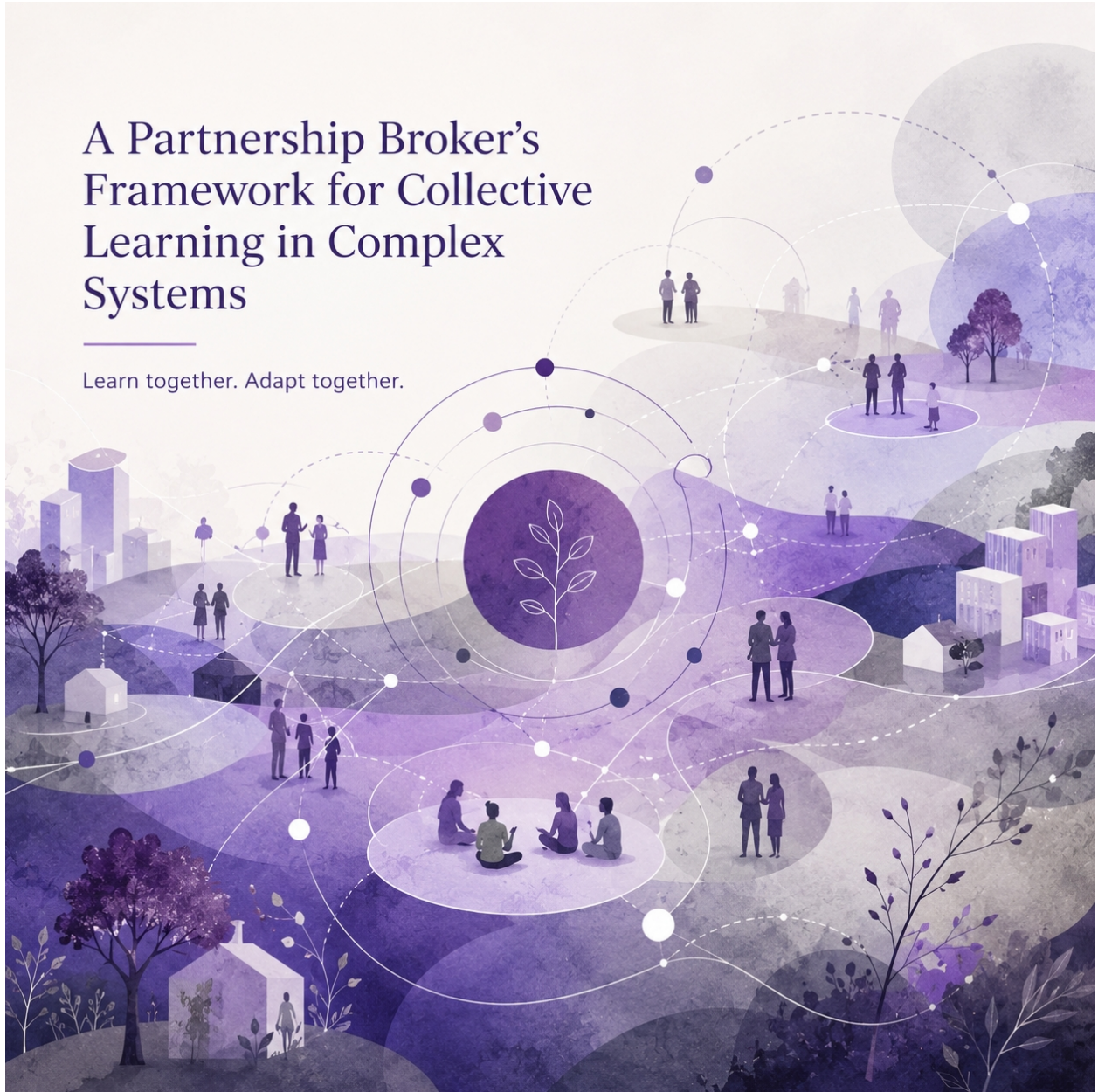


# A Partnership Broker's Framework for Collective Learning in Complex Systems

Learn together. Adapt together.



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## Executive Summary

This guide has been developed as a response to my own experience in partnership brokering which tells me that collective learning is both fundamental to systems change work, and challenging to embed. It draws on the work of many others to propose a lightweight architecture for collective learning that helps brokers and partnerships integrate learning directly into the rhythm of their work.

The framework centres on three key ideas:

- **Learning rhythms**, recognising that reflection happens at different speeds through fast, medium and slow learning loops embedded within the partnership's operating rhythm.
- **Learning gravity**, which may shift between three levels of learning, exploring reflection in the work (operational practice), about the work (system insights and strategy), and about us (the partnership's purpose, relationships and governance).
- **Integration to the work**, ensuring that the right mix of information, experience, insight and authority is present to observe signals, interpret their meaning and enable adaptive action.

Together these elements form a basic architecture that brokers can adapt to their own context. The guide provides practical inputs to support this work, including:

1. An introduction to why collective learning matters
2. A question bank to help shape reflection at different levels
3. Guidance on designing and running learning loops
4. Examples of existing tools and resources that may support different parts of the learning process.

The intention is not to provide a prescriptive system, but to support brokers and partnerships in designing a learning approach that fits their context. As with the systems they seek to influence, the learning architecture itself should evolve over time, applying the same principle at its core: observe, interpret and adapt.

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## The challenge for partnerships working in complex systems

This paper draws predominantly on my experience working with multi-organisation partnerships exploring their role in driving systems change across a variety of domains from public health to education, the environment and human service systems.

Whilst every domain is unique, there are some commonalities to be found in working in complex partnerships and complex systems.

- **Constant flux:** These partnerships typically exist within constantly shifting contexts and environments. As a result, strategies, workstreams, activities, outcomes and metrics all may continue to shift over time, making uncertainty your constant companion.
- **Resource scarcity and tension:** Many contributors to systems change work are already operating within systems which are under pressure. Investments into systems change happen alongside maintaining a sustainable BAU - and sometimes these are pitched into direct conflict. Resource flows can become a challenge both for the work partnerships wish to drive, and for investing into supporting the partnerships themselves - for example through backbone teams and partnership brokers.
- **Multi-level operation :** The nature of complex systems means that we often need to pay attention to, and connect, change at multiple levels - from the macro (narrative, relationships, politics) through the meso (regimes, systems, policies) to the micro (local innovation, practice, tools) ([Geels' multi-level perspective](#)). Different phases of work may require a different focus. This stretches attention and can lead to overwhelm or drift over time.

In this context, what enables partnerships to maintain coherence, relevance and efficacy over time is not the strength of their initial plan, but their ability to learn together and adapt as they go.

### Learning is the work of systems change

When working in complexity, no one change, initiative or policy will be the thing that unlocks a better set of system outcomes. Change requires new product and service innovations, shifts in policy, relationships, resource flows and structures, alongside broader shifts in narrative, mindsets and beliefs.

If we consider learning as a continuous cycle of observing, sensemaking and adapting, it's clearly more than an academic exercise. Completing the learning cycle means acting on what we learn - changing ourselves and the systems around us. With this understanding, we can see that collective learning becomes a powerful engine for change at multiple levels in complex systems. This is what leads the [Human Learning](#)

Systems team to describe “Learning as a management strategy”. It's central to the job of making change happen.

This is very different to considering measurement and evaluation for accountability and compliance only. In this sense, learning moves from being an adjunct that runs in parallel to action, to being an integrated driver and shaper of strategy over time.

### **The brokering challenge**

Brokers sitting in the middle of this complexity are often asked to play multiple roles at once. Often 'learning' contends for priority with a natural drive toward action and the need for sleeves to be rolled up. This tension is likely to be even more the case for internal or hybrid brokers than for externals. The danger is that we miss the opportunity both to shape strategy and to formally document our learning as we go. Whilst this might feel reasonable in the moment when other issues are of high urgency, it can often come back to bite us later when, for example:

- We need to tell the story of the partnership to sponsors, supporters and funders, and to articulate the value and change generated so far
- We are transitioning members in and out of a partnership and risk losing the knowledge and learning that is in their heads, or we need to introduce someone new to the context
- We are revisiting strategy and need to understand what we have already done and how we got to where we are, in order to shape a productive path forward

Brokers therefore need to address learning both from a relational, in the moment perspective (building capability, influencing behaviour) and in a systemic capacity (documenting, data, evidence etc.).

Often a great answer is to work alongside a dedicated learning partner who can support, and guide this work alongside a broker. This is particularly important when we also need independent support for evaluation and evidence gathering. When resources don't allow, however, brokers need a way to bring learning into the core of the work.

There are a lot of great tools, systems and platforms available to support learning and evaluation - I'll share a few that others have created in this paper. This work is intended not as a “new thing”, but as a framework to bring together many existing approaches and methods in a practical way

## **Dimensions of a collective learning architecture.**

Within this paper I explore a few domains which I feel are important when considering an effective learning architecture.

## Learning gravity

As systems operate at many levels simultaneously, systems change and therefore the shared learning that drives it must also do so. We can cut this in many ways, but here I'll propose 3 distinct but connected levels:

1. **In the work - Operational coherence and impact**
2. **About the work - Strategic framing and system intelligence**
3. **About us - Partnership performance, identity and stewardship**

We can also think about this in terms of the **'what' (in the work)**, the **'how' (about the work)**, and the **'who and why' (about us)**. The focus for learning may shift over time, asking us to pay more attention to one level over another - this is what I refer to as the 'learning gravity'.

## Frequency and operating rhythm

Different types of learning may happen at different times and different speeds, so again we need to design for that. As a light introduction, we might want to think about

- **Fast loops:** Focused on the work, supporting work getting done, looking out for barriers, red flags, adapting as we go
- **Medium loops:** Patterns and sensemaking, testing and informing strategy
- **Slow loops:** Picking up on and shaping macro changes over time; values, beliefs, identity; narrative

## The right people in the process

It's important to acknowledge that the collective learning we're talking about is a human process. We might therefore consider, for example:

- Who has the relevant **experience** that we need to draw from? Who's been 'in it'?
- Who has the **expertise** to help inform our sensemaking
- Who has the **authority and mandate** to help us act and adapt?

## Integrating into the project operating rhythm

If it were truly integrated, we wouldn't need to talk about learning at all. At its best, learning happens as a part of partnership DNA, driving the work, day to day.

As a starting point this might mean simply looking at the existing rhythms of the work (e.g. regular cadence of check-ins, strategy and governance meetings) and asking:

- What data or **observations** are we bringing into this conversation?
- How are we creating space for **collective sensemaking** ?
- How will we **act and adapt**, based on what we're noticing?

What follows in this paper are a set of proposed inputs and frameworks designed to help practitioners establish a fit for purpose learning architecture for their work.

This is not intended as a step-by-step instruction guide, or a ready-to-use learning system. Rather it's intended as a reference to support the work and conversations required to get started.

It's designed to be **lightweight** ; **modular** ; **adaptable** and **non-prescriptive** .



What is the role of collective learning in the change you are working with your partners to create? How is it important to you now, in the moment? How might it become valuable later?

## Question bank for three levels of learning

This section contains a starting bank of questions to help brokers think about the conversation they might want to have at different levels of learning. These questions are intended to be both:

- **Illustrative** , to uncover the nature of the conversations that might take place at each level, and
- **Input, for brokers** to use, build on and change as appropriate for context.

This list is intended to be neither prescriptive nor comprehensive. The bank should be open to evolution and iteration, whilst the specific questions that are used should look different in each context they are applied.

In particular, brokers should consider the cultural context for the work they are engaging in - even better, shape the specific questions you want to ask with your partners.

Level	Observing	Sensemaking & adapting
<p><b>Level 1: In the work.</b></p> <p>Outputs; process; coordination; resource allocation.</p> <p>Do no harm. Do better.</p>	<ul style="list-style-type: none"> <li>• What have we achieved or delivered?</li> <li>• How effectively are we getting work done through the partnership?</li> <li>• Where are we noticing work getting slowed down?</li> <li>• What is causing frustration or confusion for people?</li> <li>• What patterns of behaviour are we noticing?</li> <li>• How effectively are we connecting or coordinating between organisations?</li> <li>• How well aligned are our resources (time, people, funding) with our priorities for action?</li> <li>• Where are we seeing duplication of effort, gaps or overcomplication?</li> </ul>	<ul style="list-style-type: none"> <li>• Are there any red flags that tell us we need to pause or respond quickly?</li> <li>• How might we coordinate better together?</li> <li>• What are the crucial resourcing gaps we need to address?</li> <li>• How might we remove some of the barriers to current workflows?</li> <li>• What capabilities might we need to build?</li> <li>• How can we sharpen our communication?</li> <li>• What should we stop, start or continue, based on what we're seeing right now?</li> </ul>
<p><b>Level 2: About the work</b></p> <p>Impact; assumptions; strategy; systems dynamics.</p>	<ul style="list-style-type: none"> <li>• What feedback are we receiving from those we're engaging with in and around the system (lived experience; decision makers; those on the front line) on the impacts of our work?</li> <li>• What changes are we noticing in the system around us (in terms of outcomes, beliefs, narratives, etc.) in response to our work)?</li> </ul>	<ul style="list-style-type: none"> <li>• What are we learning about how the current system works, and how it leads to the outcomes we're seeing?</li> <li>• What are we learning about the changes required in the system to drive better outcomes?</li> <li>• What is our work telling us about our theory of change?</li> </ul>

<p>Work on the right things.</p>	<ul style="list-style-type: none"> <li>• In what ways are we either disrupting or reinforcing the status quo?</li> <li>• What changes are we noticing in our external environment, that might impact us?</li> <li>• Where do we think the system is currently moving and how well does that align with our theory of change?</li> <li>• What dynamics, beliefs or narratives are we seeing that we didn't expect?</li> </ul>	<ul style="list-style-type: none"> <li>• How might we need to engage differently with people in the system?</li> <li>• What new leverage points or opportunities are emerging?</li> <li>• Are we still working on the right priorities or problems?</li> </ul>
<p><b>Level 3: About us</b> Purpose; identity; trust; legitimacy; relationships; governance; power.</p>	<ul style="list-style-type: none"> <li>• What are we noticing about how each of us are showing up in our partnership?</li> <li>• How are our shared purpose and principles showing up in our actions?</li> <li>• How are others responding to, or interpreting the role of our partnership?</li> <li>• What are the roles and ways of working that are helping us to partner effectively (or not)?</li> <li>• What has surprised us about working in partnership (positively or otherwise)?</li> <li>• Whose voice and perspectives are most strongly driving our agenda?</li> <li>• How effectively are we making and enacting decisions?</li> <li>• What value are we each finding through being in partnership?</li> <li>• How are we and our organisations now thinking or acting differently? Where are we not yet?</li> </ul>	<ul style="list-style-type: none"> <li>• What kind of partnership are we becoming and is that the role we want to play?</li> <li>• What are we learning about the unique value we can bring as a partnership?</li> <li>• How might we articulate the value we now see in this partnership?</li> <li>• How might we address any points of tension or misalignment across the partnership?</li> <li>• What barriers to organisational change might we need to address?</li> <li>• How might we evolve our governance arrangements to better enable our impact?</li> <li>• What capabilities or ways of working might we build to help us in the next phases of the work?</li> </ul>



Which level(s) of learning hold greatest pull for you right now? What observations are most prominent and what curiosity does this spark for you? What questions would you like to shape?

## Designing an operating rhythm for learning

Learning can fail when it's seen as separate to the work, or when it's seen as an additional burden on time and energy. This section is about making learning practical and ensuring that it's embedded into the partnership and into the flow of the work itself.

As with previous sections, it is not intended to be prescriptive, rather to be used as a tool to support thinking and decision making in embedding learning rhythms into the work.

The challenge in this work is to keep the learning architecture lightweight and manageable, able to run at multiple cadences (fast, medium, slow) whilst maintaining space for learning and responding at each of the three levels we've described. We can think about this in terms of designing learning rhythm, and running the learning loops.

## Designing the learning rhythm

A significant part of the challenge for embedding learning is in creating and protecting the time and space for it to happen. Creating deliberate space for learning to occur alongside delivery is crucial to prevent it from becoming ad hoc and sporadic.

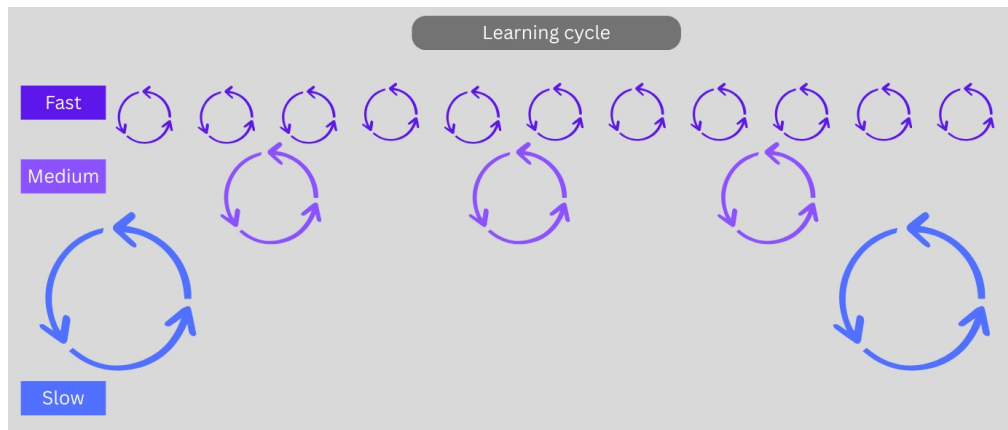
This section explores the nature of loops; cadence; participation; and integration that might help to embed learning at different speeds.

### 1. What are the different learning loops you need within your partnership?

Returning to the idea of fast, medium and slow learning loops, we can think about how these might fit together in nested learning cycles. These connected but parallel loops will in essence run continuously in parallel over different time frames, and create opportunities to reflect upon operational practice, interpret system patterns, and build partnership strength over time.



In a weekly workstream meeting, a partner flags repeated delays in coordination. Rather than moving on, the broker pauses for 5 minutes to ask: "Is this a one-off or a pattern?" That small intervention surfaces a systemic bottleneck—triggering a medium-loop conversation the following month.



**Illustration** : an illustrative 'learning cycle', consisting of fast, medium and slow loops.

We might imagine that one 'learning cycle' starts and ends with a 'slow' loop, and so each cycle overlaps with the previous. This is an arbitrary definition but it does enable us to start to think about how this could translate into different real world contexts.

To explore each frequency of loop in turn,

- **Fast loops** provide opportunities to observe operational signals and adjust the work in real time. They focus on what partners are experiencing in practice: how activities are unfolding, what barriers are emerging, and what immediate adjustments may be required. The aim is rapid awareness and adaptation.
- **Medium loops** provide space to step back from day-to-day activity and consider patterns that are emerging across the work. Here the focus shifts from operational signals to strategic interpretation. These conversations explore what expected and unexpected impacts may be revealing about how the system actually functions. They provide opportunities to test assumptions, refine theories of change, and consider whether the partnership's current strategy still fits what it is learning.
- **Slow loops** create space for deeper reflection on shared purpose, and the longer-term trajectory of systems change. These loops help partners consider questions such as whether the partnership's purpose still feels meaningful, and whether any significant course corrections are required in the future of the partnership. Slow loops often fit well with key inflection points or milestones.

There is a natural relationship we might observe between the three frequencies of learning loop, and the three levels of learning discussed previously. Fast loops lend themselves to a focus in the process of work; medium loops are well suited to strategy, and slow loops may create space for exploration of the partnership itself. However, they are not the same thing - as we'll see when we look at running the learning loops, the gravity of learning across each of three levels may shift at various times, without necessarily altering the overall cadence of our loops.

## 2. How frequently should our learning loops run?

Given different partnerships move at different paces, rather than setting timeframes for these here, we might ask ourselves:

- **Fast** - how quickly does the work generate meaningful feedback, and how quickly might we need to identify and respond to emerging issues?
- **Medium** - how long does it take before meaningful patterns become visible, or we start to see the impacts of the work more broadly?
- **Slow** - When might we be in a position to step back and reconsider our overall direction, resource allocation and investments?

We could imagine that when a partnership is formed in response to an emerging systemic issue or crisis point, the need for a systemic review of investments and direction (slow loop) might drive a cycle length of just a month or two. However, many systems change initiatives know that they are driving a change that will require many years of investment, meaning that a learning cycle of anywhere from 6 months to a year might be appropriate.

Having established this, we can then look at what the support medium and fast cycles might look like. Again, there will be no hard and fast rules here, but perhaps a useful heuristic might be that for each slow loop, we might expect 3-5 medium loops, and for each medium loop, we might expect 3-5 fast loops to have run.

The second heuristic that might be useful to apply is that the more frequent the loop, the lower intensity and duration we might expect it to be. So, for example, we might consider a 10-minute daily stand-up; vs taking a full day or two to review strategy and commitments every year.

! Sometimes learning cannot or should not wait for the next scheduled interaction. If, for example, we notice an issue which creates a health or safety risk, we need our adaptive response to kick-in immediately.

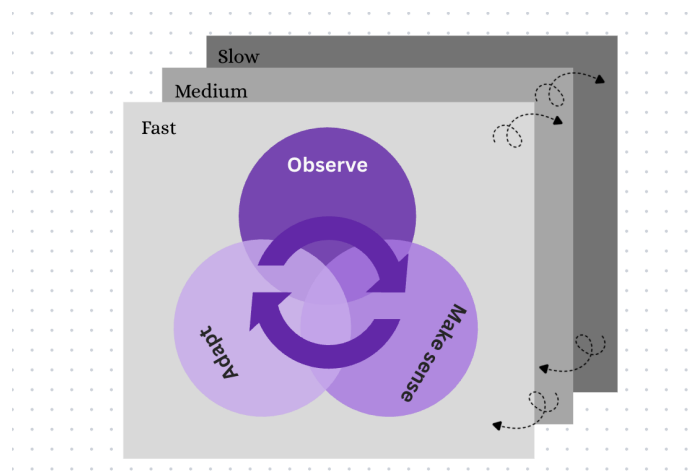
How are you creating space for both scheduled and ad-hoc, or 'in the moment' learning and adaptation?

### 3. Who needs to be involved?

Given that we are considering shared learning as a driver of system change, and considering learning as a very human process, giving attention to participation is crucial.

Each learning loop will typically involve at least three parts - observing; sensemaking; and adapting. This construct can help us to think about who might need to be involved:

- **Observing** - insights from those closest to the work; with **experience** in delivering it, receiving it or being a closely connected stakeholder.
- **Sensemaking** - those who can also bring **expertise** to the conversation, to help reflect on observations and support the group in finding insights, and patterns.
- **Adapting** - those with the **authority** and **influence** to enable course correction or realign resources



**Illustration** : connected learning loops across different cadences.

Depending on the nature of the conversation within each learning loop, this high-level construct might be the same, but the specific participation will vary.

How will you connect learning loops and bridge between different frequencies and levels? How will operational learning inform the strategic thinking of medium loops and how they both feed into the purpose and governance-oriented conversations of slow loops?

### 4. Integrating learning into project operating rhythms.

If learning is not connected to a decision, it will not stick. Integration is about ensuring that learning happens in the places where decisions are made, so that it drives action and adaptation.

Whilst at times it might be appropriate to create new forums for learning, where possible we should think about how we can build it into existing conversations and connect it directly to the rhythm of the work itself. In this way, we have the chance to make learning part of the operating model and the partnership's culture. Over time, participants may come to see conversations about learning as fundamental to the 'doing' of the work.

The integration of learning into existing structures may be as simple as thinking about how we enable **observation**, **sensemaking**, and **adaptation** through our partnership rhythms.

This may look like holding part of a regular agenda aside for a learning conversation, or thinking about how we weave observing, sensemaking and adapting through our core processes. For example:

- Weekly check-ins with supervisors might become a chance to reflect on practice over the week and identify quick adaptations
- Fortnightly workstream meetings may commence with a review of logged observations and insights
- Regular steering or governance meetings may proactively create space for recognising and responding to patterns.
- We might add a 5-minute item to the end of each meeting agenda to support capture and documentation of insights and actions.








Note that you might have multiple integration points for different loops... there may be multiple different parts of the project that create opportunities to integrate learning.

We'll explore integration further in the following section.



**The lightweight principle:** Don't build new processes unless necessary. How can we use and adapt what we already have?

**Tool: Illustrative learning loop planning canvas .**

Loop	Context 	Who needs to be involved? 	Project / operating rhythm integration points 	Notes 
<b>Fast</b> 	e.g. Project delivery	e.g. <ul style="list-style-type: none"> <li>• Project delivery team</li> <li>• Clients</li> <li>• Frontline staff</li> <li>• Project lead</li> </ul>	e.g. <ul style="list-style-type: none"> <li>• Weekly project stand-up meeting</li> <li>• Fortnightly workstream leads meeting</li> </ul>	Do we need to invite any additional people to our meetings?  Think about where our monthly pulse survey fits
<b>Medium</b> 	e.g. Strategy iteration	e.g. <ul style="list-style-type: none"> <li>• Project leads</li> <li>• Delivery team reps</li> <li>• Program lead</li> <li>• External content expert</li> <li>• Learning and/or evaluation partner</li> </ul>	e.g. <ul style="list-style-type: none"> <li>• Quarterly strategy review meeting</li> <li>• Bi-monthly learning partner deep-dive</li> </ul>	
<b>Slow</b> 	e.g. Governance, steering and investment	e.g. <ul style="list-style-type: none"> <li>• Project and program leads</li> <li>• External content expert</li> <li>• Organisational leaders</li> <li>• Sponsors</li> <li>• Funders</li> </ul>	e.g. <ul style="list-style-type: none"> <li>• Annual review meeting</li> <li>• Project phase-end stage gate meeting</li> </ul>	

**Content is illustrative only.** You might find it helpful to use a similar canvas to help you to think about how you might plan your learning cycles.

## Running the learning loops

Getting the time and space in diaries is often the biggest hurdle to overcome. Next, we need to explore how to plan and run our loops to ensure we get value from them.

Whether we are looking at fast, medium, or slow loops, it will be important to ensure that we are appropriately planning and curating the conversations. Of course, it will be important to ensure that the effort is appropriate - if we are running weekly reflection sessions for example, we need to ensure that we are not designing a cumbersome process to operate.

What matters is how we support each step in our learning loop:

- **Observation:**
  - Which level of learning are we orienting toward at the moment?
  - What data are we bringing to our conversations that enable us to think about the insights and observations we are coming across in our work?
  - What observations do we want people to share live?
  - How are we creating the space to share safely and transparently?
- **Sensemaking:**
  - How are we creating space for pattern recognition and reflection within our conversations?
  - How are we moving from traditional report backs to more collective exploration?
  - How are we able to pull ourselves out of the moment and see the bigger picture?
- **Adaptation:**
  - How are we identifying appropriate responses to what we are noticing?
  - What are our pathways to translate learning into action, and what are the governance mechanisms we need?
  - How are we enabling disciplined follow through in response to what we are noticing?

We can explore what this looks like as we progress through a loop.

### 1. Understanding which level (s) we are orienting to

As discussed previously, whilst there is a reasonable alignment between the 3 levels of learning and the three speeds of loop, they are not a 1:1 match. As we think about where to focus our conversations, it will be useful to think about which levels of learning are pulling most strongly at any point in time.



**Illustration:** The PBA Partnering Cycle

If we take the PBA brokering cycle as a useful frame of reference, experience probably tells you that learning will lean toward different levels at different phases. Acknowledging that this is not a linear process, it may be more helpful to think of these less as phases and more as operating in different modes.

1. **Scoping and building** - This mode has a highly relational focus, leaning into trust, purpose alignment, and collective identity. We might therefore broadly expect a gravity that leans toward level 3, backed up by a secondary pull toward level 2.
2. **Managing and maintaining** - As we get to the work of delivery, we may have a stronger focus on how we are getting things done, gravitating toward level 1 learning and also influencing level 2.
3. **Reviewing and revising** - By its nature, this mode of working happens at a more regular and slower tempo and lends itself to testing models and assumptions, broadly speaking a level 2 gravity, with a secondary focus on level 3.
4. **Sustaining outcomes** - This is about the 'where to from here' for partnerships, and their products. We therefore might expect a gravity leaning toward level 3, with a secondary focus on level 1.

Note that at every stage, no levels are left out completely; some are just more in focus. I use the term 'learning gravity' to indicate where we might feel the strongest pull at any

given time. The fact that this remains dynamic over time is important and means that we need to consciously consider which level or loop we're sitting in at any time.

## 2. Capturing and surfacing observations

Getting the right inputs and information into our learning loops is crucial. This helps us centre our sensemaking conversations around evidence and data; not only subjective experiences. We can think about at least 3 sources of input that might be useful to bring into our learning loops - making this easily accessible with low barriers to participation will help make it sustainable over time.

- **Ongoing in-the-moment observations and feedback**: Enabling those engaging in the work to easily capture insights and observations as they go. This helps ensure we don't miss things through recency or salience bias when we are together in conversation and are not reliant only on those that 'show up.'
- **Data feeds and dashboards**: Where we have ongoing data collection as a part of the work, we can look at opportunities to bring meaningful datapoints into our observations. This helps to bring rational and grounded information into the room.
- **Reflections from participants**: Finally, we can create space within our conversations for participants to share insights and observations from over the previous period. This content will be highly salient, and meaningful for those contributing, but must be balanced against other forms of information.

In planning, it's worth thinking about how to get the right mix of information feeds into learning conversations, balancing qualitative and quantitative, rational, and emotional. There are tools available that can support this work, keeping the effort lightweight as far as possible.

## 3. Creating space for a sensemaking conversation

How we think about setting up to run these conversations will be highly dependent on how we are integrating them into the work of the project. Reflections and learning run as a 5-minute agenda item in a regular daily or weekly stand-up will look vastly different to a deep dive as part of a full day strategy session.

Whatever the case, it is worth considering the same kind of dimensions and steps to the conversation:

1. Orient to the aim of the conversation and the level(s) of learning currently in focus
2. Create space to explore inputs, data, and reflections from those in the conversation

3. Give individual reflection opportunity for people to stand back and notice patterns, trends across observations, and across timeframes (e.g., is this something we've been seeing for a while, or is it a new thing)
4. Share reflections and insights and discuss what might be important/what might we need to respond to
5. Discuss and agree what adaptations might be necessary
6. Identify pathways and ownership for those adaptations
7. Document insights, decisions, and actions

The process can run fast or slow, depending on the breadth of issues under consideration, as well as the timeframes we're working to.

#### **4. Establish pathways for follow through**

As an output from our sensemaking sessions, we should have a view of the adaptations we're looking to make. We then need to ensure that we have identified the appropriate pathways to make those adaptations and will need to understand:

- Do we require any further approval or authorization? If so, what is the appropriate governance channel?
- How are we building accountability for delivering the change?
- What are the timeframes we hope to act within?
- What resources or support will those accountable need to enable this work?
- How are we going to test and learn as we implement this change, and what will tell us if it has been an appropriate adaptation?

This is where discipline and accountability become important. Having the right tools, systems, and processes in place to support action and follow through will make all the difference.

This part of the work helps to create the discipline needed to ensure that learning lives and drives change. We therefore also need to think about the important work of documentation:

- Who is responsible for capturing insights and evidence?
- Where are they stored?
- How are they used and revisited?
- How are they shared with others?

The knowledge created through this work becomes a source of sustained value for the partnership and helps continue to drive change through collective learning.



At the end of a regular meeting, the broker asks: “Before we close, what are we taking from this, and what will we do differently?”

The group identifies one key insight and agrees on a small change to test. The broker captures it, assigns ownership, and flags that it will be revisited next time. It takes less than five minutes.

At the next meeting, that moment creates continuity, linking reflection to action.

**Learning doesn't need to be complex. Often, it's the consistency of small disciplines that allows insight to accumulate and drive change.**

## Learning at the personal level

While this guide focuses on collective learning within partnerships, much of this learning ultimately occurs at a personal level.


As partners engage in observing, sensemaking and adapting together, they are also often shifting their own perspectives; how they understand the system, how they relate to one another, and how they choose to act.

These shifts may be subtle, but they are significant. Changes in individual thinking, assumptions and behaviours are often what enable broader changes in how the partnership operates, and how it influences the system around it.

For brokers, this adds another layer to the work. Beyond designing learning processes, there is a role in noticing and supporting these personal shifts. Sometimes by asking more challenging questions, sometimes by surfacing tensions or assumptions that may otherwise remain unexamined.

This work is not always comfortable, and it goes beyond facilitation alone. However, it is often through these moments that deeper learning, driving long-term system change, begins to take hold.

**Tool: Illustrative learning session planning canvas.**

Meeting or workshop: <i>e.g. Quarterly strategy review (F2F)</i>		
<p><b>Learning gravity for this session</b></p>  <p>High</p> <p>Mid</p> <p>Low</p> <p>Level 1: In the work</p> <p>Level 2: About the work</p> <p>Level 3: About us</p>	<p><b>Sensemaking questions in focus:</b></p> <p><i>e.g.</i></p> <ul style="list-style-type: none"> <li>• How are our stakeholders understanding our role?</li> <li>• What impact are we able to generate through our work?</li> <li>• What are we learning about our overall strategy and theory of change?</li> <li>• What is stopping our organisations from enacting change internally?</li> </ul>	<p><b>Governance and action pathways:</b></p> <p><i>e.g.</i></p> <ul style="list-style-type: none"> <li>• Recommended changes to strategy, narrative or investment to next board meeting</li> <li>• Organisational representatives to take change conversations back to their own orgs.</li> <li>• Leads to follow up in pulse insights with teams</li> </ul>
<p><b>Notes on learning gravity:</b></p> <p><i>e.g. Focus is on testing and reviewing theory of change. Low focus on operations, as we have picked that up in weeklies. Some space needed to talk about how we're activating work in partner organisations.</i></p>	<p><b>Session planning to inform agenda</b></p> <p><i>e.g.</i></p> <ul style="list-style-type: none"> <li>• Send out data for review in advance</li> <li>• Create space in agenda to share feedback from stakeholder conversations around the room</li> <li>• Two key conversations:                             <ul style="list-style-type: none"> <li>• Change narrative and stakeholder engagement</li> <li>• Theory of change review (including org change)</li> </ul> </li> <li>• Ensure action and owner review</li> </ul>	<p><b>Documentation:</b></p> <p><i>e.g.</i></p> <ul style="list-style-type: none"> <li>• Decisions and actions into Program action log</li> <li>• Insights, and learning into learning log</li> </ul>
<p><b>Data and inputs:</b></p> <p><i>e.g.</i></p> <ul style="list-style-type: none"> <li>• Project team pulse data</li> <li>• Program dashboard</li> <li>• Stakeholder feedback</li> </ul>		

**Content is illustrative only.** You might find it helpful to use a similar canvas to help you to think about how you might structure your learning opportunities. This will inform, not replace your agenda and facilitation prep.

## Tools and resources to support collective learning

There are many tools, frameworks and platforms available that can support collective learning in partnerships. This guide does not attempt to replicate those tools. Instead, it offers an architecture within which different tools can be used to support observation, sensemaking and adaptation across different learning loops.

The examples below illustrate the kinds of tools that brokers may find helpful at various stages of the learning process. The list is by no means comprehensive and I welcome additions and edits.

Purpose	Tool	What it is	Links and examples
Capturing observations and signals	Insight or learning logs	A place to log insights and learning as they emerge, in the moment.	<a href="#">Emergent Learning</a>
	Most significant change	A participatory, qualitative evaluation tool involving the collection and selection of first-person stories	<a href="#">Clear Horizon</a>
	Pulse surveys	Short surveys used to capture perspectives from participants or stakeholders between learning loops.	<a href="#">Typeform</a> <a href="#">Survey Monkey</a>
	Lived experience feedback	Structured approaches to gathering feedback from communities or stakeholders affected by the partnership's work.	<a href="#">On our own terms: Lived experience advocacy</a>
Tracking impact and system change	Track to Change	A platform designed to support monitoring, evaluation and learning for complex systems change initiatives.	<a href="#">Clear Horizon</a>
	Various evaluation methods	Many existing evaluation approaches exist and can work alongside learning loops.	<a href="#">Better Evaluation: Overview of evaluation methods</a>
Enabling partnership reflection	CHAT	Collaboration Health Assessment Tool, from CSI	<a href="#">CHAT</a>
	Partnerships Analysis tool	A framework that helps organisations assess the strength and effectiveness of partnerships.	<a href="#">Vic Health</a>

Structured learning conversations	Before and After Action Reviews	A simple facilitation method used to reflect on what happened, why it happened, and what can be learned.	<a href="#">Better Evaluation</a> <a href="#">Emergent Learning</a>
	Emergent Learning Tables	A structured approach to capturing hypotheses, observations and insights in complex initiatives.	<a href="#">Emergent Learning</a>
	Retrospectives	Structured reflection sessions commonly used in agile and innovation teams.	<a href="#">Miro template</a> <a href="#">Atlassian guide</a>

To explore further, you may want to check out some of the other resources that have informed, or are referenced in this guide:

- Partnership Brokers Association - [Brokering Better Partnerships Handbook](#)
- [Human Learning Systems](#) (Toby Lowe and colleagues)
- [Triple Loop Learning](#)
- [Viable System Model](#) (Stafford Beer)
- [Multi-Level Perspective on Systems Change](#) (Frank Geels)
- [Building Better Systems](#) (Leadbeater and Winhall)
- [Water of Systems Change](#) (Kania, Kramer and Senge)

These bodies of work provide a good conceptual foundation for understanding learning in complex systems.

## Learning about learning

As a final note, like the partnerships it supports, a learning rhythm should not be treated as fixed. As partnerships evolve, the learning rhythm itself might need to adapt.

Periodically then we may need to ask ourselves:

- Is our current rhythm creating enough space for reflection?
- Are we focusing on the kinds of learning that matter most right now?
- Are the right people involved in the conversation?
- Are insights leading to meaningful adaptation?

In doing so, the partnership applies the same observe-interpret-adapt cycle to its own learning processes.

The aim is not to perfect the architecture once, but to allow it to evolve alongside the work it supports.



**A note on using this resource** : This guide has been created in response to an experienced need. It is offered freely as a contribution to Partnership Brokers and others who may find it valuable. Feel free to use it for your own purposes; where appropriate, references to its origination are appreciated.

A resource like this is never correct or complete ('useful' is a nice benchmark to strive for), and I welcome comments, corrections, feedback and suggestions. With thanks to those that have already engaged with this work and have made it better already.

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