**Worksheet: How to Create a Learning and Adaptation Plan**

This worksheet aims to provide a general outline and some guidance to help you develop your learning and adaptation plan. This plan could either be a standalone document, or it could be integrated into other project documents, such as a Monitoring, Evaluation, and Learning (MEL) plan.

**Section 1 – Learning and Adaptation Objectives**

Use this section to define the project’s objectives and needs related to learning and adaptation, including defining questions for a learning agenda. Answer the following questions:

* Why is learning and adaptation important for your project?
* What are the specific learning objectives for your project? These objectives could include:
	+ Testing and assessing the validity of your theory of change and exploring assumptions and hypotheses during project implementation.
	+ Filing knowledge gaps that might be impeding informed design and implementation decisions.
	+ Making more informed decisions and improving the effectiveness and efficiency of project strategies, approaches or activities.
	+ Advancing collaboration, exchange, and learning among stakeholders.
* What are the learning questions associated with the project’s learning objectives?

**Section 2 – Learning Methods and Activities**

Use this section to define the methods and activities you will use to generate, analyze, and synthesize learning. You could include activities to reflect, collect feedback, or monitor context.

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| **Method/Activity***Provide the name and a brief description of the planned activity.*  | **Purpose***What learning questions does this activity feed into?* | **Plan to Analyze and Share Learning***How will the collected data be analyzed and shared and with whom?* | **Timing and Frequency***Is this a one-time or a routine learning activity? What period or at what milestone does it need to be completed?*  | **Necessary Resources***Who will be responsible for implementing learning activities? What resources do we need?*  |
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**Section 3 – Adaptation Process**

Use this section to plan steps for analyzing the learning and feeding data back into decision-making and implementation. Answer the following questions:

* Which mechanisms will you use to adapt your project based on learning?
	+ Which mechanisms will be used to make small adjustments throughout implementation?
	+ Which mechanisms can be used to identify and decide on strategic adaptations or changes?
* What is the process for decision-making related to adaptation?
	+ Who is authorized to decide on adaptations, and how is decision-making different for small adjustments versus strategic adaptation?
* What is the process to document changes and keep clear records of decisions and adaptations?

**Section 4 – Coordination and Management**

Use this section to identify the necessary resources and team roles to support the learning and adaptation process. Answer the following questions:

* Who are the team members involved in the learning and adaptation process and what are their roles?
	+ Are there dedicated team members for learning and adaptation?
	+ How will other team members be involved in and support learning and adaptation?
* Who from outside your team (donors, partners, beneficiaries, etc.) will be involved in learning and adaptation and what are their roles?
* What are the budget and other resources needed to carry out learning and adaptation? Are these resources available or do they need to be obtained?

Sources:

* [How-To Note: Project Monitoring, Evaluation, & Learning (MEL) Plan](https://usaidlearninglab.org/sites/default/files/resource/files/cleared_-_how-to_note_-_project_mel_plan_r.pdf):
* [Learning and Adaptation Strategy – United Nations Kyrgyzstan](https://www.undp.org/content/dam/unct/kyrgyzstan/docs/General/UNPBF-%20KYRG-%20Learning%20%26%20Adaptation%20Strategy.pdf)
* USAID’s CLA Toolkit [section on Learning Agendas](https://usaidlearninglab.org/node/14637)
* FHI 360’s experience in developing learning and adaptation plans