

BUILDING AN ORGANISATIONAL LEARNING & DEVELOPMENT FRAMEWORK: A GUIDE FOR NGOS

Abstract

This guide describes a process of designing a Learning and Development Framework within your own NGO or for supporting a partner organisation. A range of tools and models are illustrated with guidance on how to adopt and use them. Recommendations are provided for organisations wanting to adopt measures for the first time. Brief examples are also given of three different sized NGOs and their approach to Learning and Development.

March 2017



Authors

CHS Alliance and Ann Start ([Start Development](#)).

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Introduction

Why adopt a Learning and Development framework?

Over recent years, key research has identified the need to strengthen the capacity^{1,2}, and capability of INGOs and local organisations, and the people within those organisations, to address the increasing demands of numerous emergency, disaster and poverty related humanitarian crises.

A range of major initiatives are underway, of which the following highlight the need to support staff and organisations in developing skills, knowledge and behaviours to improve support to crisis affected communities.

The **DEPP**³ programme objective is to ‘strengthen skills and capacity to improve the quality and speed of humanitarian response in countries at risk of natural disaster or conflict related humanitarian emergencies’. **‘The Core Humanitarian Standard on Quality and Accountability(CHS)’**⁴ lists nine Commitments which organisations and staff/volunteers involved in the sector can adopt to improve the quality and effectiveness of the aid delivered. Note, Commitment 7 states Humanitarian workers continually learn and improve, and Commitment 8 states ‘Staff are supported to do their job effectively...’. The **Humanitarian Leadership Academy** is currently developing a learning and evidence strategy, and research in this area is being carried out by **Oxfam Policy Management** on behalf of the IFRC with the University of East Anglia. While the main focus of this toolkit is on staff learning and development, many of the principles can also be applied, and the tools accessed, additionally for management and leadership development. **Mckinsey’s** research (2014) on social sector leadership recommends ‘committing more funds for leadership development, targeting the resources leaders say they need, and securing increased mentoring and coaching’. This could be developed as a parallel programme.

There is currently an emphasis⁵ on Quality and Accountability for humanitarian response, protecting vulnerable communities, promoting human rights and ensuring resources are effectively managed. This toolkit is designed for organisations which identify with the following situations:

- Small to medium sized NGOs with limited HR capacity and little or no structure currently in place for implementing an employee Learning and Development programme.
- NGOs in the early stages of their lifecycle, or where a new NGO is being formed.
- Large NGOs seeking to offer support to partner organisations in the development of an L&D framework, where their own L&D frameworks might be too complex to be adopted.

¹ PEPFAR (2012) Capacity Building and Strengthening Framework Cited UNDP Capacity Development Practice Note (2008). United Nations Development Programme.

http://www.undp.org/content/dam/aplaws/publication/en/publications/capacity-development/capacity-development-a-undp-primer/CDG_PrimerReport_final_web.pdf New York, NY 10017 USA. Accessed 18/11/2016.

² Ibid ‘the ability of individuals and organisations or organisational units to perform functions effectively, efficiently and sustainably’

³ Business Case Intervention Summary: Disasters and Emergencies Preparedness Programme. http://iati.dfid.gov.uk/iati_documents/4397181.odt. Accessed 18/11/2016.

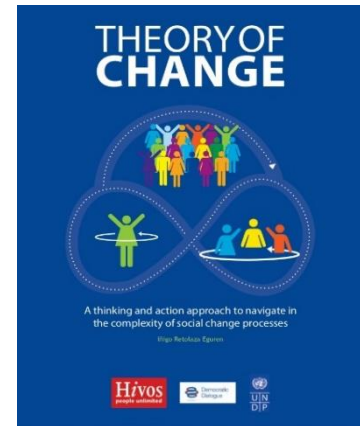
⁴ Core Humanitarian Standard (2015) <http://www.corehumanitarianstandard.org/the-standard>. Accessed 18/11/2016.

⁵ Guardian Global Development Professionals Network (2015) <http://www.theguardian.com/global-development-professionals-network/2015/jun/11/core-humanitarian-standard-do-ngos-need-another-set-of-standards>. Accessed 18/11/2016.

In each of the above it is anticipated that a strategic business case has been identified to develop and implement the L&D framework using the most appropriate tools. If you are an HR or OD manager or involved in line management or programme management, involved in the design and implementation of a framework, the toolkit is designed to be an aid to you in that process.

The impact of this toolkit is anticipated to strengthen the capability and capacity of the organisation by enabling you to deliver:

- An assessment of the humanitarian competencies⁶ desired in your organisation to meet strategic objectives in line with internationally recognised standards.
- An assessment of the learning needs of the workforce.
- The design of a blended learning programme to meet those needs.
- The design of an assessment tool to provide evidence of change and to map progress against the International Development and Humanitarian Training Competency Framework⁷.



These four will provide the basis of a framework for a Learning and Development programme. It is recommended that a manager with experience in Project Design, Organisational Design, Learning and Development and Change Management, where possible, be assigned to lead on this project. Familiarity with the Core Humanitarian Standards, The Humanitarian Competencies and the Humanitarian Training Competency Frameworks documents will be beneficial at the outset.

Lessons learnt by other organisations can inform the effective adoption and embedding of changes in programmatic learning. This toolkit contains some brief examples of cases which will enable you to improve capacity and capability to deliver your organisation's strategic objectives, along with the communities you serve. These are from one small organisation, Retrak, one medium CAFOD and one large sized NGO, The Red Cross. Further case studies can be found on the CHS Alliance website, resources section.

Theory of Change

The same Theory of Change (ToC) model which looks at approaches to complex social change in communities, can be adapted in order to bring about a change in organisational policy and practice. In this case it can support a process to imagine, and describe, the changes in workforce skills and competencies which organisations need to take to bring about real impact on service delivery. In 5 steps the ToC maps a process of bringing about that change, producing a framework for the anticipated potential outcomes, why they are needed, how they can be achieved and how progress and their impact can be monitored. Adopting a theory of change from the planning phase is essential to understanding and supporting a process where the impact of learning initiatives correlates to programme improvement.

⁶ Rutter, L. (2011). Humanitarian Competency framework: Humanitarian Capacity Building throughout the Employee Life Cycle <https://start-network.app.box.com/s/uzr563nqgvv1dv8na94q0bu4i6frul5h> CBHA. Accessed 1/11/2016

⁷ International Development and Humanitarian Training Competency Framework. Red R and Bioforce <http://www.alnap.org/resource/12070>. Accessed 1/11/2016.

Five process steps will be followed throughout this toolkit:

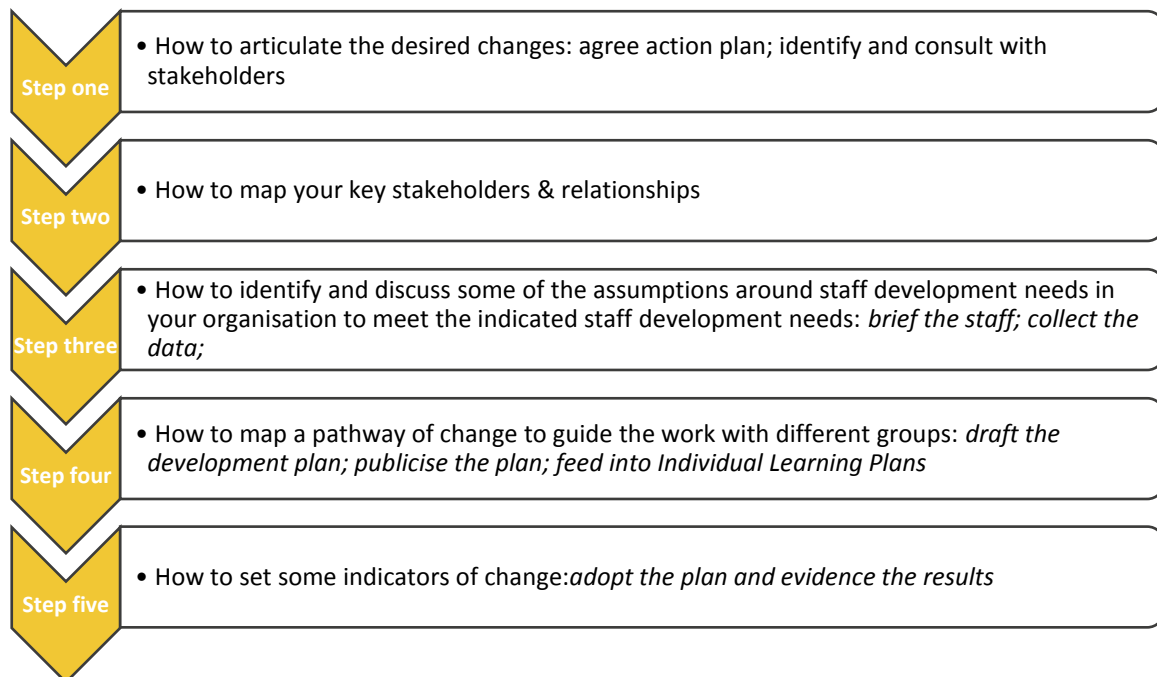


Figure 1 Five Step Theory of Change Process

For most organisations, introducing an L&D framework for the first time, there is an underpinning principle that the **strategic plan sets out a direction of travel, not a static destination, to be aimed for**. The first step in approaching the idea of change is to stop and think about learning & and development in relation to delivering your strategic priorities with the Senior Management Team, building a shared understanding of your strategic goals and objectives, the key issues you are facing and planned organisational growth.

It will include a look at the current staff structure and the ways in which staff learning and development needs are identified, through Country Operational Plans, Monitoring and Evaluation (M&E) reports, performance reviews, annual appraisals, 1:1 supervisions and a possible CHS audit or other audit against a set of recognised standards.

The responsibility of senior management is to act as an agent for change, demonstrating leadership in an environment where increasing demands mean a need to continually respond to change. Their role is to model and lead the organisation to identify, manage and sustain aspirations.

This leads to drafting the action plan and an output planning document or Gantt chart (see **Appendix 1**) setting out how the whole process will be conducted, who will be involved, the number of employees involved and how they will be consulted, the methods of collecting and analysing information, and the timescales for the project. This briefing should include information on the strategic background and need, the purpose of the individual, team and organisational Learning Needs Analysis and the purpose of the Organisational Learning & Development programme. This should be an open process which provides reassurance and gains staff commitment and confidence in a way that **does not raise unrealistic expectations about what it can deliver**.

Step 1 – Articulate the desired changes

The Theory of Change in this paper addresses the long term development need to build the required knowledge, skills and behaviours within the organisation. This includes an initial organisational gap analysis with recommendations to identify the shift that is needed from where your organisation is at now, to where it wants to be and the means to achieve it.

Whichever model of learning is used to devise a long term staff development plan, core areas of learning, as well as a range of technical and support skills, are often identified:

- achieving excellent results for beneficiaries/beneficiaries
- understanding the organisation's context and legislative framework
- getting the best out of people
- resource management
- communication
- strategic thinking and creativity

CAFOD recently undertook the design and development of a People Framework, very clearly articulating at the outset their desired changes.



Developing the CAFOD People Framework: meeting staff development needs for 2020.

CAFOD's leaders share a vision, and have goals, to bring hope and compassion to poor communities, standing side by side with them to end poverty and injustice.

Following review in 2014, CAFOD began an organisational change process in order to bring about the necessary transformation identified through stakeholder research, to realise that vision.

As part of developing the People Framework, a refocused learning function was established with part of their programme to address new ways of working. CAFOD plans to address core areas of learning, leading to the delivery of People Excellence (the 'doing' part); Organisational Excellence ('doing it well') and Strategic Excellence ('making an impact').

A recent project was undertaken to evaluate the long-term learning needs of staff and managers, and to present a strategic alignment of the staff development programme content with business objectives. The process of conducting the research was in itself one of many steps in delivering that excellence.

Step 2 – Map stakeholders and relationships

Your organisation is likely to have a range of centralised services provided by the headquarters and may include HR, Payroll, Advocacy, Volunteer management, Marketing, Fundraising, IT, Finance, Quality and Risk Management. Learning and Development as a function may be new or not yet exist. If developed as a distinct discipline, its function is likely to be:

1. Coordination of organisational training including compliance and some professional development. This also includes recording and reporting responsibilities. Development of learning delivery infrastructure which may include intranet and/or an online learning platform.
2. Developing policies and procedures to create a learning culture that, in turn, creates a sustainable organisation.
3. Delivering some training modules.
4. Holding and managing some or all of the L & D budget.

As your organisation works to improve the lives of its beneficiaries throughout the programmes, the countries beyond HQ and often local partners are fundamental to service delivery. Understanding the range of stakeholders (Figure 1) involved by using a mapping tool such as a power-interest stakeholder matrix (See **Appendix 2**) is key to the design and implementation of any new L & D plan.

Power Interest

Power interest stakeholder matrix	
Ask: “Who should we keep satisfied?” e.g. Training providers, regulatory bodies	Ask: “Who do we need to manage closely?” e.g. Line managers; staff; partners
Ask: Who do we monitor? e.g. Country Reps (n.b. this may also need to be in the ‘manage closely’ section, depending on capacity/capability once inducted into the programme).	Ask: Who do we need to keep informed e.g. The Board of Trustees; Relevant donors; suppliers

Figure 2 Power Interest Stakeholder Matrix

Delegation

The R.A.C.I. matrix (Figure 2) may be used to identify levels of responsibility for the activity. The result of carrying out an R.A.C.I. analysis is a matrix (see **Appendix 3**) with activities or tasks along one axis and the names of teams or individuals or on the other axis.



Activity/Task	Expert Witness	Case Manager	Consultant
	R	A	A
	I	A	R
	I	R	C

Figure 3 R.A.C.I. Matrix

Step 3 – Identify the staff development needs

In this part of the process, you will identify the knowledge, skills and competencies that are not currently present in the organisation and ascertain where training, coaching, or recruitment into the organisation are the routes to address skills gaps, practice changes required and the potential to build on existing key strengths. Data will be gathered for organisation, team/functional and individual levels.

Why do a skills audit?

The information collected throughout a skills audit can be used to:

1. Plan a fully integrated blended learning programme with mandatory, induction and training courses, opportunities to meet required continuous professional development requirements, electives, a management and leadership development programme and impact effectiveness tracking. The plan will also list possible methods of delivery, learning platforms and training providers, access to communities of practice and learning networks or forums. It will include timescales and will inform your annual training budget.
2. Inform Personal Development Plans and help make training & other learning opportunities systematic.
3. Support L&D budget Return On Investment and ensure that the impact of the learning is evaluated.
4. Demonstrate externally that you are considering your staff and can maximise their overall effectiveness.
5. As part of informing a non-monetary reward scheme to improve morale & motivation.
6. Feed into further career opportunities.

Key to understanding some of the major stakeholders when designing an L&D framework is to identify the prevalent learning styles among different groups of the workforce.

One simple framework, for example, Honey and Mumford's model, Learning Styles Questionnaire (2006), which is derived from Kolb's theory (2004), identifies four:

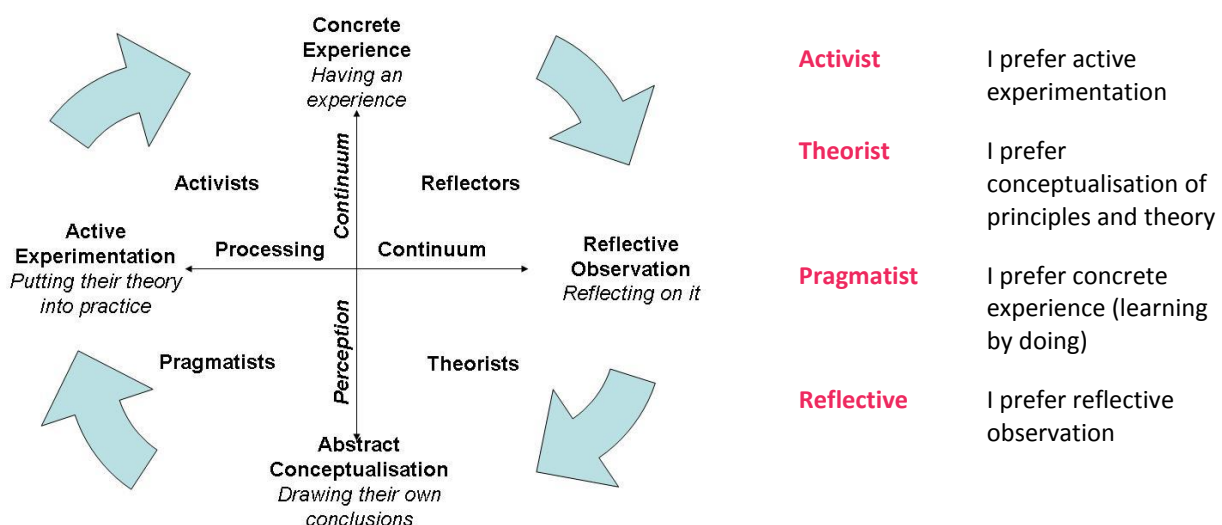


Figure 4 Honey and Mumford (2006) Learning Styles

Mini case study

Understanding learning styles enables you to develop a programme that maximises the accessibility to learning opportunities for all employees. The Red Cross Red Crescent Learning Platform has been developed as ‘a global yet local online learning community. It consists of **hundreds** of short, free, high quality, self-directed, multilingual Red Cross Red Crescent courses covering both programmatic as well as support focused functions and activities as well as professional and personal development.’⁸

Including links to open access training where modules are relevant, allows you to structure content of your L&D programme to suit the learners you are supporting in the context within which they operate.



Learning Academy

In 2015 a completely new approach to organisational learning and professional development for the IFRC was developed. This was showcased at one of the CHS Alliance Learning and Development Network meetings in the UK.

“By embracing the 70:20:10 concept through an academy model we can provide learning of a higher quality, reduced cost and increased efficiency.

An academy model is all about service excellence: bringing learning, information, communities of practice and reflection together, in one place, which people can easily access and contribute to. It includes policy, procedure, guidance, external links, forums, user generated and rated content, WebEx sessions and videos via our own Intranet.

Some key features are:

- Embedded Learning based on identified business needs
- Learning that is ‘just enough, just in time and just for me’ with mobile options ‘anytime, anywhere and any device’.
- Learning (career) pathways clarity & purpose
- A programme that enables workforce planning
- Encouraging people to manage their own learning
- Using tutors wisely to influence the quality of service”

Users can log onto the IFRC On Line Learning platform at www.ifrc.org/learning-platform

Dominic Fry, Head of Learning and Development, British Red Cross

⁸ International Federation of the Red Cross (2016). Learning Platform <http://www.ifrc.org/en/get-involved/learning-education-training/learning-platform1/>. Accessed 1/11/2016.

Gathering Data and Data Analysis

Questions to ask using an online survey and during face to face interviews

Design a combined exploratory qualitative and quantitative analysis approach using purposive sampling (Denscombe 2007, p17) of a range of employees-staff and managers- as the respondents. The concepts, that is the building blocks of theory around which your organisational research is designed, should be those represented in the organisation's strategic plan, and within that, the HR strategy and workforce planning documents. A design for either a paper or electronic survey is suggested in **Appendix 3**.

The initial indicators, which begin to provide a measure of the concepts, can be derived from discussing previously observed behaviours by the senior managers briefing the project manager.

A suggested semi structured electronic survey, for example using an online tool such as 'Survey Monkey' or 'Question Proplus', and conversations recorded in 1:1 interviews or focus group style semi structured interviews can be carried out. Where possible all respondents should be asked the same questions to elicit detailed response. The results of interviews can be recorded in a variety of ways depending on the resources available and later entered on a simple spreadsheet. Core themes are then highlighted from the responses and coded or grouped. These results should then be explored with senior management.

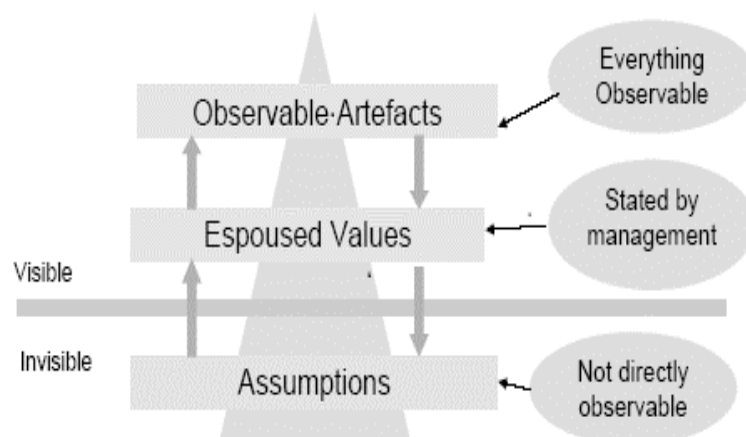


Figure 5 Edgar Schein: Measuring organisational culture

The purpose of the face to face interviews is threefold:

- To triangulate meaning and clarify where a response was unclear.
- To probe issues more deeply that pertained to previously identified issues.
- To hear directly from respondents which issues most concerned them.

Themes

A number of themes will emerge from the interviews, from L&D literature and from the briefing. A useful underpinning theory is **Edgar Schein's** framework relating organisational culture, leadership and values comprising: Artefacts; Espoused values; Principles and Practices; Basic Assumptions.

Themes will emerge, for example around 'Leadership and Management' Doug Crawford (2015) in his paper 'Performance Management is Killing your Business', comments that *'The rapidly changing environment in which organisations operate has profound implications across all sectors, requiring a fundamental reappraisal of many of the leadership and organisational practices that have served them well in the past'*.

The next step of analysis of the results is to determine where the organisational, team and staff performance development needs lie. This requires comparing the skills, knowledge and competencies which will be needed to achieve the organisation's strategic objectives with those of the current workforce. A competency framework will aid this, see **Appendix 4** to understand the role of a competency framework in performance development. **This process identifies the gaps between what is needed and what is there.** It then goes on to identify which of these gaps can be met through training and other forms of learning within the organisation. The training and learning needs should be recorded in the Organisational Learning & Development Plan, see **Appendix 5**. This plan is then used to make decisions on overall training requirements and enable agreement and decision making about funding priorities through a Business Planning Process.

Once this stage is reached, it is essential to publicise the Organisational Learning & Development Plan to all stakeholders and feedback Individual Learning Plans or Personal Development Plans.

This feedback can be done through existing channels of communication, for example staff meetings or 'town meetings', a staff email newsletter (printed or electronic and translated where necessary), staff noticeboards or via your intranet if you have one.

Individual Learning Plans can be prepared and fed back through existing supervision or appraisal processes and agreed so each member of staff has identified their individual learning needs and is involved in responding in ways that can be addressed through agreed training or other learning methods.

Please note: learning takes place in a variety of ways. The organisation does not commit to providing learning opportunities only by expensive training courses. Depending on need, and level of responsibility within the organisation, staff will be able to access other opportunities to learn in the following ways:

- peer learning/training by other experts
- action learning sets
- learning by doing
- staff interchange and secondment
- visiting other work sites/shadowing
- project work
- mentoring and coaching
- reading, literature and file review
- preparation/delivery of lunchtime talks
- attendance at conferences
- access to on-line learning platforms, either organised internally or with external suppliers
- access to communities of practice, learning networks or forums

The toolkit, Tools for Knowledge and Learning (Ramalingam 2006), expands on many of these and other ideas for overall organisational learning.

Shaping Programme delivery skills: Core Competencies. Respondents can be asked in different ways to identify desired competencies for the organisation going forward. This is indicated on the Learning and Development staff survey template **Appendix 6**.

Step 4 – Map a pathway of change to guide the work with different groups

Ideally, at this stage of the process, the findings would now go back to the target audience, i.e. the group interviewed and to the senior management to validate the concepts and the indicators. This will identify if the overall findings resonate with them, are identified with what they generally wanted to be represented and if those findings raise any major surprises. All contributing respondents should be assured that they will receive a general feedback report based on the findings, and it is expected that this will form part of an engagement process for a pilot phase of the new L&D programme.

Detailed comments should be included in the documentation and recording of interviews, close reading of which should support the planning process for the implementation of the new Learning and Development programme.

The key components of a Learning and Development framework, (see below and **Appendix 6**) can be adopted following the team and individual Learning Needs Analysis. Once the desired skills or competencies have been identified for any one individual or team, the appropriate responses can be agreed upon. The plan will focus on the need to teach, train, coach or mentor in order to develop and to embed those skill or competencies.

Part of the development programme comprises training and practice in coaching skills (the basic **GROW** model (Whitmore, 2010) is sufficient for most purposes) for all line managers as this gives a structure for crucial conversations and developing decision making skills.



Figure 6 Grow Coaching Model for Crucial Conversations

Monitoring and Evaluation: Adopting tools for Learning & Development impact evaluation

The implementation of an organisational Learning & Development Plan must be reviewed and monitored to ensure that the activities identified are delivered within the organisation to the required standards. The information generated in this way can be used to develop and improve the plan over the delivery period. Senior Managers should also undertake to evaluate the effectiveness of learning and development initiatives to ensure all involved are satisfied with the outcomes.

Your Senior Management Team should assess the impact of staff development on organisational effectiveness at meeting strategic priorities. Progress against the Organisational Learning & Development Plan can be reported to the Board as required.

The results of evaluation and progress against the Plan should be used to inform the strategic planning process for the following year, therefore ensuring the cycle is repeated and that staff development is aligned with the organisation's strategic needs and is embedded as an ongoing and live process.

Two additional tools, see **Appendix 7** and **Appendix 8** which can be used to support both 1:1 discussions between line manager and staff members and for management team planning are:

- Conscious Competence matrix: "People develop competence only after they recognise the relevance of their own incompetence in the skill concerned." (Business Balls 2015).
- Nine box performance/potential matrix⁹.

In parallel, reviewing the Performance Management system would support a move from compliance to a learning process through towards commitment to accountability for ownership of individual and organisational performance. A conversation can be held around the following simple statements during a 1:1 session, and can be recorded within the M&E recording process. The Performance Management Cycle illustrates the place of those conversations (Figure 7).

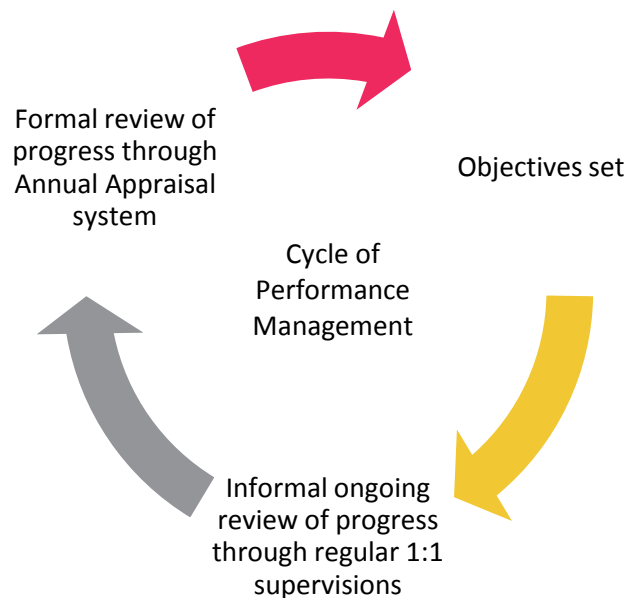


Figure 7 Performance Management Cycle

In step 5 (page 14), guidance notes are given for a Learning Event Review tool to be used as part of the 1:1 staff supervision process. See also **Appendix 9**.

This is derived from a simple model of evaluation, assuming correlation rather than proven cause and effect, known as Kirkpatrick's 4 level model. In addition the following distinctions can be made for the level of the impact of learning anticipated:

- | | |
|---|--|
| A - Aware (I know what this is) | D - Distinguished (others look to me for input on this) |
| B - Basic (I can do this with support) | E - Expert (I write/speak on this externally) |
| C - Competent (I can do this well in my own job) | |

⁹ Various attributed to/claimed/adapted by Boston Consulting Group, George Odiome, Jack Welch, Doug Stewart, and Nicholas Barnes, c.1970-1996.

The above focuses on the individual who took part and preparing early on in the process for the evaluation which comes at the end, in order that baseline impressions are captured and ongoing recording of learning. Further details are listed in section 5. Other issues to consider are:

1. What significant organisational resources do you need to commit to the Learning and development Planning initiative for it to have an impact?
2. Is Learning and Development counter cultural and are you measuring the same things in different countries? Are different things valued? **N.B.** The stronger the link between L&D interventions and desired learning outcomes at the planning stage, the easier it will be to evaluate afterwards.

It is important that managers and the senior leadership team embrace the need to adopt appropriate staff development methods and opportunities. Traditional workshops with a mix of transmissive and transformative learning will not always meet all learning needs, especially if there is no correlation between the identified business needs and what is actually offered and the expressed needs of the learners. A blended learning approach of workshops, online learning, social media tools, coaching and mentoring, shadowing and secondment, inter-partner exchange and networking, peer to peer learning, project work, case studies, access to communities of practice, literature review and conference attendance is required. A systematic process for sharing learning should be inherent in the programme and the in-house expertise of current staff and managers exploited to greater effect than outside consultants or service providers. It relies on staff and managers ascertaining which skills and competencies need to be developed (see Skills Gap analysis, Conscious Competence Matrix and 9 box performance/potential matrix).

“Transmissive learning – whatever the medium – remains the dominant mode of formal learning in the humanitarian context, even though everyone knows patently that such an approach is both ineffective and irrelevant when it comes to teaching and learning the critical thinking skills that are needed to deliver results and, even more crucially, to see around the corner of the next challenge. Such approaches do not foster collaborative leadership and team work, do not provide experience, and do not confront the learner with complexity. In other words, they fail to do anything of relevance to improved preparedness and performance.” Saki (2015).



Figure 8 ADKAR Model

Step 5 – Set some indicators of change

Next steps

1. For validation of the initial research, your findings need to be reviewed, and may be facilitated in a workshop setting with some of the managers interviewed, and senior managers to validate analysis/themes and review implications and recommendations.
2. Identify champions within the organisation to lead on this project with HR L&D department
3. It is recommended that individual respondents are encouraged to develop their strengths rather than to focus on their weaknesses. In a balanced team this will prove to be more effective in the medium and long term. It may be worth investing in a process of assessment such as Strengths Finder for key managers and team leaders. <http://www.strengthsfinder.com>
4. Cascade of learning: address how respondents will share knowledge within the wider organisation (note: it may be necessary to resource staff better to do this e.g. ‘train the trainer’ workshops).
5. Link individual Learning Needs Analysis to team and organisation development.
6. Focus on the priority topics and the learning tools most appropriate for that delivery.
7. Set out an action plan with milestones and identified personnel responsible for deployment of activities in the pilot project.
8. Agree a governance protocol: who monitors the pilot progress, its effectiveness and who will make the decisions regarding review, adaptations and full implementation following the pilot.
9. Draft a framework for identifying what would indicate success of the programme. This point is expanded with some suggestions below.

Any engagement with a new Learning and Development framework (**Appendix 10**) and the ensuing programme needs to be driven by your organisation’s strategic objectives, team needs and individual personal development plans. Commercial organisations exist to support you if there is insufficient in-house capacity to carry this out. One example is the **Harvard ManageMentor¹⁰** programme which has a variety of levels of access to its blended learning programmes. It is important to ensure that the impact of the programme, in which there has been a considerable investment of resources, can be measured. A change management approach may be also needed to implement a new staff development model and its accompanying evaluation programme - e.g. the **ADKAR** model of **raising awareness, creating desire, increasing knowledge**, assessing ability to change and **reinforcement** of the new approach.

Frontline managers might benefit from the adoption of a strategic management approach to support the planning, launch and implementation with a range of simple accessible tools which may build on what many managers already do in practice:

Through regular one to one meetings with the line manager, each respondent in the programme might follow a series of simple measures:

1. Before any learning event: identify what does the respondent hope to get out of it; how do they anticipate it will benefit the organisation and themselves.

¹⁰ 'ManageMentor is a site-licensed training programme designed for, and used mostly by, large corporations and organisations. Specific ManageMentor support is accessed via <http://www.harvardbusiness.org/harvard-managemmentor> and is a fee based management support service. The example given in Appendix 10 demonstrates a type of framework that can be developed by an organisation of any size.

2. During/immediately after any learning event: something more useful than the usual 'happy sheet' e.g. what actions have been planned for putting the new knowledge or skills into practice; what will the respondent do differently.
3. Short term impact: 3-6 months after completion have the actions identified in '2' been achieved? If not why not? What difference has it made in terms of overall learning objective? How has it addressed business needs, team or organisational objectives?
4. Longer term impact: 6-12 months as above.
5. In a recorded one to one discussion, use a very simple model of evaluation e.g. Kirkpatrick's 4 level model (you may need to be satisfied with correlation rather than actual cause and effect):
 - customer satisfaction
 - evidence of learning
 - behavioural change in the real work environment
 - resulting business benefit (back to needing a process for identifying this benefit).
6. Progression and development of capability may be mapped throughout the length of the programme and duration of the manager's term of office, recording both personal reflection and the line manager's observation. A 360° review can also be carried out as part of the annual appraisal process. For areas of challenge, a coach may be assigned.
7. For highly skilled staff, where it is important to retain them in the organisation if they are not destined for the career progression by means of the management track, an alternative career path may be chosen. An inverted T shaped approach may be used, stretching their specific skills to use them to benefit others and special projects or secondments may be appropriate.

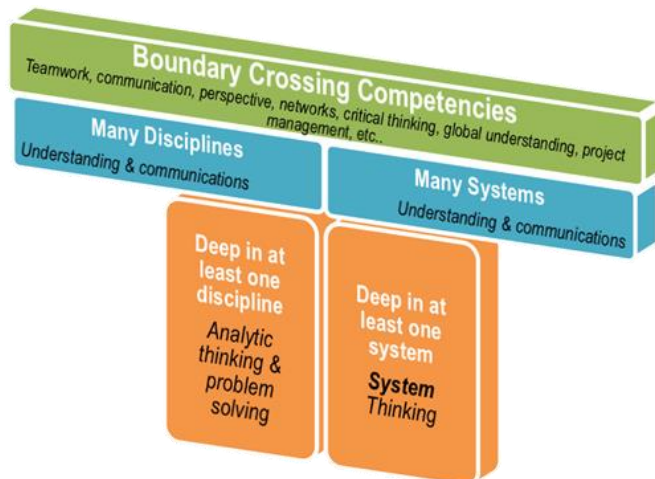


Figure 9 T-shaped learning

NB The stronger the link between L&D interventions and desired learning outcomes at the planning stage, the easier it will be to evaluate afterwards. Ensure that competencies are linked at the same time and that as an organisation you are prepared to practice double loop learning, continually revising, applying and evaluating every change made. Argyris and Schon (1978) defined double loop learning as "when error is detected and corrected in ways that involve the modification of an organization's underlying norms, policies and objectives."

8. Respondents may be asked to carry out a longitudinal case study throughout the programme to apply the various areas of learning (new and improved skills, competencies and improved capability). This can be accompanied by a mentoring programme.
9. Use of Action Learning Sets.
10. The process for dialogue needs to have a very practical basis. Where regular one to ones are difficult because the line manager is not co-located, a simple weekly email bulletin can be very effective at encouraging full engagement and getting a measure of effectiveness of the programme. For individual learning interventions, asking core questions is often sufficient: what are the changes we hope to see? Where are we now? What will help get us there? Is it working?

Friday bullet points

Date: **Name:**

1. Past week: 5 priorities I worked on.
2. Next week: 5 priorities I plan to work on.
3. What would I have done differently this past week?
4. What have I learnt?
5. What was successful in my team?
6. What support do I need?

The use of this simple tool, known as 'Friday bullets', is just one of the ways in which a small NGO, Retrak, managed communication and accountability for learning between staff and managers who may be separated by boundaries of time, distance and culture.



Staff development programme

Retrak is a small INGO working with street children. In 2008 the new CEO set out to professionalise a number of support services, committed Retrak to moving 'From Good to Great'. This resulted in a staff development programme well ahead of its time for an organisation with a then income level of £300,000.

While transactional HR work was carried out by line managers, the role of Learning and Development Director was created and investment made into staff development, with a range of initiatives:

- baseline Learning Needs Analysis; organisational health check; Investors in People; People In Aid certification ; BOND healthcheck
- ensuring that L&D was a feature of the annual programme planning cycle
- shadowing opportunities; encouraging directors to take Trustee positions as a learning opportunity in other charities; commissioning original research by key staff members; devising training modules for other organisations on aspects of the social work
- an emphasis on accountability through a dynamic supervision process with Personal Development Plans for all staff
- an internship programme for graduates with MA in development or related studies
- an M&E process to record the impact of learning interventions on project targets
- a blended learning programme with equity of access by HQ, programme and partner staff
- learning opportunity access extended to partners
- directors being trained on ROI principles.

"By investing in competent (and dedicated) staff, designing and implementing high quality programmes, Retrak has now taken the position of one of the leading global organisations in their field"

Marcus Holmgren, Läkarmissonen. (Retrak annual review 2014).

What is good enough?

Accountability is a key feature in the Core Humanitarian Standards. The guidance notes and indicators are a helpful reference tool for identifying your own indicators of change. The Humanitarian Competencies Framework will also provide a series of descriptors which will allow you to assess the impact of the changes which your Learning and Development initiative has brought about. These two documents should be the foundations on which to build your framework.

If you have the capacity to access and adopt additional tools, the Mark Friedman **Results based accountability** framework can provide a basis for the monitoring and evaluation (M&E) of this kind of activity in the sector, by asking three simple questions:

- How much did we do?
- How well did we do it?
- Is anyone better off?

In the CHS Alliance **resources** section, a paper is available to download which describes a sample of HR impact metrics tools, with examples of how to use them for providing evidence of the impact of an HR or L & D intervention. This starts to address the challenge of identifying language, indicators, tools and templates to be used in reporting what may be seen as soft outcomes. Any process for monitoring these outcomes must be modelled from the top of the organisation, and line managers need to be capable of applying the processes and committed to its success.

Glossary of terms

CHS	Core Humanitarian Standard
DEPP	Disaster and Emergencies Preparedness Programme
HR	Human resources
KPIs	Key Performance Indicators
L&D	Learning and Development
LNA	Learning Needs Analysis
OD	Organisational Development
PIA	People In Aid (now CHS Alliance)
PDP	Personal Development Plan
PMS	Performance Management System
ROI	Return on investment
ToC	Theory of Change
TNA	Training Needs Analysis

Appendices

1. Example of an output planning document
2. Power Interest stakeholder matrix template
3. R.A.C.I. template
4. Competency Framework
5. Learning Needs Analysis process template
6. Learning and Development Staff Survey template
 - a. Template for scheduling face to face interviews
 - b. Introductory letter Electronic Survey
 - c. Thank you letter for completing the Electronic Survey
7. Conscious Competence matrix
8. Nine box performance/potential matrix
9. Learning Event Review tool
10. Staff development Framework
11. Results Chain Evidence tool.

Appendix 1

Example of an output planning document from the CAFOD case study

CAFOD People Framework Output		Prep.	Month 1	Month 2	Month 3	Month 4	Month 5	Follow up
Project Aim: as part of the People Framework project address the longer term development of required skills and behaviours across CAFOD to achieve the Strategic Intent								
Objective 1 A well planned project to prepare for collection of data								
1:1	Project Proposal							
1:2	Analysis of all literature to date							
1:3	Short theory of change paper							
1:4	Gantt planning							
1:5	Questionnaire design							
1:5	Stakeholder analysis & R.A,C.I.							
Objective 2 Collection and analysis of data (quantitative and qualitative to understand the current situation by identifying gaps in skills, knowledge and behaviours required to achieve the Strategic Intent								
2:1	Understand current situation							
2:3	Identify gaps in competencies							
2:6	Review performance management							
Objective 3 Working with the CAFOD L&D team, provide a learning framework to address those gaps								
3:1	Design blended learning program							
Objective 4 A Monitoring & Evaluation process that will report evidence of the People Framework impact and meets organisational requirements								
4:1	Prepare M&E assessment tool							
4:2	Begin initial trials of M&E process							

Appendix 2

Power interest stakeholder matrix template	
<i>Keep satisfied</i>	<i>Manage closely</i>
Monitor	Keep informed

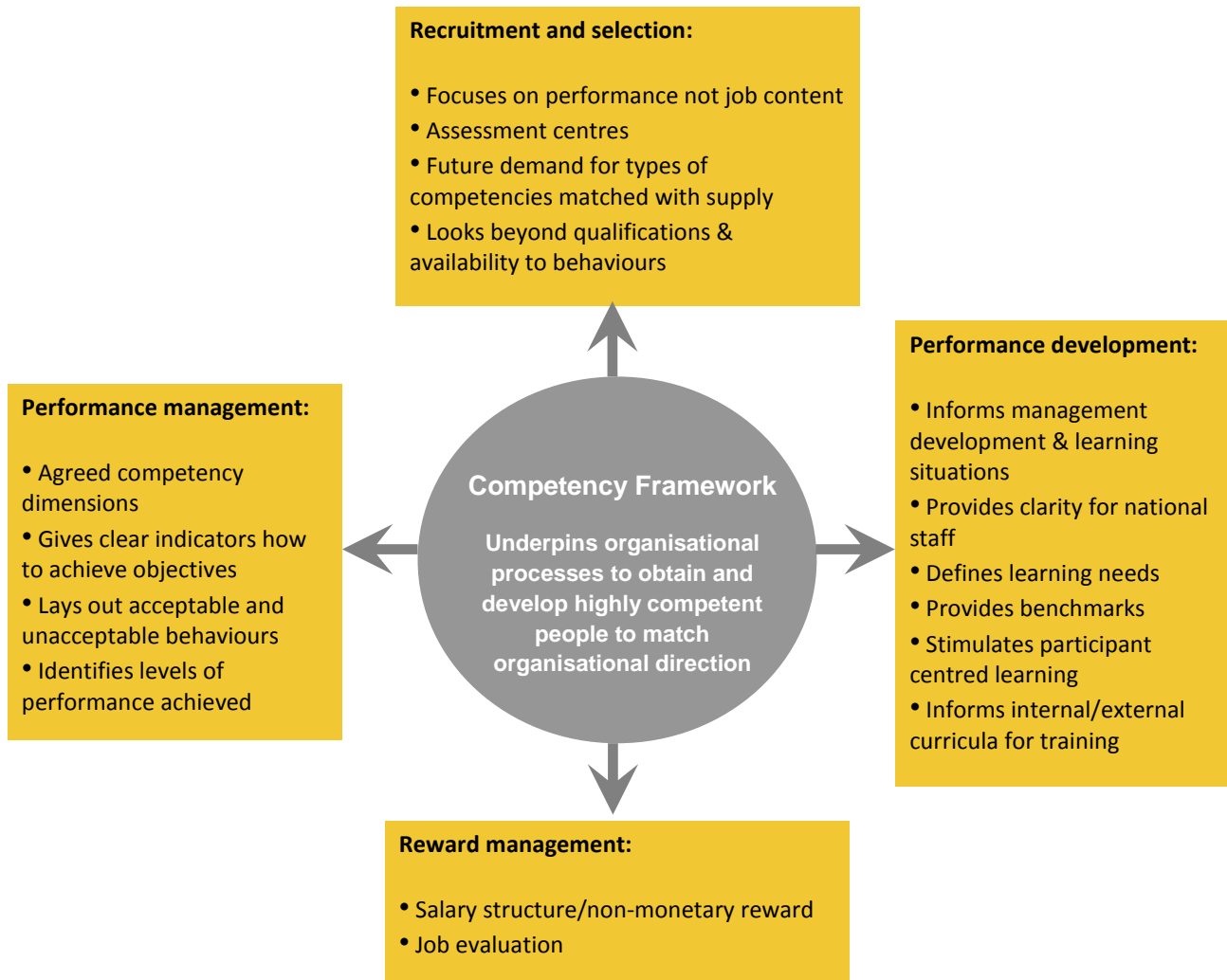
Appendix 3 - R.A.C.I. template



Activity/Task	Name/Role	Name/Role	Name/Role

Appendix 4

The place of a competency framework in Performance Development



Appendix 5

Learning Needs Analysis process template

Part 1

To be carried out in Senior Management meeting/by
email/taken from Annual Operations Plan.

Date:

1.	What are the key issues facing <i>xx organisation</i> over the next <i>number</i> years & how have they been identified?
2.	How do we see issues linking to impact indicators and strategic objectives? Does <i>xx organisation</i> need to change? If so in what ways?
3.	What impact are these issues going to have on our staff and organisational planning?
4.	How many staff are affected? What roles do they hold and where are they based?

5.	Have you identified any training or development activities that are preferred or essential to achieve your organisational objectives? If so what are they?
6.	When must these activities be undertaken? What are the timescales?
7.	In which functions are there legal continuous professional development requirements?
8.	Outcomes and Return on Investment – What are the measures we will use to evaluate impact of Learning & Development interventions?

Part 2 - Action Plan and Checklist

	Activity	Who	When
1.	Organisational Assessment and Strategic Overview been completed and recorded on Part 1		
2.	Current Organisational Staff Structure Chart Provided		
3.	Total number of employees? List of staff names provided? Current line managers.		
4.	Current job descriptions and person specs		
5.	Identify method of data collection to be used for the preparation of the Organisational Learning & Development Plan? <ul style="list-style-type: none"> • Performance review records/staff appraisals/1:1 supervisions/review of employee survey/SM action plan/HR audit action plan/CPD requirements • Team Learning Needs Analysis • Individual LNAs 		
6.	Performance review/staff appraisal records provided		
7.	Briefing to outline the purpose of LNA and/or Organisational Planning, the methodology to be adopted, timetable of activities for presentation to management and staff. Date for briefing managers and staff: presentation and SKYPE		
8.	Date for team Learning Needs Analysis Name of manager and location Issued to local Board chair, Senior Management Team members, Country Directors as required.		In line with Business Planning Organisational Development Plan
9.	Date (s) of Individual LNAs and venue - during 1:1 supervisions, Field sites or local office as appropriate		
10.	Date for Organisational Learning Needs Analysis Data input and collation Analysis		
11.	Draft Organisational Learning & Development Plan to be prepared When will the Organisational Learning & Development Plan be available for discussion and agreement? Who will identify training providers? Presentation of Organisational Learning & Development Plan to the Board for agreement		

12.	Closure and feedback meeting for senior managers		
13.	Publication of Organisational Learning & Development Plan		
14.	Individual Personal Development Plans Date of issue Dates for updates of Appraisal Records		

For the timeframe it is helpful to create a Gantt chart. With the information from the R.A.C.I. exercise this enables a workplan to be created. Appendix

Part 3 - Individual staff member

See survey questionnaire on spreadsheet, **Appendix 6**

Part 4 - Personal Development Plan or Individual Learning Plan

This is about individuals looking forward and planning for the future *n.b. start to draft this immediately but only complete when organisational and team analysis done*

Agreed Training Need	What activities will be undertaken to achieve this?	What resources or support will be needed?	What will the success criteria, objectives or outcomes be?	Target dates for review and completion

Signature of staff member:

Date :

.....

.....

Interviewer:

Date :

.....

Part 5 - Team or Function Training Needs Analysis

This can be completed in a team planning session on the basis of the results of the survey

Name of team leader:			
Team:			
1.	What are the general issues facing the team?		
2.	What are the team objectives?		
3.	What new systems, processes, equipment, knowledge or skills are required in the team to deliver the objectives?		
4.	What training needs have been identified for the team?		
Confirmation of Current Duties			*Delete as appropriate
3.	Do all staff have a current job description? (see attached staff list)	Yes*	No*
4.	Do they accurately describe the jobs to be undertaken?	Yes*	No*
5.A	If no, what extra duties or changes do you need to be added?		

5.B	What duties are no longer required and can be deleted from the job descriptions?

Training Needs	
6.	To perform effectively as a team: What training or learning do you still need to access to ensure competency and achieve your objectives
7.	How could this be provided?
8.	Please identify any elements essential for a rolling programme of mandatory training
9.	Considering the development of the team and team objectives, do you have plans in place to develop your staff with future promotions and opportunities? What, if any, succession planning and career planning exists?

10. Have you identified individuals with potential who could progress? In order for them to progress have training needs been identified?

--

Future Development Needs

10. What future organisational developments may impact on the team?

--

11. What training or development may you need to help make this happen?

--

Signature of team leader:

Date :

.....

.....

Interviewer:

Date :

.....

.....

Part 6 - Team Development Plan

Team: Completed by: Responsibility: Date:

Name	Identified learning need	Required outcomes	Proposed method of delivery	Agreement Y/N	Date required

Part 7 - Organisational Learning & Development Plan

Level	Name	Type of training or development required	Responsibility for delivery	Proposed delivery method	Numbers requiring training or development	Budget or funds available	Date scheduled	Date to be completed	Records updated
Strategic or Organisational									
Board									
Team or Functional									
Individual									

Part 8 - Funding opportunities

To be completed by your fundraising team.

Appendix 6

Learning and Development Staff Survey Template: see separate Excel spreadsheet

Appendix 6A template for scheduling face to face interviews

Developing the name of organisation L&D Framework: name of country/team interview schedule date

Name		Office	Role	Email contact	Interview date	Local Time	Venue
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							

Appendix 6b

Introductory letter for Electronic survey

Hello,

Name of organisation is currently looking to build a Learning and Development framework to enable the workforce to efficiently and effectively meet current and future strategic objectives. xxxxxx the right culture, skills and behaviours.

In the following survey please share your thoughts and ideas on the kind of Learning and Development needs *name of organisation* should be focusing on over the next 3 years to help deliver the strategic plan. In preparation you need to read or re - familiarise yourself with the overall strategic plan and the targets, objectives or Key Performance Indicators for you and your team.

Thank you in advance for your valuable insights. Your input will be used to ensure that your learning needs continue to be met.

Please click on this link to complete the survey:

Start Survey

If you have any questions, please contact *name of consultant or staff member leading the project with email address*

Thank you and kind regards,

Name.

Appendix 6c

Thank you letter for completing the Electronic survey

Thank you for completing this questionnaire. You will be sent a meeting date (virtual or actual), time and venue to discuss the contents. Your contribution will impact staff development within *name of organisation* meet future demands.

If you have any questions please do not hesitate to contact me on *name of consultant or staff member leading the project*.

Name.

Appendix 7

Conscious Competence matrix

	competence	incompetence
conscious	3 - conscious competence <ul style="list-style-type: none"> the person achieves 'conscious competence' in a skill when they can perform it reliably at will the person will need to concentrate and think in order to perform the skill the person can perform the skill without assistance the person will not reliably perform the skill unless thinking about it - the skill is not yet 'second nature' or 'automatic' the person should be able to demonstrate the skill to another, but is unlikely to be able to teach it well to another person the person should ideally continue to practise the new skill, and if appropriate commit to becoming 'unconsciously competent' at the new skill practice is the single most effective way to move from stage 3 to 4 	2 - conscious incompetence <ul style="list-style-type: none"> the person becomes aware of the existence and relevance of the skill the person is therefore also aware of their deficiency in this area, ideally by attempting or trying to use the skill the person realises that by improving their skill or ability in this area their effectiveness will improve ideally the person has a measure of the extent of their deficiency in the relevant skill, and a measure of what level of skill is required for their own competence the person ideally makes a commitment to learn and practice the new skill, and to move to the 'conscious competence' stage
unconscious	4 - unconscious competence <ul style="list-style-type: none"> the skill becomes so practised that it enters the unconscious parts of the brain - it becomes 'second nature' common examples are driving, sports activities, typing, manual dexterity tasks, listening and communicating it becomes possible for certain skills to be performed while doing something else, for example, knitting while reading a book the person might now be able to teach others in the skill concerned, although after some time of being unconsciously competent the person might actually have difficulty in explaining exactly how they do it - the skill has become largely instinctual this arguably gives rise to the need for long-standing unconscious competence to be checked periodically against new standards 	1 - unconscious incompetence <ul style="list-style-type: none"> the person is not aware of the existence or relevance of the skill area the person is not aware that they have a particular deficiency in the area concerned the person might deny the relevance or usefulness of the new skill the person must become conscious of their incompetence before development of the new skill or learning can begin the aim of the trainee or learner and the trainer or teacher is to move the person into the 'conscious competence' stage, by demonstrating the skill or ability and the benefit that it will bring to the person's effectiveness

Appendix 8

Nine Box Performance/Potential matrix

	Low potential	High potential
High performance	<p>backbone</p> <p>high performance low potential Acknowledge effort and contribution. Utilize as coaches and mentors.</p> <p>Look for each person's hidden high potential, undiscovered passions, etc., and offer new challenges and responsibilities as appropriate, so these people too can be stars, to any extent they are comfortable.</p>	<p>stars</p> <p>high performance high potential Agree challenging stretching work, projects, career development, responsibilities, or these people are likely to leave.</p> <p>Give appropriately stretching coaching, mentoring, training.</p> <p>Explore and encourage leadership and role-model opportunities, to set and raise standards of other staff.</p>
Low performance	<p>icebergs</p> <p>low performance low potential Counsel, build trust, understand issues.</p> <p>Identify hidden potential.</p> <p>Facilitate more fitting roles, direction, purpose, opportunities, etc., linked with and perhaps dependent on performance improvement.</p> <p>Failing this, assist or enable move out of organization if best for all concerned.</p>	<p>problem children</p> <p>low performance high potential Confirm and acknowledge potential.</p> <p>Counsel, build trust, understand issues.</p> <p>Explore and agree ways to utilize and develop identified potential via fitting tasks and responsibilities, linked with and perhaps dependent on performance improvement.</p> <p>Explore attachment to backbone or star mentors and coaches.</p>

Appendix 9

Learning Event Review template

Learning event evaluation form

Learning Event:

Date:

Name:

Job Title :

Line Manager:

Title of training course/topic for event:

Team Trainer/facilitator:

Location:

Duration:

Please take the time to answer the following questions. Some questions may require an answer as a rating from 1 to 5 and others a Yes/No response. Where the question dictates, or where you feel appropriate, please give your honest opinions and comments.

Please mark the following with:

1 = Unsatisfactory, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Excellent

A. Your reaction to the learning event

Overall impression of this event

The skills and concepts presented were relevant to the job/role I will be doing

Balance (theory versus practical sessions)

The Trainer/facilitator

Demonstrated a thorough understanding of the content and presented it coherently

Maintained an appropriate pace for learning

Created a comfortable environment in which to ask questions and express concerns

The Booking

Where appropriate, how did you find the booking procedure?

Evidence of learning

In what ways did the learning event meet your objectives?

What aspects of the event did you find the least useful?

What will you change as a result?

What did you learn which you can apply within your own job immediately?

What has the learning experience highlighted for you still to develop?

What behavioral changes might you make in response?

Would you recommend this course to someone else in your field?

Do you have any additional comments?

B. Benefits to your organisation

What are the resulting benefits to your organization of you having attended this course?

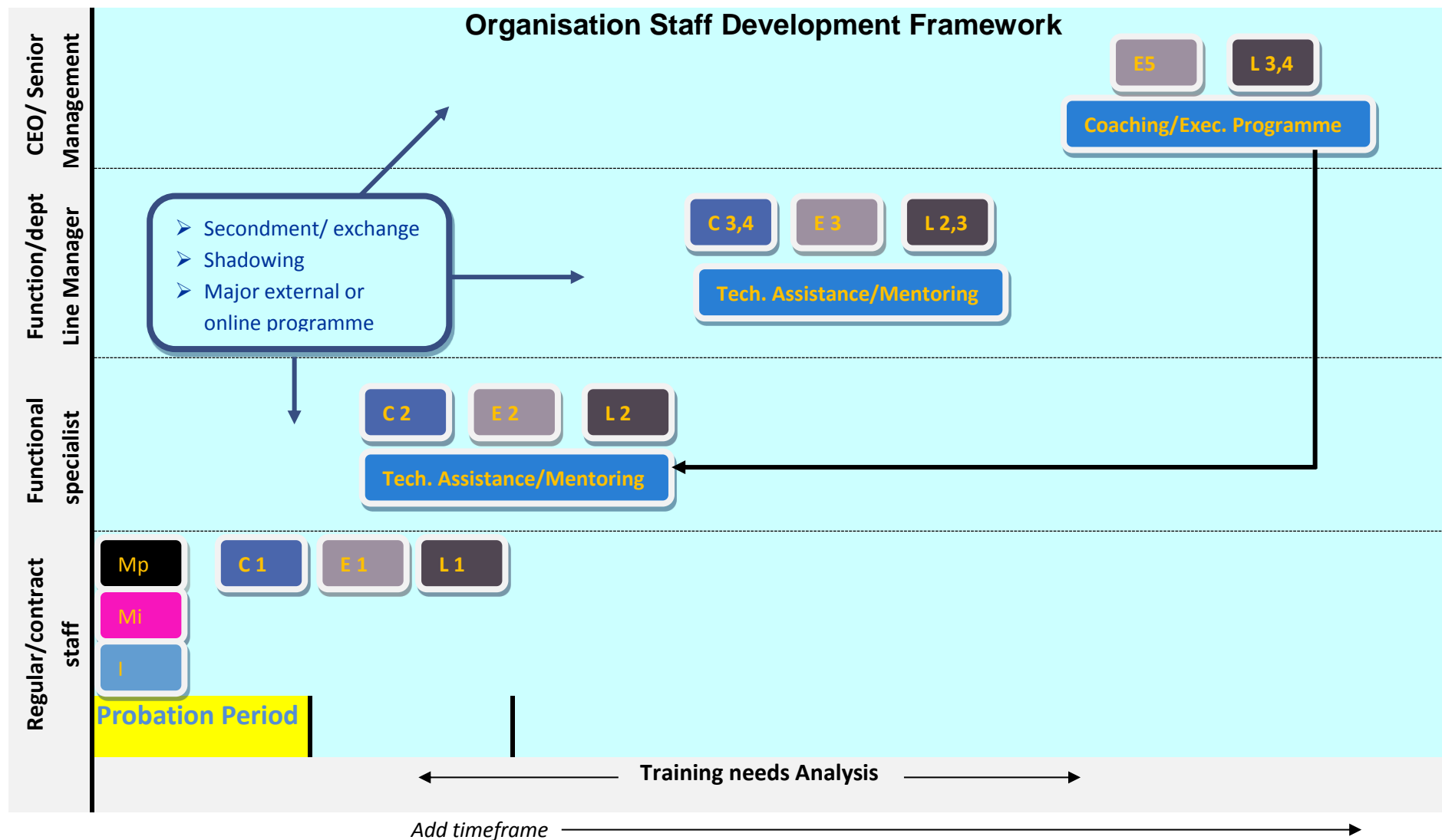
How will it impact your goals for this year?

The staff development programme recommended is designed to appropriately address individual learning styles through a blended learning approach. The development and implementation of this programme could be staged with a pilot initiative for frontline managers, to ensure take up of the programme, evaluate impact effectiveness and ensure strategic alignment with business objectives. There should be a set of performance measures in place that the Senior Management team and other managers are committed to.

Appendix 10 – Example of a staff development framework using a Harvard ManageMentor blended learning approach¹¹

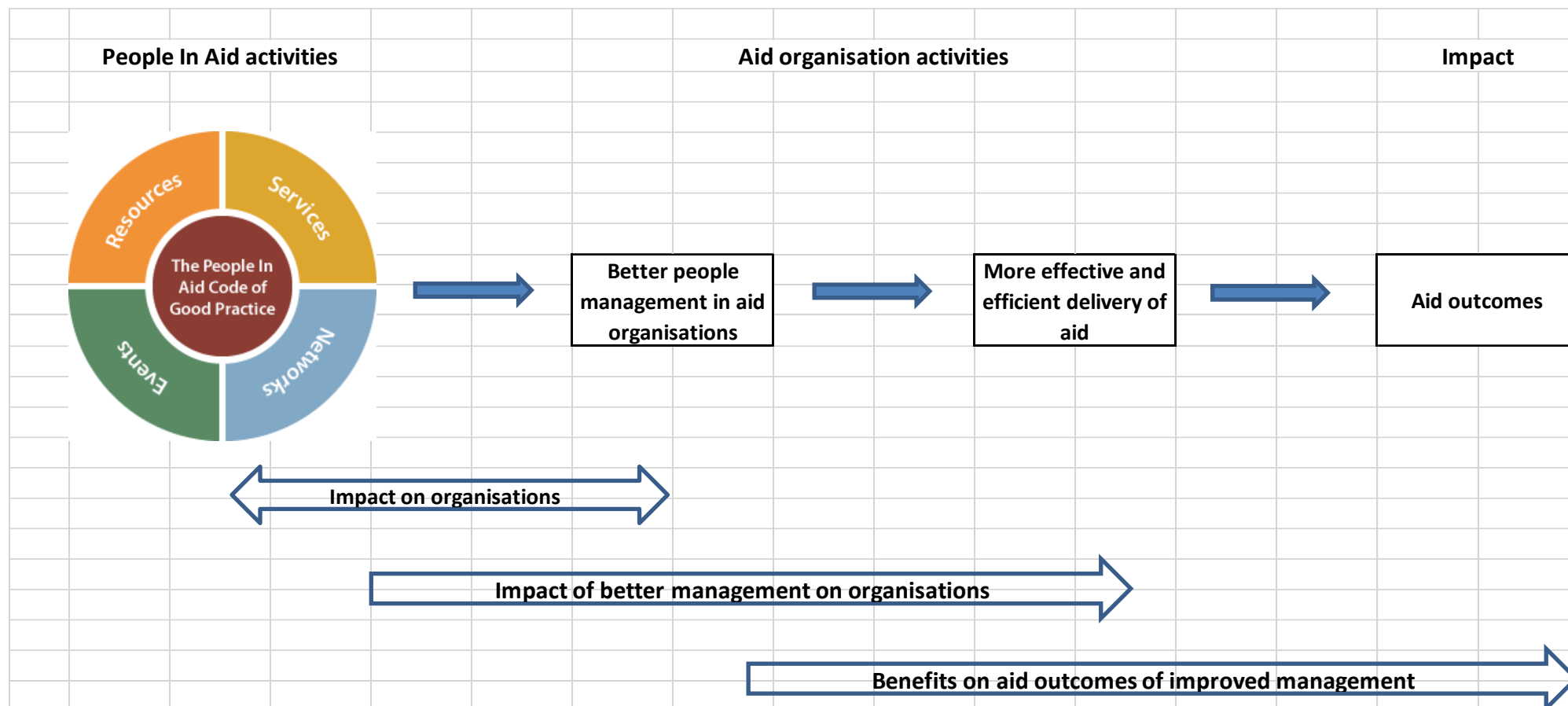
Staff Development Framework			
Key			
I	CORE (C)	ELECTIVE (E)	LEADERSHIP (L)
<p>Basic organisation and site Introduction & orientation</p> <p>Mi</p> <p>Mandatory introductory training for all staff</p> <ul style="list-style-type: none"> Children and Vulnerable adults Protection Organisational Values Data Protection <p>Mp</p> <p>Mandatory organisation Policy Procedures and Practice, in-house legislative compliance and basic sector specific standards compliance</p> <ul style="list-style-type: none"> Induction/staff handbook Collaborative ways of working Time Management Code of Conduct Financial management Personal Stress Management Risk Management Understanding vulnerabilities, gender and cross-cutting issues 	<p>C1 – Beneficiary focus</p> <ul style="list-style-type: none"> Understanding the Vision, Mission and Strategy SOPS (Standard Operational Procedures) Achieving Results (Performance Management Process) My responsibilities for M & E Grants & Partnerships management <p>C2 – Retaining employees</p> <ul style="list-style-type: none"> Recruitment Staff duty of Care Occupational Stress Management Conflict Management Effective delegation Absence Management <p>C3 – Communication</p> <ul style="list-style-type: none"> Writing for work Presentation skills Working with the Diocese Managing across boundaries of time, distance and culture <p>C4 – Annual Planning Cycle</p> <p>C5 – Project Management Tools, including financial planning, use of Excel</p> <p>C6 – Strategic thinking</p> <p>C7 – Accountability to beneficiaries/community</p>	<p>E1 – Crucial Conversations (Face to face and Virtual Meeting Management)</p> <p>E2 – Manager’s Time Management</p> <p>E3 – Understanding the International NGO context</p> <p>E4 – Project Management</p> <p>E5 – Advanced International Standards</p> <p>E6 – Advanced M&E</p> <p>E7 – Advanced Financial Planning</p> <p>E8 – Train the Trainer</p> <p>E9 – Network participation</p> <p>E10 – Managing surge capacity</p> <p>E11 – Humanitarian law</p> <p>E12 – Inter NGO cooperation</p> <p>Mr</p> <p>Mandatory refresher</p> <ul style="list-style-type: none"> Children and vulnerable adults * <p><i>*depending on the required frequency, add into the above framework</i></p>	<p>L1 – Leading your team (including Building Trust and Developing Collaboration)</p> <p>L2 – Resource Mobilisation</p> <p>L3 – Strategic Planning (including Country Operational Planning)</p> <p>L4 – Change Management</p> <p>L4 – Coaching and mentoring</p> <p>L5 – Network leadership</p>

¹¹ Support for the purchase of a Harvard ManageMentor package can be accessed via the website <http://harvardbusiness.org/harvard-managemmentor>.



Appendix 11

CHS Alliance example of the results chain evidence tool



Resources

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Ann Start

Start Development

M: +32 (0)496 55 55 34

SKYPE: ann.start

E: ann@start-development.com