MANAGEMENT SCIENCES FOR HEALTH

Learning Guidance

STRATEGIC INFORMATION (SI), PROGRAM DELIVERY GROUP (PDG)

Version 2, February 2024 Update

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ACRONYM LIST

CLA: collaborating, learning, and adapting

HMB: Healthy Mothers and Babies

HSR: human subjects research

HWHF: Healthy Women, Health Families

IRB: institutional review board

KM: Knowledge Management

LMRP: Leading and Managing for Results in Pandemics

MEL: monitoring, evaluation, and learning

MSH: Management Sciences for Health

PDG: Program Delivery Group

SC: Scientific Committee

SI: Strategic Information

SIEs: Standards of Implementation Excellence

TPR: technical performance review

EXECUTIVE SUMMARY

As a leading global health organization, Management Sciences for Health (MSH) optimizes the use of data and strategic information (SI) to enhance learning and improve the implementation of health systems strengthening activities and health outcomes for the populations we serve. MSH's SI staff deliver technical assistance in learning to projects by developing, strengthening, and institutionalizing approaches and tools to identify, capture, and share knowledge to improve performance and contribute to organizational, project, and global learning priorities. MSH recommends all projects should be implementing the following learning activities:

A) Develop an **initial research/learning agenda** (based on a set of questions), defined at the proposal stage and informed by global best practices for implementing learning in projects.

B) Conduct routine **technical performance review (TPR) meetings** with project managers, key stakeholders, technical staff, and monitoring, evaluation, and learning (MEL) staff to identify what works or does not work in the program and what can be improved (or solved or prevented), with an emphasis on—but not limited to—quantitative data. An output of these meetings should be an action plan that is reviewed again at the following performance review meeting to track the status of actions. These meetings are convened no less than once per quarter and as frequently as once per month if feasible.

C) Design and implement **studies** (research, evaluations, reviews) in collaboration with technical staff and the SI team to answer questions from the learning agenda and disseminate findings.

D) Hold an **annual lessons learned/planning workshop** with key partners, managers, and select technical staff to review steps 1-3 and the best approaches to identify and prioritize recommendations and solutions for adapting the project.

E) Conduct an **end-of-project learning workshop** with project staff, document these discussions, and use findings to inform the design and implementation of other existing and future projects.

F) Plan a **global knowledge exchange** (across projects) before project close-out to present findings, document results in Institutional Memory, and synthesize findings in the appropriate community(ies) of practice.

By implementing learning activities, your project will: 1) facilitate data-driven methods and processes for answering learning/research questions and generate evidence of MSH attributions and contributions to program and health outcomes; 2) determine whether the knowledge generated is used regularly for improving program design and implementation; and 3) develop actionable recommendations to strengthen knowledge use within and performance of projects. For projects to be most effective and efficient in achieving their targets, goals, and objectives, learning must be embedded into every step of the project life cycle beginning with the project design phase, implementation, monitoring and evaluation (and reflected in the project MEL plan), and project close-out.

Further details on how to guide projects throughout the implementation of these activities can be found in annex 1: MSH Action Tracker for Learning Activities.

1. PURPOSE

To ensure the best possible outcomes for the communities we serve, MSH is committed to continuously learning and strengthening the design and implementation of our projects. As described in this document, data use is an integral part of learning. Building an organizational culture of learning is a journey that requires commitment and collaboration from everyone. Rigorous monitoring, evaluation, and research produce the information needed to test our hypotheses, understand the outputs and outcomes of our work, and track progress toward achieving our goals. Use of this information for the purposes of continuous quality improvement and adaptive management is incumbent upon all of us. The purpose of this Learning Guidance is to provide MSH staff with guidance and concrete approaches to systematically incorporate learning into projects to strengthen activities and outcomes and to become a stronger learning organization.

2. MSH LEARNING FRAMEWORK AND ACTIVITIES

The MSH Learning Framework (figure 1) provides an overview of recommended learning activities spanning project start-up, implementation, and close-out. The framework indicates key learning activities to implement throughout the project cycle to ensure that learning and adaptive management are a central part of MSH's projects. At the start of the project, the team should develop a learning/research agenda to inform learning priorities throughout the project (Activity A). During project implementation, recommended activities include convening TPRs to assess progress toward project milestones, document practical lessons learned, and develop actionable recommendations or next steps (Activity B); conducting studies to investigate and more deeply understand specific topics of interest (Activity C); hosting annual learning workshops to synthesize learnings (Activity D); and holding knowledge exchanges to share learnings with a broad audience (Activity F). At the end of the project, it is recommended that projects convene an end-of-project learning workshop (Activity E) and a knowledge exchange (Activity F). Each of these activities is discussed in detail below.

Figure 1. MSH Learning Framework
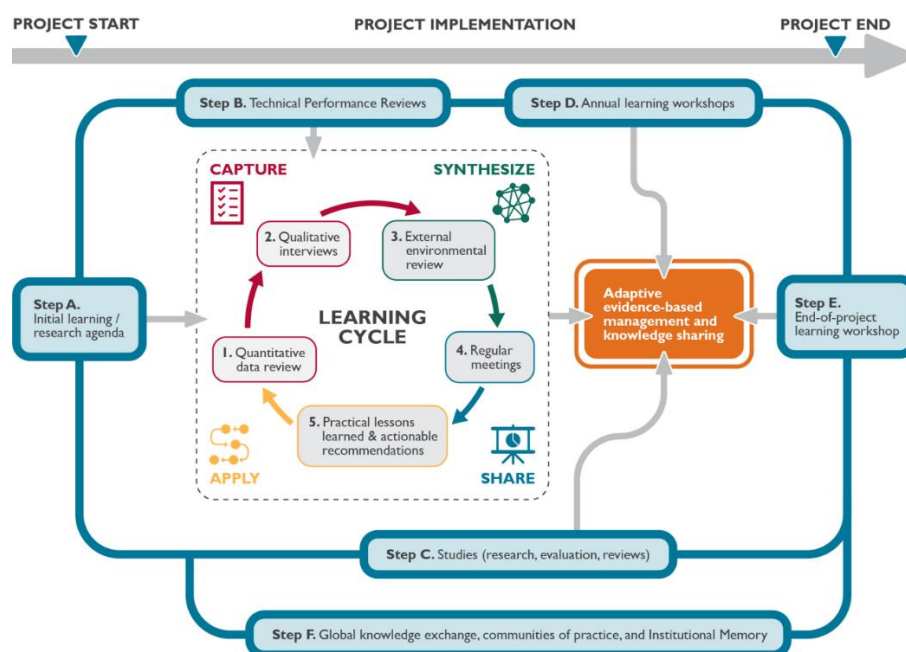
While the six activities in the MSH Learning Framework (i.e., Activities A-F) are appropriate for large projects, smaller projects may need to adjust the framework based on the project activities, duration, donor requirements, and budget. For instance, short projects may not conduct annual learning workshops. Additionally, less complex projects may conduct fewer research studies. Projects based in fragile settings may also need to adjust activities—for example, from in-person to remote—to maximize participation. The SI team is available to help all projects select the learning activities that are the most relevant and will produce the most value in the given context.

MSH's checklist of recommended activities for learning and action tracker (template in annex 1) can guide projects on the learning activities throughout the project life cycle. SI liaisons will track and update the status of implementation using the MSH Learning Guidance Tracker. Detailed instructions are available in the tracker.

RECOMMENDED LEARNING ACTIVITIES

A. THE INITIAL LEARNING/RESEARCH AGENDA

Below are key steps for developing and implementing a learning agenda. These steps are described in additional detail below.

1. Conduct a literature scan and/or needs assessment to inform the learning questions.
2. Identify and prioritize learning questions, including anticipating how their answers will be used for adaptive management.
3. Operationalize the learning agenda by setting a timeline and allocating resources (i.e., funding, staff).
4. From the list of prioritized learning questions, identify available data sources and design the learning activities to fully answer the learning questions. Identify any gaps and design methods to fill these.
5. Based on methods selected, decide on probable learning products in line with anticipated findings and use as well as intended audience.
6. Share and reflect on the findings and how they should be used for project-based quality improvement and adaptive management. Involving the project leadership team as early as possible in the learning process is critical to ensure the findings are used to inform actionable recommendations and then lead to concrete and measurable improvements.
7. Develop learning products to document results and findings.
8. Disseminate learning products to key stakeholders (e.g., project staff and partners, donors, other projects leading similar work) to share emerging or best practices.
9. Review and update learning agenda annually.

A learning agenda includes a set of questions to address critical knowledge gaps and associated methods/activities to answer the questions. The answers to the learning questions should inform adaptive management and can also be used to create learning products for disseminating findings to build the evidence base. The learning agenda assists the project team in testing and exploring assumptions, filling knowledge gaps, and—most importantly—making informed decisions that will maximize efficiency and effectiveness.

The learning agenda is typically outlined at the proposal stage, then further developed and refined during project start-up and then iteratively (typically, annually) throughout project implementation. Additionally, it may be advisable to align it with the MSH/USAID 2030 vision learning agenda (optional), as well as global best practices for implementing learning in projects.

Development of the learning agenda begins with a literature scan, including reviewing the published and gray literature (i.e., reports, policies, working papers, government documents, white papers) with the goal of identifying needs and/or challenges to be addressed through project design and implementation. Policy documents and strategic plans are valuable for aligning the project design and learning agenda with government priorities. Reports and secondary data sources (e.g., health management information system, Demographic and Health Survey) should be reviewed to understand the magnitude of the issue and trends or progress achieved over time. Importantly, local MSH staff and government officials may be engaged to validate or dispute findings from the literature scan, to map system dynamics (actors, relationships, opportunities, challenges, and risks), to provide their perspectives on root causes of the issues at hand, and to propose interventions that will be most effective based on local context. Projects are encouraged to update their literature scans in tandem with updating their learning agendas to ensure projects proceed based on the most current information available.

Next, the team identifies a series of questions whose answers may be used to inform or enhance the effectiveness of project implementation, catalyze data-informed decision-making, and build a strong system of knowledge exchange. These questions should be developed collaboratively and prioritized based on the value of answering the questions, taking into consideration the anticipated use of the findings and the resources available to answer the question (e.g., funding, staff time, overall project timeline). Throughout the project, these questions can and should be collaboratively revised to align with the project's progress and new questions that arise during implementation. To answer the learning questions, the team should confer and decide upon the methods and tools to be used for the learning activities, such as interviewing key stakeholders and implementers, holding learning workshops, or conducting studies. Most importantly, learning activities should support continuous evidence-based quality improvements to strengthen activities and outcomes. Overall, there are three main types of learning questions that can be incorporated into a learning agenda:

Types and Examples of Learning Questions from USAID Missions

Types	Purpose	Examples
Theories of Change	Test and explore theories of change	*USAID/Uganda Theory of Change:* If Ugandans have a strong health system and high-quality service delivery that is accessible, then they will use health services and Ugandans will become healthier. *Learning Question:* In what ways does the strengthening of Uganda's health systems improve the quality, availability and accessibility of health services in the country?
Technical Evidence Base	Fill critical gaps in our technical understanding	*USAID/Pakistan:* What are the barriers to women receiving higher education scholarships provided by USAID/Pakistan's Merit & Needs Based Scholarship Program (MNBSP)?
Scenario Planning	Develop scenarios and identify game changers	*USAID/DRC:* What, if any, unanticipated game changers developed during the life of the country strategy and impacted results? Other examples: What if conflict worsens? How will we adjust approaches? What if a specific law passes? How can we support targeted groups?

The SI team has produced a learning agenda template. This template can serve as a guide and can be adapted to suit each project's needs.

![MSH logo — Management Sciences for Health]

The project's learning agenda should include a plan for developing and disseminating evidence-based knowledge products. Knowledge products should be designed to clearly communicate evidence and findings to key stakeholders and propose a way forward to inform decision-making and program design. Some examples of these products include peer-reviewed publications, presentations at conferences, survey reports (with recommendations), technical briefs, case studies, job aids, guidance documents, webinars, social media posts, blogs, brochures, and infographics.

Once the plan has been created and accepted by project leadership and other key stakeholders, implementation ensues. As a project begins to answer its learning questions, further questions may arise, leading the team to refine the theory of change, adapt implementation strategies, adjust learning questions, and/or modify learning activities. Ensure the continued relevance of the learning agenda by reviewing and updating it with new learning questions and/or activities periodically—ideally at least once each year as part of annual work planning.

B. TECHNICAL PERFORMANCE REVIEWS

Convene TPR meetings no less than once per quarter, and as frequently as once per month if feasible, with key project technical staff and managers. First, the meeting is used to review key tracer indicators (10-15 indicators, depending on the scope of the project) selected by the project team to understand whether the project is on track by assessing progress to targets. Second, the participants discuss in depth a pre-selected "deep dive" topic focusing on off-track or at-risk indicator(s) to identify root causes and develop plans to address challenges. Meeting outcomes should include clear documentation of recommendations and action items. Detailed guidance for TPR meetings, including roles and responsibilities, is available in the [TPR Guidance and Procedure](#).

C. STUDIES (INCLUDES RESEARCH, REVIEWS, EVALUATIONS)

A range of research activities and studies can be used to generate knowledge and lessons learned. There are many types of research, and the initial design of the learning/research agenda should guide the project's research activities. Broadly, research may use:

- Quantitative methods such as surveys

- Qualitative methods such as interviews, focus groups, or case studies

- Mixed methods, which combine quantitative and qualitative methods to leverage their unique strengths

Data sources for studies may be primary or secondary:

- Primary data are collected by the research team for the purpose of answering a learning or research question.

- Secondary data are those collected for another purpose that can be used to answer the learning or research question.

In public health, research can be used for a wide variety of reasons. Some common reasons for conducting research are to:

- Understand social determinants of health

- Measure the prevalence or incidence of a disease or condition in the population

- Determine the quality or effectiveness of a public health intervention

- Estimate the efficiency of a public health program

- Identify emerging or known best practices in a field or area of public health practice

Selecting optimal research methods requires technical expertise, research experience, and careful consideration of contextual factors that will inform the feasibility of conducting the study. Projects should keep an inventory of their research activities and update the research study tracker.

To ensure the protection of human subjects during research and primary data collection activities, MSH has established a Scientific Committee (SC) to review all research and/or primary data collection protocols prior to study implementation. The SC is responsible for determining whether a study protocol meets the criteria for human subjects research (HSR) and therefore requires ethical review by a qualified institutional review board (IRB). To comply with MSH's HSR Policy, the Principal Investigator for the protocol is required to submit the form entitled MSH Implementation Research Protocol Summary Form found on Ollie for review by the SC (scientificcommittee@msh.org), ideally three months prior to the anticipated implementation of the study protocol and before IRB review/approval is sought. A copy of any IRB approval obtained must be sent to the SC for documentation purposes prior to the study commencing. All MSH staff are required to comply with MSH's HSR policy. For more information, please refer to the MSH Policies for the Protection of Human Subjects Participating in Research.

The MEL team is available to assist and collaborate with projects seeking to design and implement studies and to support dissemination of findings, including through development and presentation of abstracts at conferences. Please refer to the MSH Guidance for Developing Conference Abstracts for more information.

D. ANNUAL LEARNING WORKSHOPS

Projects should organize and facilitate annual learning workshops prior to work planning to incorporate learning activities into the work plan as part of a robust adaptive management practice. The workshop is an opportunity to reflect on and, if needed, adapt the learning questions, identify lessons learned, and develop recommendations to improve project implementation.

MSH projects can guide learning workshops by utilizing the Program Delivery Group (PDG) Standards of Implementation Excellence (SIEs). The SIEs are grouped into seven categories of technical excellence that are essential to effective project implementation. To ensure that projects can meet and comply with the standards, both project and organizational leadership must create an enabling environment and promote the use of evidence and understanding of contextual factors, opportunities, and bottlenecks.

E. END-OF-PROJECT LEARNING WORKSHOP

At the end of a project, preferably six months before close-out, a learning workshop should be held with project staff. The meeting leverages project monitoring and evaluation data, lessons learned, and best practices to devise recommendations for adapting and improving future project implementation. A two-day workshop will be conducted where a summary of the lessons learned during the project (all recommendations) will be extracted and discussed. The project learning questions will also be discussed, answers shared, and new learning and/or research questions suggested based on findings, gaps, or opportunities.

F. GLOBAL KNOWLEDGE EXCHANGE

Throughout the project cycle, Comms/Knowledge Management (KM) will work with projects to organize knowledge exchanges, such as contributions to Institutional Memory and the Communities of Practice. Best practices from the knowledge exchanges will then be synthesized by champions in the relevant Communities of Practice. Similarly, all knowledge products prepared during the life of the project should be included in the Institutional Memory database as soon as they are finalized. Peer-reviewed publications will be tracked by the Comms/KM team.

ANNEX 1. (SAMPLE) MSH ACTION TRACKER FOR LEARNING ACTIVITIES

	Learning activity	Status, notes, & links	Next steps (to be inserted by project team)	Person responsible	Frequency (minimum)
1	**Develop a research/learning agenda**	Learning Agenda Template		MEL/collaborating, learning, and adapting (CLA) lead	Defined at proposal stage; updated annually thereafter
2	**Conduct TPR meetings**	Regular TPR meetings (suggested template) Define recommendations for addressing issues and report on the implementation using an action tracker		Country project director, in coordination with project technical and MEL staff and PDG and Global Health Systems Innovation support teams (details in TPR Guidance and Procedure)	Regular (e.g., monthly or quarterly)
3	**Design and implement studies (incl. research)**	MSH Research Protocol Summary Form (for submission to the SC) Research Protocol Template		Research/MEL staff	As aligned with project activities/theory of change; two to three recommended for a five-year project
4	**Hold learning workshops**	Use the SIEs to guide this work		MEL/CLA lead	Annually
5	**Conduct an end-of-project learning workshop**	Using a lessons learned action tracker		MSH staff across various projects and country offices	Six months prior to project close-out

					(last year of implementation)
6	**Plan a global knowledge exchange**	[Knowledge Exchange Procedure](#)		Comms/KM	Throughout the project cycle

ANNEX II. TPR AND LEARNING WORKSHOP QUESTIONS

Criteria to consider	Illustrative questions for fostering the Monitoring → Learning → Action transition
Effectiveness	- What performance targets have been met? What has contributed to expected performance? What context should also be considered in this relationship? - For targets that were not met, what contributed to less than expected performance? What context should also be considered in this relationship? What improvements or mitigations should be considered? - For targets that were exceeded, what contributed to this achievement? What context should also be considered in this relationship?
Relevance	- Has the context changed? How has this affected project performance? - Were initial assumptions accurate? Do they need to change? - Are the data we are collecting still relevant?
Efficiency	- Is the cost/benefit ratio as expected? Higher? Lower? - Are there more economical ways of achieving the results? - Are there ways, within the budget, to achieve results faster?
Fidelity and Reach	- Are more/fewer people reached than planned? What is the reason? - Are relevant subgroups participating/benefitting equally? - Are there spread effects—beyond the target area or groups? - Have the project activities been implemented as intended? - Have we heard about any unanticipated consequences of project implementation?
Sustainability	- Is there a clear and feasible sustainability plan in place? - What actions have been taken on the plan and with what success? - Are there areas of concern around sustainability?

ANNEX III. EXAMPLES OF LEARNING IMPLEMENTED IN MSH PROJECTS

Project name and country	Example
Healthy Mothers and Babies (HMB), Guatemala, and Healthy Women, Health Families (HWHF), Bangladesh	**Opportunity:** Two maternal and child health projects implementing group antenatal care sought to strengthen their MEL systems. Recognizing the projects' complementary strengths and weaknesses, the SI liaisons held a knowledge exchange. **Actions taken:** Through quarterly meetings, MEL staff from the two projects presented their MEL systems, asked questions, and exchanged lessons learned, tools, and resources. Armed with their new knowledge, the HMB project in Guatemala decided to build a Power BI dashboard to monitor and visualize their performance data. The HWHF project in Bangladesh decided to improve their data quality through data verification at project sites. **Success/outcome:** The two projects strengthened their MEL systems. Data quality improved after HMB adapted and implemented HWHF's data verification approach. HWHF is incorporating HMB's data visualization recommendations into existing dashboards, including dynamic graphs to assess the progress of targets achieved and ensure data is utilized for decision-making and evidence-based recommendations.
Leading and Managing for Results in Pandemics (LMRP), multiple countries	**Opportunity:** The LMRP Program aims to prepare and strengthen public health leadership for future pandemics. The quantitative data collected by the program only told part of the story about the results and did not capture how program participants applied the skills and tools gained in the course to their public health work. **Action taken:** The SI liaison used outcome harvesting evaluation methodology to better understand program results. Outcome harvesting is a qualitative method appropriate for retrospectively understanding what changed directly from those who participated in the program. The SI liaison, who was leading the evaluation, designed the study and submitted the protocol and tools to the MSH SC and Population Services International's Research Ethics Board, or IRB. After the IRB approval was obtained, the evaluation team collected and analyzed the interview data, triangulated the quantitative and qualitative data, summarized the findings, and developed recommendations. **Success/outcome:** The outcome harvest found robust evidence that the LMRP Program led to improved teamwork and the application of leadership and management principles in their work. While managing disease outbreaks such as dengue fever, cholera, and Ebola, program participants also reported they were more prepared to plan for and manage challenges. To show the success of the LMRP Program, the findings were disseminated through a global webinar and evaluation report and will be submitted to peer-reviewed journals.

ANNEX IV. RESOURCES

1. [Doing Development Differently Means Doing Monitoring, Evaluation & Learning Differently Too](#)
2. [Does evaluation need to be done differently to support adaptive management?](#)
3. [Rainbow Framework](#)
4. [Global Learning for Adaptive Management](#) initiative
5. [Problem Driven Iterative Adaptation Toolkit](#)
6. [Monitoring, evaluation, and learning: Adaptive management to achieve impact results](#)
7. [Monitoring, Evaluation and Learning (MEL) Guide](#)
8. [ADS Chapter 201: Program Cycle Operational Policy](#)
9. [Intro to Knowledge Management](#)