

Learning for Influence

METHODOLOGY



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ACKNOWLEDGEMENTS

The authors would like to thank IEA and FIT-ED for participating in the pilot for this methodology and contributing to its development. We also gratefully acknowledge the feedback provided by IDRC.

RECOMMENDED CITATION

International Education Association. (2022). *Learning for influence methodology*. International Education Association and Foundation for Information Technology Education and Development.



International Education Association and Foundation for Information Technology Education and Development, Inc., 2022.

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This work was carried out with the aid of a grant from the International Development Research Centre (IDRC), Ottawa, Canada. The views expressed herein are those of the authors and do not necessarily represent those of IDRC or its Board of Governors; the members of the [TPD@Scale Coalition for the Global South](#); or the Foundation for Information Technology Education and Development.



PURPOSE

The Learning for Influence methodology¹ is for organizations working in development who want to better understand and document how they influence policy and practice.

*What does impact on policy and practice mean in your work?
What stories can your organization tell about how you achieve change?*
.....

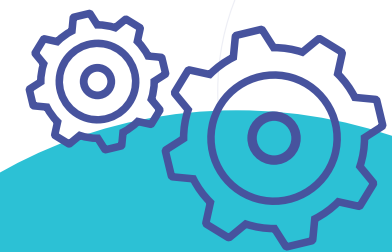
This methodology will help answer these questions. It will help you gain a deeper understanding of the policy change processes that you are engaging in, and it will help you understand how to influence them better in the future.

This includes organizations that are working to create change within systems, such as education, health, agriculture, and governance; and organizations working for sustainable development at all levels. The methodology aims to help these organizations better understand the change processes that they contribute to, as well as how they are changing as individuals.

This methodology will help you document your knowledge of the change processes you are trying to influence by helping you articulate the values that inform how you work and the context that you work in, and creating narratives that show how your organization has impact. This methodology puts emphasis on the importance of the perspectives of people working within organizations to achieve change, and on the stories that they can tell together about their experience. This emphasis puts people at the forefront of how impact happens over time.

¹This methodology was developed through an iterative pilot process with IEA Lebanon and FIT-ED, with the support of IDRC. Each of the components of the methodology, including the specific questions and methods, was tested and refined during the pilot.

This methodology uses narratives and storytelling within a complexity framing to generate and capture experiences that may be missed by other monitoring, evaluation and learning (MEL) approaches. Learning for Influence can complement other MEL approaches, such as outcome mapping, outcome harvesting, Most Significant Change, and impact stories.



The methodology focuses on four dimensions that shape how influencing policy and practice happens: context, organizational approach(es), examples from practice, and stories of impact. The methodology aims to generate multiple perspectives within an organization and can also be used for collaborative learning across a network of organizations working together. Therefore, the methodology should involve a variety of individuals within organizations working to influence policy and practice.

OBJECTIVES

Use these insights to build a story about your influence

- The overarching objective of this methodology is to help build a deeper understanding of the policy change processes that you are engaging in to help you understand how to influence them better in the future .
- Understand the perspectives and experiences of people within your organization regarding how they influence policy and practice.
- Document these experiences through stories based on their own practice.
- Gain better insights into your organization's own story and understand how you have influence. Use these insights to build a story about your influence.
- Show how to strengthen the long-term capacity of your organization to influence policy and practice.



Pilot results point to the benefits of a collaborative learning approach, so we recommend undertaking the methodology with more than one organization, if possible.

The methodology requires a small group of participants from each organization (up to 12 people), with direct experience in trying to influence policy and practice through their work.

BACKGROUND

One way to document the complexity of how policy change happens is through stories about experiences of working for influence. Alongside the existing Monitoring, Evaluation and Learning (MEL) approach and results frameworks that focus on the impact of a project or program, this methodology solicits stories from organizations about their everyday experiences with influencing policy and practice over time and across different projects. These stories can be sensitive and political in nature, given the complexity of how that influence *actually* happens (as opposed to

an idealized version of ‘evidence-based policy influencing’). Based on this, stories are not currently adequately documented through results frameworks or within the boundaries of most impact stories. This is because these systems and methods are not calibrated to elicit such stories and also because when stories are framed as part of an M&E framework, there is a strong tendency to edit out certain aspects of experiences that are important for learning. While gathering qualitative evidence is common within MEL frameworks, this usually solicits anecdotes or experiences via interviews or other methods.

These assumptions need to be part of understanding how organizations influence policy. Therefore, this approach invites individuals within organizations to tell their own stories about their experiences, contextualized by identifying their own assumptions, values and positions first. The Learning for Influence methodology aims to document underlying assumptions **within an organization** about how different people in the organization expect to change policies and practices in development in their particular field or sector. These assumptions may be stated in relation to specific projects, for example in a **Theory of Change** or monitoring framework, but this methodology focuses on organizational assumptions about how to achieve influence. Understanding impact can be difficult and requires multiple methods and approaches. This methodology will increase the level of nuance that an organization can convey about how it achieves impact by focusing on narratives about actual experiences.



.....
The Learning for Influence methodology works with stories by crafting a narrative structure that connects emotions and experiences into a sequence to create a plot, then representing this plot visually and through words. Working with stories in this way can unveil unexpected evidence about how change happens.
.....

This methodology recognizes that organizations are made up of different individuals and that they have reasons for why they work the way they do, including their values and the positions that they choose to take in relation to their work.



Image credit: IEA

Crucially, this methodology is not focused on experiences within only one project. Rather, the scope includes the longer-term trajectory of organizations within their specific context. This scope complements the MEL of more project-focused grant programs through bridging different projects. By taking a more organization-wide view of impact, this methodology can also offer insight into how organizational capacities develop for impact.

METHODOLOGY

OVERALL PROCESS

1. Be sure that you understand the purpose of using the methodology for your organization/network.
2. Choose the most appropriate option for implementing the methodology.



OPTION 1:

Conduct the activities with a small group from within your organization.

OPTION 2:

Conduct the activities with a small group from within your organization and collaboratively with other organizations with their own groups (The pilot showed that the collaborative dimension increased benefits for organizations in terms of learning.).



OPTION 3:

Conduct the activities independently following this guide.

OPTION 4:

Have the activities facilitated online by an experienced facilitator who has previously used the methodology (The pilot showed that live facilitation helped make the process easier to engage with and understand.).



3. Schedule four sessions.

SESSION 1:

Discuss why you are using this framework, review the process, decide who will be involved and schedule sessions 2-4. (approx 1 hour).

SESSION 2:

Conduct the methods for the Organizational (p 14-15), and Contextual (p 18-19) dimensions (approx 3 hours).

SESSION 3:

Conduct the methods for the Practice (p 22-23), and Impact (p 26-28) dimensions (approx 3.5 hours).

SESSION 4:

Conduct analysis and debriefing (p 33) (approx 2 hours).

4. Consolidate and decide how to share findings

It can be important for results to be kept confidential and for some findings to be kept internal. This guarantee allowed participants in the pilot to be more open about what they learned without worrying about compromising their reputation or showing themselves in a negative light. The confidentiality of the discussions made them more useful for learning. Given this result, organizations should set aside some additional time to decide how and what to share from the findings so that the benefits for learning will not be lost.

DO IT ONLINE OR ON PAPER!

Online or paper-based tools can be used to conduct this process.

Set aside time for the group to familiarize themselves with tools.

Here are some options for online tools that can be used:

Miro: miro.com/signup
Canva: canva.com/en_gb
Mural: app.mural.co/signup

For a paper-based approach, here is a suggested list of materials:

- Flip chart or newsprint paper
- Plain printer paper, cut in half
- Markers, colored pencils, pastels or crayons
- Colored paper or cards in assorted colors
- Tape

We suggest using Miro boards for the discussion and content created as it facilitates connectivity and collective thinking. Allow some time for everyone to practice working with Miro before starting the process.

STEP

There are **four dimensions explored** through this methodology. For each dimension, there are one or two overall guiding questions for the inquiry within that dimension and a set of suggested activities to respond to the question(s). The activities in each dimension build on the previous one, so the **activities should be undertaken in the order set out.**

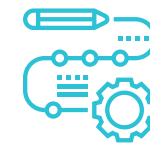


1. Organizational dimension

KEY QUESTION GUIDING THE INQUIRY FOR THIS DIMENSION

Why do you do what you do?

The analytical purpose for the organizational dimension is to understand the overall mission of the organization and the roles involved. The method described will help you to identify and describe a set of roles/metaphors for how your organization approaches influencing policy and practice, i.e., how people and organizations see their mission. The reason this is needed is because an understanding of the organizational mission and roles is often implicit in MEL frameworks and in attempts to measure impact. This methodology makes these characteristics visible so that their importance in informing how influence happens can be better understood. This component of the methodology is therefore aimed at helping organizations articulate the norms that inform how they work to explain why particular choices within their work are made.



METHOD

Mapping of values and aspirations at organizational level using metaphors

TIME
REQUIRED

1 hour



QUESTIONS

1

If you could choose an animal to represent your organization, which animal would it be and why?

2.

What values do you think most strongly characterize your work in (organization)?
List these values and explain what they mean.

3.

What are you most proud of in your work at (organization)?

4

What changes would you like to see in education in (country) as a result of what you are doing?

Facilitation tip

It is important that people understand that **there is no 'right' answer**; this process is a chance to reflect on your work and your organization.

DOCUMENTATION

1

Create an online board for each organization with a structure in it, or make a poster on flip chart or newsprint paper

2.

Organizations to enter their responses for each question (as text, images, or a combination of both)

**START
MAPPING
USING AN
ONLINE TOOL
OR ON PAPER**

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CASE

Organizational dimension

ORGANIZATION

IEA

LOCATION

Lebanon

METHOD

Visual mapping





2. Contextual dimension

KEY QUESTION GUIDING THE INQUIRY FOR THIS DIMENSION

What is unique about the context where you work and what differentiates it from other contexts?

The analytical purpose for this dimension is to better understand the context in which you work, and how this context informs your strategies for influencing. Although context is often considered within MEL approaches, it may not include all of these aspects and may not focus on the complexity of the relationships between them.

To reflect this complexity and the features of the context that inform how policy influencing happens, you will build a systems map. A systems map is a visual mapping process that makes complex relationships more visible and can identify how different forces, factors and information are related in the context of a specific issue or concern. The purpose of using a systems map is not for the organization to demonstrate their knowledge of the context. Instead, it is to show how understanding the context relates to organizational choices and the strategy for influencing.

Suggested contextual aspects that could be included in the fields of international development, education, and technology based on the results of the pilot are:



Education system (i.e., centralized, public/private, size, etc.)



Political context (open or antagonistic)



Social inequalities (which are most important)



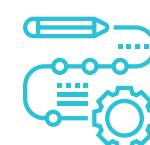
Technological landscape (influence of private tech firms, etc.)



Cultural beliefs



Pedagogical influences



METHOD
Systems mapping

Create a systems map of influencing education policy and practice in (country/context).

1

Brainstorm factors, places, people, organizations, and facts related to influencing policy and practice that your organization has engaged in. Each person can make their own list, or you can make a shared list. This list should include the following:

Factors (factors are actions or conditions that cause consequences or are caused by other influences)

Organizations

Places & People

Positive pathways

Negative pathways

Make a separate list (individual or shared) of other facts and information.

DOCUMENTATION

CREATE THE SYSTEMS MAP USING AN ONLINE TOOL OR ON PAPER.

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TIME REQUIRED

2 hours



2.

Place these on a map using the colors listed in Step 1 (using an online tool or using several large sheets of paper taped together).

3.

Review the map to identify if there is anything missing that needs to be added.

4.

As a group, discuss where pathways connect items on the map. Use red for positive pathways that contribute to positive shifts in policy and practice, and black for negative pathways that hinder policy and practice.



CASE

Contextual dimension

ORGANIZATION

IEA

LOCATION

Lebanon

METHOD

Systems mapping

Context

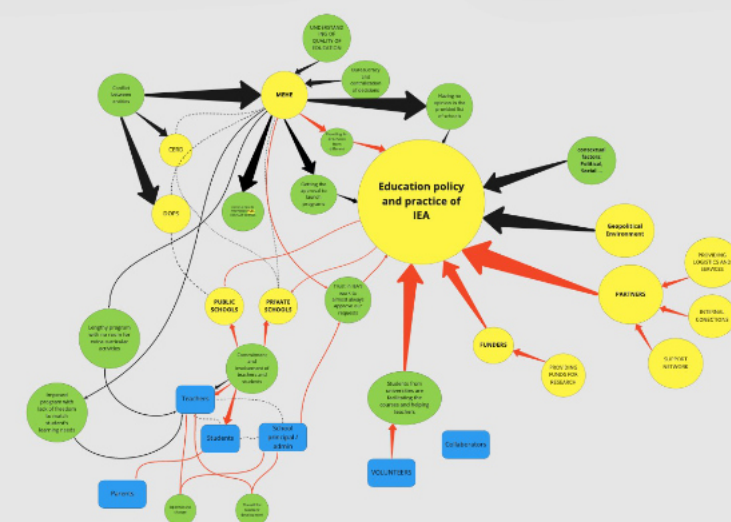
What is particular and differentiates the context where you work?

Create a systems map of influencing education policy and practice in Lebanon.

Steps in the process:

1. Brainstorm factors, places, people, organisations and facts related to influencing education policy and practice. Each person can make their own list or you can make a shared list.
2. Place these on a map using the colours listed below (using Miro or using several large sheets of paper taped together)
3. Review the map to identify if there is anything missing that needs to be added
4. As a group, discuss where pathways connect items on the map. Use red for positive pathways that contribute to positive shifts to policy and practice and black for negative pathways and hinder policy and practice

- *Factors (Factors are actions or conditions that cause consequences or are caused by things) [green]
- *Places & People [blue]
- *Organisations [yellow]
- *Positive [red] and negative [black] pathways
- *Facts and information listed separately





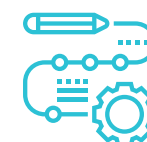
3.

Practice dimension

KEY QUESTION GUIDING THE INQUIRY FOR THIS DIMENSION

Why do you work in the way that you do? How can you show this through examples?

The analytical purpose for the practice dimension is to identify the underlying epistemological positions and assumptions that inform how organizations choose to work. The focus in this dimension will be on the contextual and organizational aspects that are most important because the ways of working are likely to be informed by both. This dimension invites you to describe some of the work that you do that you think is important and to explain why you work in this way.



METHOD

Visual mapping using a river or tree metaphor

TIME
REQUIRED

1.5 hours



Describe three examples of your work that you think are most important in terms of influencing policy and practice in education (who is involved, what are you doing, what are you trying to achieve, what have been the difficulties/challenges/successes of this work). From these three examples, choose one to develop using a visual metaphor: a tree to represent growth, and/or a river to represent a journey (choose between a river or a tree).

1

Create a river or a tree of the example by drawing the characteristics of a river or a tree and associating it with your experiences.

2.

Develop the example visually by drawing a river or a tree and adding elements and details to represent your experience.

3.

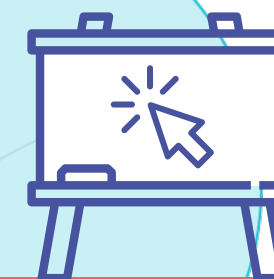
Add words/labels to make the drawing more clear.

4.

Discuss the implications of the exercise.

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CASE

Practice dimension

ORGANIZATION

IEA

LOCATION

Lebanon

METHOD

Visual mapping



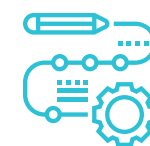


4. Impact dimension

KEY QUESTIONS GUIDING THE INQUIRY FOR THIS DIMENSION

How have you been successful in influencing education policy and practice at scale? What risks have you taken to influence policy and practice?

The analytical purpose for the impact dimension is to surface important experiences of influencing policy and practice, situated in their complexity. The method for this dimension is designed to work with the knowledge people already have and the information they have already collected, rather than acquiring new information. This method aims to elicit examples in their complexity without asking for extremely detailed examples. Examples of impact should be chosen in a reflexive way, with a focus on the idea of learning for change.

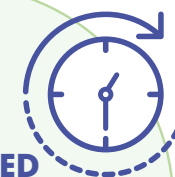


METHOD

Develop an example of influencing policy and practice using storytelling

ESTIMATED
TIME REQUIRED

**90 mins. -
2 hours**



Materials needed: A4 paper, 10 pieces of paper cut in half, pencils/pens, art materials for drawing and/or printing symbols or images



1 Use guiding questions to develop a collective story

Choose a moment or a series of moments that are important to you/ your organization when something changed in relation to policy and practice in education. (15 minutes for discussion as a group to choose the moment(s)).



2. Describe the moment(s):

Who was there? How did you feel?
Where were you?
What happened before this moment?
What happened after this moment?
Why is this moment important?

Write a story using the free writing technique as instructed below, then share and discuss the different versions of the story as a group.

Free writing instructions:
Write for 2 minutes on each prompt. Write without stopping or editing your writing to allow the thoughts to flow as freely as possible.

Facilitation tip

Emphasize that change can be both positive and negative and most examples include both.

**WRITING
SHOULD BE
DONE ON
PAPER OR ON
A BLANK
WORD
DOCUMENT.**

PROMPTS:

I remember when....
I felt....
I/she/he/they did....

10 minutes for this step





3.

Work together to create 6-7 story cards based on the story written in Step 2

Each card should have a step of the story and an image/icon that represents that component of the story. Put the image on one side and the text on the other. The text should cover the characters (who said what? and who did what?), the context (where is this taking place?) and emotions (how did the characters feel?). If this process is being done virtually, make the story cards on Miro or another application of your choice. Images can be sourced from thenounproject.com or other



45 minutes for this step

4.

Share your story

Referring to your story cards, present the collective story to the group. If doing the method collaboratively, request feedback from the other organizations using these questions: **What is the story about? What do you want to know more about? What is confusing? Why is this story important to tell?**



5 minutes to present the story and 10 minutes for feedback and discussion

5.

Finalize the story (to be completed after the session)

Using the feedback and the images as a guide, write a final version of the story.





CASE

Impact dimension

ORGANIZATION

IEA

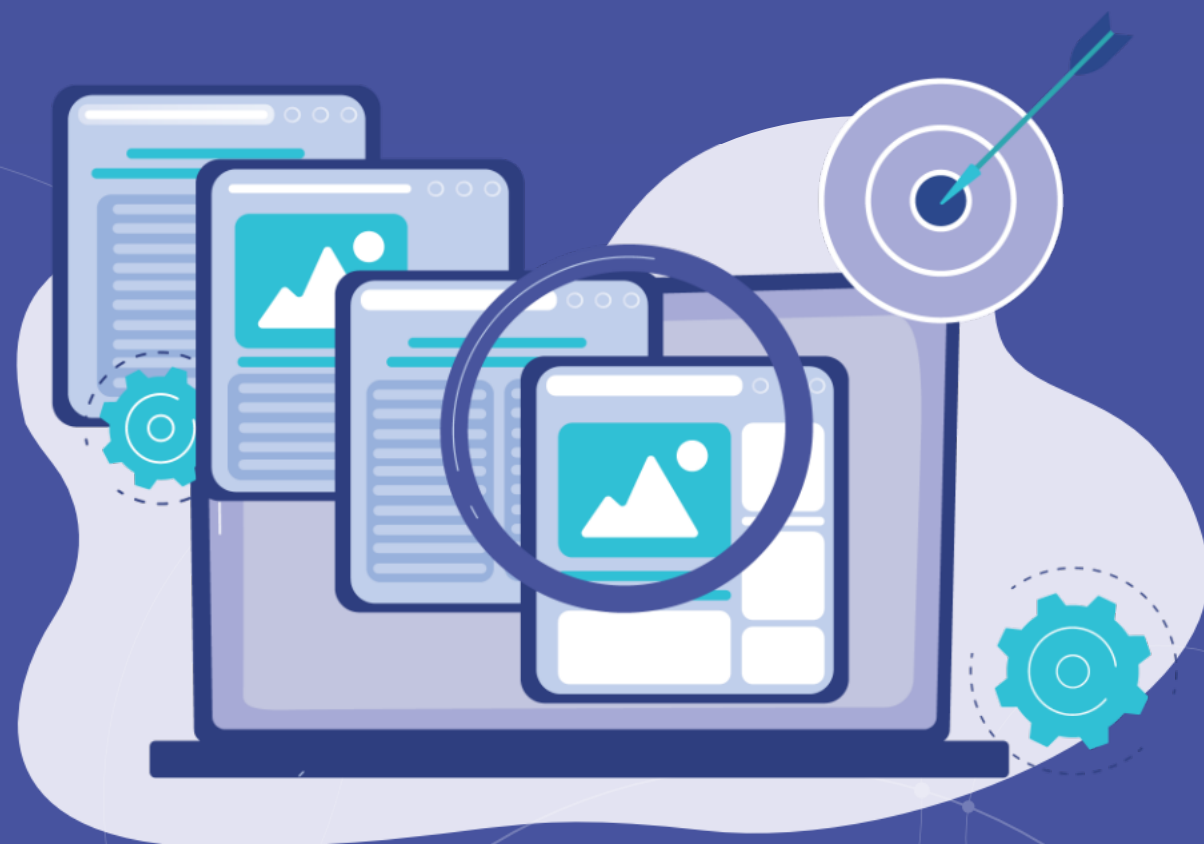
LOCATION

Lebanon

METHOD

Visual mapping





ANALYSIS AND DEBRIEFING

After completing the four methods above, plan a final session to analyze the results and reflect on the process.

TIME
REQUIRED

2 hours



Questions for analysis:

- What did you learn that you did not expect?
- What did you discover about your work/organization that you were not aware of before?
- What do you need to do to make your work more meaningful/effective?
- Have you learned anything that you could apply in future projects/programs aimed at influencing policy?

Questions for reflection:

- What was useful about this process?
- What was missing from this process that you could do next?

CONSOLIDATE AND SHARE FINDINGS

This can include the stories themselves and the results of any of the other dimensions, alongside the responses to the questions for analysis and reflection. Discuss what can be shared more widely and what needs to remain confidential.



Image credit: IEA

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METHODOLOGY

