



*A tool to keep track of the lessons learned along the journey in order to apply them in reports, advocacy and future scale-up efforts.*

## TOOL 4C Documenting Learning

A worksheet to capture what you are learning on a key question of interest, and to monitor how information about this question can improve adaptation and scale.

*SOURCE: Expandnet: The Implementation Mapping Tool*

Taking time to reflect regularly on key learning questions provides the opportunity to identify useful insights on adaptation and scale up. Decisions and actions may seem like clear choices in the moment, but we may forget later what and why those adaptations were made. Recording our learning helps us share and use this information later when scaling up to other sites.

**TOOL 4C Documenting Learning**

**STEP 1: SET YOUR LEARNING QUESTIONS FOR SCALE-UP**

Consider horizontal factors, vertical factors, risks, and preconditions related to achieving your action-plan results through adaptation and scale up. What do you want to monitor? What are you curious about? Where are you unsure? These are the places to write a learning question.

**STEP 2: COMPLETE ONE REFLECTION SHEET PER LEARNING QUESTION**

Using 1 of your learning questions, fill out this worksheet periodically. A blank worksheet is included on the following page.

**Documenting Learning Worksheet**

DATE OF THIS REFLECTION	PERIOD OF REVIEW
LEARNING QUESTION:	
WHAT HAPPENED?	
WHAT WORKED?	
WHAT DIDN'T WORK?	
WHAT DID WE DO NOW? ACTION STEPS:	
CHECKING OUR PROGRESS	
DATE	WHAT NOW?
DID WE COMPLETE THESE ACTION STEPS?	
<input type="checkbox"/> YES <input type="checkbox"/> NO	

**INSPIRE** Center for Information Systems and Policy Studies | Worksheet for Tool 4C: Documenting Learning

**STEP 3: REGULARLY UPDATE YOUR LEARNING**

Repeat this process regularly. Go back to your prior sheets as a starting point.

**Documenting Learning Worksheet**

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**INSPIRE** Center for Information Systems and Policy Studies | Worksheet for Tool 4C: Documenting Learning

*AVAILABLE FORMATS: The worksheets included here are meant for printing at A4 size. Visit the Guide's website for downloadable interactive (fillable) PDF worksheets, alternate languages and alternative formats.*

[inspire-strategies.org/adaptationandscale](https://inspire-strategies.org/adaptationandscale)

# How to use this tool

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- 1 Select a key “learning question” to track. Something you are curious about, want to monitor, or where there are many unknowns.
- 2 Write this question down. Document what happened in relation to this question, how activity changes influenced the program, what resulted, and if further change is needed. Do this at least quarterly.
- 3 This tool can be used by the National Coordination Mechanism to focus on their role managing scale up, or by Implementing Partners across different sites. The information can then be shared to draw lessons learned from and for scale-up efforts at the national level.

## THINGS TO KEEP IN MIND

- The more often you do it, the less time it will take.
- This activity is most helpful when completed by Implementing Partners, and shared back with the National Coordination Mechanism.

REMINDER...FEEL FREE TO ADAPT THIS  
TOOL IN ANY WAY THAT WORKS FOR  
YOUR TEAM AND YOUR CONTEXT!

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**INSPIRE** | Guide to Adaptation and Scale Up Worksheet for Tool 4C : Documenting Learning

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# Documenting Learning Worksheet

DATE OF  
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PERIOD OF  
REVIEW

LEARNING  
QUESTION:

WHAT HAPPENED? .....

WHAT WORKED? .....

WHAT DIDN'T  
WORK? .....

WHAT DO WE DO  
NOW? ACTION  
STEPS. ....

## CHECKING OUR PROGRESS

DATE

WHAT NOW?

.....  
DID WE COMPLETE THESE ACTION STEPS?

YES

NO

# Now What?

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## YOU SHOULD NOW HAVE...

- A series of sheets showing an evolving understanding of a key question about scale-up activities
- Documented action steps to follow up on

# Act and Apply

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Is there a section in the action plan where the importance of taking stock and documenting learning with partners and stakeholders is explored? Should there be?

How will the National Coordination Mechanism + Resource Team and partners apply and share these learnings?

## RELATED TOOLS:

- **Tool 1E:** The “What Could Possibly Go Wrong?” Game
- **Tool 1F:** Uncovering Risks and Preconditions to Achieving Action Plan Results
- **Tool 5B:** Adapting in Response to Stakeholder Feedback
- **Tool 5C:** Pulling In the Same Direction: A Cross-Sectoral Review

