather report" structure. This provides a summary of what happened, the main findings, and the management responses.
- **Closing the learning dialogue:** The facilitator asks participants to reflect on the process, reporting needs, and how to operationalise the management responses and learnings throughout. A presentation may also be made to external parties, such as donors.

Step 5: Finalise the evidence matrix

After the learning dialogue, update the evidence matrix to reflect any changes to the *Evidence,* and to include *Findings* and *Responses* generated at the learning dialogue. The completed evidence matrix can be used as the structure for the annual progress report.