![HELVETAS Swiss Intercooperation]

Learning Expeditions: A Concept Note

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Description

In addition to the regular work undertaken in the context of projects, programmes and mandates, HELVETAS Swiss Intercooperation occasionally identifies topics that require deeper investigation and engagement in order for us to continue to improve our understanding of the topic and the effectiveness of our work. In order to achieve the depth of learning required and to ensure it is distributed in the organisation, a systematic approach needs to be taken. This is the intention of Learning Expeditions.

A Learning Expedition is a combination of conceptual and action research and reflection that contributes to understanding of a topic (both within the organisation and with key partners).

Rationale

At various levels we already pursue topics of interest which come up based on for example, project or programme work, or our engagement in thematic and other types of networks. The Learning Expedition approach is designed to:

- Focus limited institutional resources on an emerging and stragetic topic
- Lead to actionable results that can be leveraged across the organisation
- Provide a level of consistency in approach across topics

At the same time as the Learning Expedition approach provides a framework to investigate a wide variety of topics, it is not meant to be prescriptive. Different topics will require variations in approach, some may suggest a different order of tasks (especially in the early stages of exploration), and some will benefit from several phases, each building upon the previous one, and pursuing different and deeper questions.

Thus, it is envisioned that core teams in learning expeditions will themselves determine the extent to which they will need to deviate from the generic processes described in this document, realizing at the same time that higher levels of deviation will tend to require higher levels of investment in designing and pursuing the learning agenda.

How does a Learning Expedition unfold?

Learning Expeditions normally start from a process of ***identifying topics of strategic importance*** (e.g. new topics in the field of development, topics that arise from field experience) that the organisation is either not significantly engaged with, or has not fully integrated into its ongoing work. Another driver for a Learning Expedition is the recognition of a programming or operational gap that needs to be filled, so the Learning Expedition topic is seen as having potential to do this.

Once a topic has been identified for a Learning Expedition, a ***core team***[1] from within the organisation should be identified to pursue the expedition, along with 1-2 facilitators who will help the group to:

- Identify key partners with whom to co-develop the expedition (usually including a research institution), determine the overall learning agenda, milestones, etc.
- Conduct necessary ***background research*** to see what already exists on the topic

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[1] Ideally this team should: be small (no more than 3-4 persons) in order to be agile and cost-effective; include the person or persons who have primary responsibility for the topic or would have such responsibility if the topic were part of our ongoing work, and; consist of a mix of members from different programmes/departments.

- Design a research programme that will provide one or more opportunities to test early ideas in a real context, engage the core team and key stakeholders in a dialogue around the topic, and produce one or more envisioned outputs to further feed into the process
- Reflect on results after an appropriate time, incorporate new ideas, decide on follow-up (e.g. roll-out within the institution, further exploration, formation of alliances, etc)

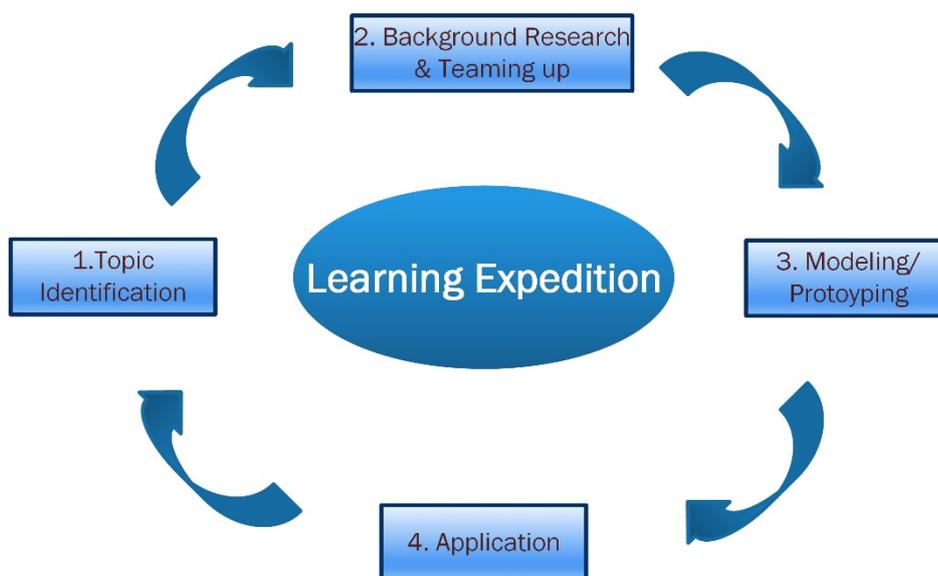The main sets of tasks associated with a Learning Expedition are:

Figure 1. Steps in a Learning Expedition

Although the above steps are presented sequentially to illustrate a typical flow from one set of tasks to another, each Learning Expedition will need to customize tasks to fit with contextual factors, goals of the expedition, etc. A presentation of how the process might lead to an additional phase can be found in Figure 3 below.

Step 1: Identifying a Learning Expedition topic

Learning Expedition topics can come up in a variety of ways. The key is that a topic needs to achieve a certain level of prominence within the organisation before it is designated as a Learning Expedition topic. This can happen as a result of internal lobbying around a topic by a small group of staff. It can also happen through the realisation by project and programme responsibles seeing influences on project/programmes contexts that are not currently taken into account in planning and implementation. A third possibility is that a topic could come up as a matter of interest in the course of strategic discussions (e.g within a region, in the context of a Shareweek). Finally, a topic may come up because it increases in prominence in broader development discourse.

Regardless of which of the above paths a topic takes, it will eventually be discussed between the management of the International Programmes (IP) and Advisory Services (AS) departments, where a decision will be made as to whether it warrants being designated as a Learning Expedition. From that point, one or more relevant responsible persons will be identified to lead the expedition and to identify potential key partners and resource requirements, which will then need to be take back to IP and AS management for validation.

The more detailed work starts from this validation.

Step 2: Building a team and conducting background research

This step sets the stage for the entire Learning Expedition and therefore includes a number of important tasks, which can be summarized under the headings *Identify Potential Travellers, Scope out Expedition,* and *Learn from Others*. Typical tasks associated with this step are illustrated in the following mindmap:
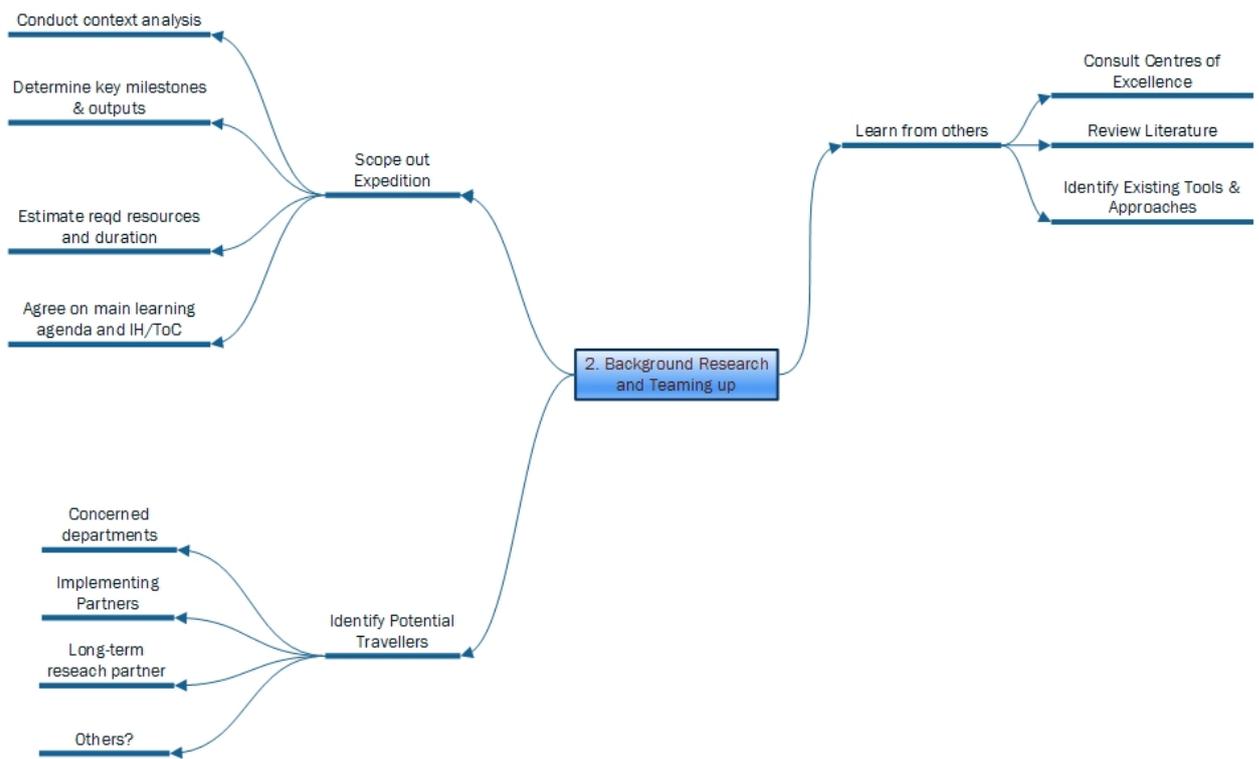

Figure 2. Background Research and Teaming up

As with the Learning Expedition process as a whole, the specific tasks undertaken within the steps need to be determined by the topic leads. For example, it may be that some tasks listed above will not be necessary. Similarly, to a certain extent the three main sets of tasks (identifying potential travellers, scoping out the expedition and learning from others) take place at the same time rather than sequentially, so the order of specific tasks will also be different for different expeditions.

A key task listed above is the agreement on the main learning agenda and Impact Hypothesis/Theory of Change (IH/ToC). The assumption is that by the end of Step 2 the IH/ToC has been created, but it is also possible that the IH/ToC is not completed until early in Step 3 – ModelingPrototyping. See Figure 3 the Learning Expedition Process Model, for an illustration of this.

Step 3. Modelling/Prototyping

This step is where the partners in the Learning Expedition will:

- process and analyse the background research, drawing out key insights for moving forward
- refine or create prototypes of any approaches, methods or tools they believe would further understanding of the topic
- identify (if this has not been done in a previous step) a specific project or projects within which the approachs, method and/or tools can be piloted. Note: In many cases there will be existing existing projects with an interest in working on the Learning Expedition topic, but in some cases it may be that a completely new project would be created within a relevant programme as a response to the level of institutional interest in the topic.

The above bullets summarize this step quite briefly, but of course depending on circumstances the level of effort and duration of this step can vary widely, depending on both the learning agenda of the expedition and the availability of existing knowledge and information on the overall topic.

Step 4. Application

When the conceptual research is well underway, a crucial part of the Learning Expedition will be to validate the research and to adapt it to specific contexts. Step 4 is the opportunity where the approach and – if applicalbe – specific tool(s) or methods is/are put to the test in an actual project situation. This will undoubtedly result in recommendations to change certain aspects of the approach, method or tool, in order to adapt it to local circumstances.

The results of this step should include sufficient learning to illustrate the potential value of doing further work on the Learning Expedition topic as well as how the topic can be incorporated into relevant projects, programmes and ways of working.

It may be that the expedition leads to further questions or to subtopics which themselves require further investigation, perhaps through one or even two followup Learning Expeditions. This needs to be determined by an assessment of the outcome and outputs (if any) of the initial Learning Expedition.

It is expected that most Learning Expeditions will result in clarity around whether and how the organisation and its partners should deepen the topic further and perhaps mainstream it. In some cases the conclusion might be that the organisation should not mainstream the topic in any way, but instead only pursue it in specific contexts.

The Learning Expedition Process: an iterative learning approach

Aside from the four steps described above, it may be useful to illustrate the iterative nature of Learning Expeditions. In general, an expedition would proceed from step 1 through to step 4 in sequence, but – as mentioned – in some cases the steps may overlap and some tasks associated with a given step could be taken before the previous step is fully underway. The main thing is that the general sequence as depicted in the figure below is maintained, and that towards the end of the application process there is a moment of reflection and drawing out of learning that will inform decisions about future activity in relation to the Learning Expedition topic.

As mentioned above, the figure below also allows for the possibility that a second phase of the expedition be initiated, which would follow a similar set of steps, but with a different set of questions and possibly a different mix of travellers. The Modelling/prototyping step will likely refine the approaches, methods or tools developed in phase 1, and the application phase may or may not include the same project(s) as in the first phase.
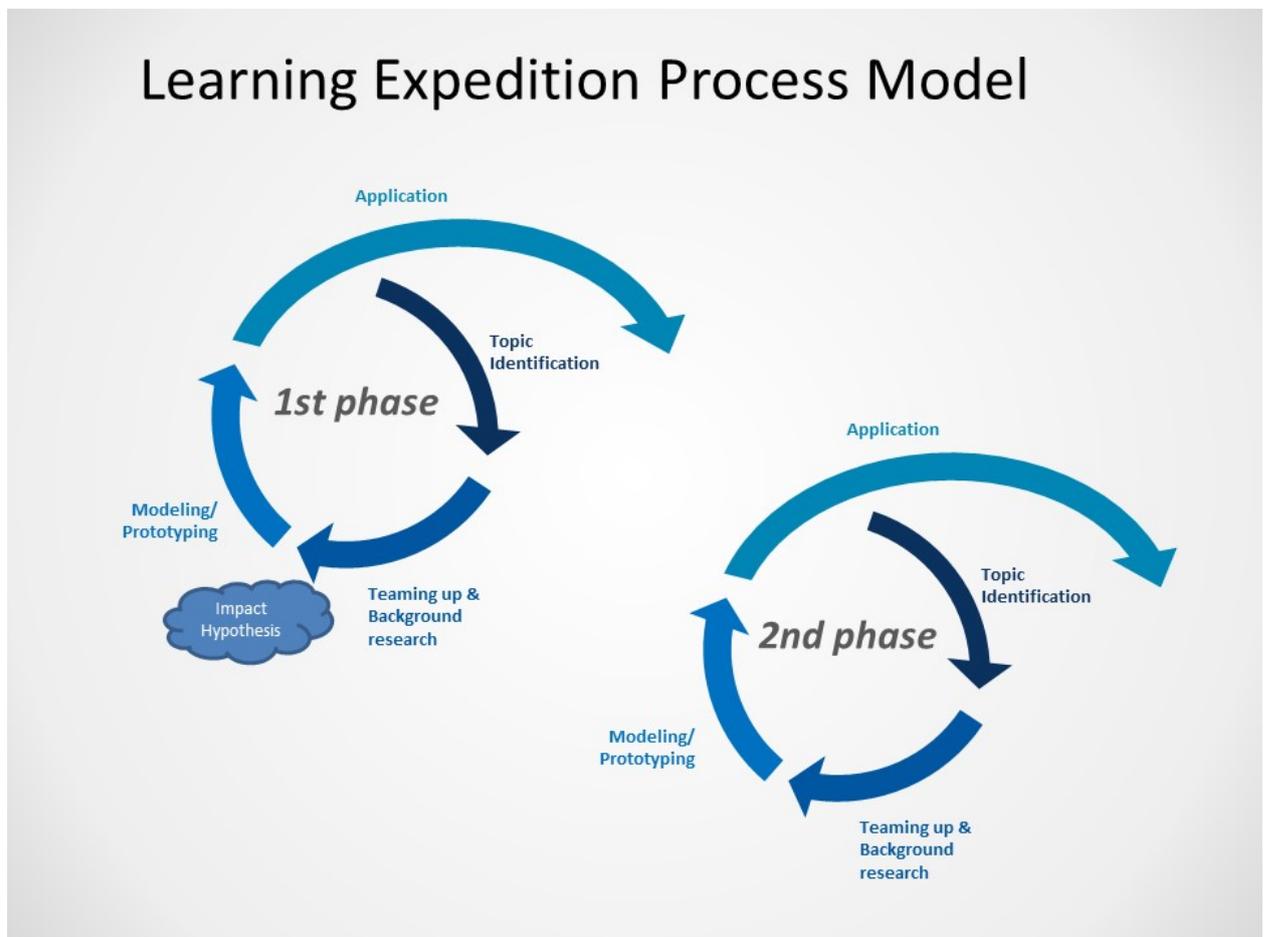

Figure 3 The Learning Expedition Process