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Review of the World Bank Group's Staff Learning Framework

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Acknowledgments

represent the views of the World Bank Group, including WBI or the Knowledge and Learning Board.

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Suggested citation: Dawn Roberts. 2005. *Review of the World Bank Group's Staff Learning Framework*. World Bank Institute. Report No. EG06-112. Washington, DC.

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Acronyms and abbreviations

ACS	Administrative and Client Support
AFR	Africa Region
AIS	Activity Initiation Summary
ART	Accelerating Results Together
ASTD	American Society for Training and Development
BW	Business Warehouse
CAS	Country Assistance Strategies
CD	Country director
CFO	Chief Financial Officer
CLO	Chief Learning Officer
DEC	Development Economics
EAP	East Asia and Pacific Region
ECA	Europe and Central Asia Region
EDI	Economic Development Institute
EDP	Executive Development Program
ESSD	Environmentally and Socially Sustainable Development
ETC	Extended term consultant
ETT	Extended term temporary
EXT	External Affairs
FSD	Financial Sector Development Department
FY	Fiscal Year
HDN	Human Development Network
HLM	Hierarchical linear modeling
HQ	Headquarters
HR	Human Resources
HRS	Human Resources
HRSLB	Human Resources Learning Board
HRSLO	Human Resources Leadership and Organizational Effectiveness
IBO	Introduction to Bank Operations
IDP	Individual Development Plans
IFC	International Finance Corporation
IMF	International Monetary Fund
INF	Infrastructure Vice Presidency
ISG	Information Solutions Group
KLB	Knowledge and Learning Board
KLC	Knowledge and Learning Council
KLE	Knowledge and Learning Environment Program
KPI	Key Performance Indicators

LCMS	Learning Content Management Systems
LCR	Latin America and Caribbean Region
LLC	Learning and Leadership Center
LMS	Learning Management System
LSG	Learning Support Group
MIGA	Multilateral Investment Guarantee Agency
MNA	Middle East and North Africa Region
MTL	Multisectoral Team Learning Program
NMLP	New Managers' Leadership Program
NW	Network
OCS	Operation Country Services
OETF	Organizational Effectiveness Task Force
OPCS	Operational Policy and Country Services
OPE	Overall Performance Evaluation
P&I	Process and interaction
P&T	Professional and technical
PBD	Planning and Budgeting Department
PREM	Poverty Reduction and Economic Management
PRSP	Poverty Reduction Strategy Papers
PSD	Private Sector Development Department
PSI	Population Services International
RMC	Resource Mobilization Cofinancing
ROI	Return on investment
SAR	South Asia
SFRRM	Senior Management and the Corporate Resource Management Group
SLC	Strategic Learning Center
SLF	Staff Learning Framework
STC	Short-term consultant
STT	Short-term temporary
TEAMS	Multisectoral Team Learning
TLAP	Trust Fund Learning and Accreditation Program
TOR	Terms of reference
UN	United Nations
UNDB	United Nations Development Business
UNDP	United Nations Development Program
VP	Vice president
VPU	Vice presidential unit
WBI	World Bank Institute
WBIEG	World Bank Institute Evaluation Group
WBIES	World Bank Institute Evaluation and Scholarship Unit
WBISD	World Bank Institute Skills Development

EXECUTIVE SUMMARY

The World Bank Group adopted a new Staff Learning Framework (SLF) in late FY01 to align learning with core business needs. At the request of the Bank's Chief Learning Officer (CLO), the World Bank Institute Evaluation Group (WBIEG) managed this independent review of the SLF to assess whether the new system has led to improvements in the relevance, efficiency, and effectiveness of staff learning in the Bank.

THE STAFF LEARNING FRAMEWORK: OBJECTIVES, ORGANIZATION, AND PROCESSES

The SLF promotes learning that is demand driven, aligned with business results, supported through new forms of pedagogy, and systematically monitored and evaluated. The SLF's objectives do not specify measurable targets but instead set priorities for developing staff capacity and seek to promote a culture where learning is integral to the Bank's business. The first four years of the SLF have focused on major organizational and systemic changes.

- *Organization.* The CLO oversees the SLF and chairs the Knowledge and Learning Board (KLB), which has representatives from the Bank's regions, networks, and other key learning providers. Strategic Learning Centers (SLCs) focus on priority content areas. Regions have a formal role in funding regionwide and country-specific learning events. A Learning Support Group provides support on instructional design and quality, and IEG monitors quality, identifies results, and provides formative feedback to improve design and delivery.

- *Resource Management.* Learning funds are no longer embedded in the budgets of learning suppliers but are instead consolidated under the KLB. The CLO, in consultation with the KLB, recommends the Bank's budget allocation for staff learning to SFRRM. Internal fees for Bank-sponsored learning events have been eliminated to reduce transaction costs and to encourage staff learning.

- *Administrative Systems and Processes.* The SLF is configured to improve the overall accountability for staff learning in the Bank. It has developed centralized functions to track learning activities and participation, to identify outcomes, and to use formative information to guide improvements. Key efforts to improve data quality and to link staff with appropriate learning opportunities have included revamping the Learning Catalog, creating a database for staff learning in Business Warehouse (BW), and designing a new learning management system (LMS).

The new organization and interrelated set of processes that have evolved now serve key functions in the new framework, monitoring quality and assessing impact to inform and improve the design and delivery of learning activities.

RESULTS OF THE STAFF LEARNING FRAMEWORK

The experience in achieving the SLF's objectives has been mixed. Progress can be identified for providing high quality content in priority areas, clarifying accountability, devolving decisionmaking for a demand driven structure, and creating a culture that values learning. Little progress can be measured for changes in pedagogy and meeting the specific needs of learners. Difficulties exist in assessing progress because of the lack of pre-SLF data and measures and the lack of specific indicators against which to gauge success. Notable findings of this review include:

- *Learning Objectives.* The SLF espouses a shift away from focusing only on technical skills towards building capacity to create results. Learning plans link activities to work programs. WBIEG evaluations show that some participants use what they learned in their jobs, and three programs have resulted in operational impact in terms of better compliance to regulations, improved products, and higher quality assurance ratings. Not all types of activities have been evaluated.

- *Content Focus.* New staff learning initiatives are in place to develop behavioral, integrative, operational, and managerial skills. Evaluation results are used to inform improvements.

- *Learner Focus.* Administrative data are insufficient to assess whether the focus of learning programs has shifted away from headquarters staff. There have not been significant increases in the participation of country office staff and in the percentage of joint client/staff activities.

- *Pedagogy.* No recorded, significant increases have occurred in the use of new forms of pedagogy as a percentage of all learning activities; however, new initiatives such as the Trust Fund Learning and Accreditation Program (TLAP) and the use of e-learning have modeled effective practices.

- *Structure.* A new organization is now in place. This new structure was designed to increase accountability, with SLCs responsible for priority areas and IEG responsible for monitoring and evaluation.

- *Culture.* Interviews and staff surveys indicate that learning is becoming more valued within the Bank's culture now than it was during previous arrangements for staff learning.

This review identified few results of the SLF, perhaps because many of the early efforts under the framework have focused on developing and refining administrative systems and designing or piloting new initiatives. Results from the SLF are now beginning to accrue, and further evaluations can provide evidence on progress towards specific objectives.

BENCHMARKING

The Bank is ahead of benchmarks for staff learning in terms of organization, leadership, and evaluation, as determined through a literature review and interviews with six large decentralized organizations. The Bank is comparable to benchmark organizations for the alignment of staff learning with business needs, learning targets, the process for budget allocations to staff learning, average expenditures, and implementation of a LMS. The Bank is below the benchmark for the use of technology in learning.

CONCLUSIONS AND RECOMMENDATIONS

The SLF provides for central decisionmaking and monitoring at the Bank while being responsive to the decentralized nature of the Bank's business. Centralized functions such as administrative data systems and evaluation services support a cycle of improvement to inform learning design and delivery. This review highlights key accomplishments of the SLF but also identifies weaknesses and offers recommendations to strengthen staff learning.

- *Governance.*
    - The KLB is accountable for the success of the new framework, but what constitutes successful staff learning has not been clearly defined. The SLF's objectives reflect priorities rather than measurable targets. Concrete objectives with associated indicators to measure success should drive policies and plans for staff learning.
    - Confusion exists about how the Board sets learning policy. The rationale for decisionmaking authority should link to concrete objectives for staff learning, with a clear rationale for why Board members receive only one vote regardless of the number of staff they represent and why some vice presidential units (VPUs) have only observer status.
    - Board members express confusion about their roles and concern about the Board's ability to function effectively given its size and composition. In some cases, competing interests lead to conflict during Board meetings. Board dynamics are likely to be improved by creating opportunities to honor members' areas of expertise, assigning members more control of the Board's agendas, and using subcommittees to address crosscutting institutional issues.
- *Resource Management.*
    - Board members also express confusion about how resources for staff learning are distributed among VPUs. A clear formula and process should be established to allocate funds for staff learning.
    - A formal process has been established for VPUs to develop learning plans linked to their work plans, but these learning plans are not always based on an effective assessment of staff needs. A repository

of tools and methods to determine staff needs should be available to VPUs, so that they can better identify the knowledge, skills, and behaviors that staff need to achieve business results. In addition, VPUs need information on outcomes and impacts to improve learning design and delivery, but some VPUs have not had any programs evaluated. More information about learning needs of staff and operational impact is needed to improve the alignment of learning activities with business results.

- *Learning Design and Delivery.*

  o The quality of learning activities improved from FY03 to FY04 and has been maintained through FY05. However, despite the fact that the SLF has promoted the design and delivery of learning activities most appropriate for working adults, administrative data do not provide evidence of significant changes since FY03 in the proportion of activities delivered through new forms of pedagogy. Reliable administrative data are critical both for guiding staff participation and for tracking results. The KLB should monitor the LMS and ensure that it leads to improved data quality.

  o As the SLF matures, an increasing number of initiatives are launched or attempted, and systematic evaluation is yielding more information on results. A clearinghouse could offer useful direction to learning providers and other stakeholders on lessons learned. LSG and WBIEG could collaborate to develop this clearinghouse so that lessons gained from evaluation can be applied by learning providers.

  o Stakeholders identified LSG as a useful resource for information on learning tools and technologies and hands-on support for designing curricula. The KLB should clarify the process for enlisting assistance from LSG, so learning providers understand when to draw on this resource.

- *Monitoring and Evaluation.*

  o Evaluations inform staff learning design and delivery but more are needed to provide evidence of what features contribute to impact for which learning objectives. A larger share of the learning budget should be dedicated to evaluation activities.

  o Programs designated for evaluation by WBIEG are typically high priority initiatives, but there is not a clear process for how programs are selected in any given year. A strategy should be developed to ensure that all types of activities in use for staff learning are evaluated over time.

  o VPUs have an interest in analyzing extant data as part of their own efforts to monitor trends and evaluate program results. Given the many difficulties with extracting BW data and the need for informed staff to monitor the accuracy of data files, the KLB should establish a

procedure for requesting data assistance on a trial basis to assess how much technical assistance is needed.

The SLF is likely to optimize the learning available for Bank staff over time. The findings of this review confirm that this new organization has started to clarify responsibilities for staff learning and increased accountability—particularly through monitoring quality and, in some cases, evaluating program impact. However, after the SLF's first four years, it has not yet resolved some key challenges for staff learning. Operational training still needs to be strengthened. A cohesive strategy for developing effective managers should be developed. Many learning activities continue to rely on tools and methods that are not aligned with adult learning needs. Incremental changes are still warranted to strengthen the learning infrastructure, including further clarification on the appropriate roles for regions and networks and a more systematic approach to identifying opportunities for collaboration among stakeholders responsible for learning. Going forward, the KLB must define the indicators of success, through which to set corporate learning priorities and to gauge progress towards the SLF's objectives.

1. INTRODUCTION

1.1   Staff learning is of central importance to the Bank's operations. Developing the cutting-edge knowledge, skills, and behaviors to fight poverty and build client capacity is critical to the Bank's success. In FY04, the Bank spent $81.7 million on staff learning. Approximately half of this amount was expended on training received (supporting staff participation in learning – from both internal and external sources), while the balance was spent on training delivered (development and delivery of 3,300 staff learning activities). In FY05, $81.9 million was spent altogether on staff learning (training delivered accounted for 2,861 learning activities) (World Bank 2004a, 2005).

1.2   The Staff Learning Framework (SLF) was established in FY01 and includes a Learning Board. The Chief Learning Officer (CLO), who reports to the vice presidents of Human Resources (HRS) and the World Bank Institute (WBI), chairs the Board. This independent review focuses on whether the SLF has led to improvements in the relevance, efficiency, and effectiveness of staff learning. The study addresses two objectives:

- To inform on the progress in implementing the SLF's mandate (relevance and efficiency) and the outcomes/impact (effectiveness) of the SLF's overall strategy in advancing staff learning, as compared to the previous arrangements for staff learning; and,

- To provide recommendations on what the Bank and the SLF leaders must do to ensure that staff learning results in effective and efficient use of resources.

1.3   Data sources included documents and archival data related to staff learning and interviews with 74 Bank staff. In addition, a benchmarking consultant compared the Bank's professional development systems and practices with those of six other large organizations and reviewed data from industry standards. A description of the study methodology with the evaluation questions is in Appendix A.

2.   THE NEW STAFF LEARNING FRAMEWORK: OBJECTIVES, ORGANIZATION, AND PROCESSES

2.1   The Bank adopted the SLF at the end of FY01 to provide staff with the knowledge, skills, and behaviors needed to perform their roles effectively. The organizational changes designed to align professional development with core business needs included devolving decisionmaking from the vice presidential level to the managers responsible for learning, giving regions and other major operational users of learning a greater role in the management of the learning program, creating a community of practitioners with corporate accountability, and defining clear lines of authority. In contrast to previous arrangements for staff learning, the new model emphasizes quality rather than quantity and prioritizes the development of systems to support progress towards new objectives. Not surprisingly, the major organizational and systems changes envisioned for the SLF have required years to implement. Any assessment of the results for staff learning (chapter 3) should occur with this understanding.

A BRIEF HISTORY OF BANK STAFF LEARNING: 1996-2005

2.2   Over the past decade, the World Bank Group has launched several initiatives designed to link staff learning with business results.[1] In 1996, an education and training effort to raise staff professional standards and diversify skills was a key element in the new commitment to become a "Knowledge Bank" (World Bank 1996). The Strategic Compact followed in 1997 with a number of renewal strategies, including a comprehensive reform of the Bank's human resource policies. This reform specified that learning should be driven by business needs to enhance development effectiveness. Under the Compact, the major provider for learning and training activities for staff was the Learning and Leadership Center (LLC) and the one for clients was the Economic Development Institute (EDI). The structure for learning and knowledge management was streamlined in 1998 and 1999, with the merger of governance functions into the new Knowledge and Learning Council (KLC) and the merger of EDI and LLC into the new World Bank Institute (WBI).

2.3   In FY01, a review of staff learning identified ongoing challenges for the KLC. Some 60 learning stakeholders used the participatory "Accelerating Results Together" (ART) process to develop recommendations for strengthening the impact and effectiveness of staff learning. The SLF is an outgrowth of this effort. A summary of this history is shown in figure 1, and a detailed history of staff learning during this period is presented in Appendix B.

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[1] Some initiatives focused not only on staff learning but also on client learning or knowledge sharing. The focus in this report is limited to staff learning since that is the function analogous to the SLF.

Figure 1: Key Bank initiatives in staff learning from 1996-2005

Knowledge and Learning Board

Learning Board was reconstituted into a Knowledge and Learning Board responsible for providing leadership on knowledge management and sharing and staff learning.

2005

Knowledge Bank

World Bank Group initiated a new education and training effort to raise the professional standards and diversify the skills of its staff.

1996

Strategic Compact

Renewal strategies under the Compact included a comprehensive reform of the Bank's human resource policies. This reform emphasized that learning should be driven by business needs, that learning contributes to excellence, and that learning alongside clients can enhance development effectiveness.

Staff Learning Framework

The Learning Board, headed by a chief learning officer, included representatives from regions, networks, and other key learning providers.

2001

Key Bank Initiatives for Staff Learning

1997

Accelerating Results Together

The ART Process was used by stakeholders to identify steps for strengthening staff learning. The results contributed to the establishment of the Learning Board and chief learning officer (CLO) position.

Learning and Leadership Council (LLC)

LLC provided most learning and training activities for staff.

World Bank Institute

LLC and EDI merged to become WBI.

1999

Economic Development Institute (EDI)

EDI, established in 1955, continued to provide most learning and training activities for clients.

1998

Knowledge and Learning Council

The KLC was established to ensure that learning programs met the Bank's business needs and translated into concrete results for clients. Responsibilities included actively monitoring, coordinating, and strengthening the strategic approach to learning across the Bank.

OVERVIEW

2.4   The new organization of the SLF called for a senior, full-time chief learning officer (CLO) to oversee staff learning.[2] The first CLO, who reports to the HR vice president and the WBI vice president, was appointed in June 2001, and a Learning Board was established with representatives from the regions, networks, other key learning providers, and the International Finance Corporation (IFC).[3] The manager of the WBI Evaluation Group (WBIEG) was appointed to the Learning Board, ex officio—signifying the formal role of systematic evaluation within the new framework. To support quality learning better, the Learning Support Group (LSG) was created in the CLO's office. Figure 2 illustrates the SLF's organizational structure at the time of its establishment, and table 1 shows the current membership.

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[2] This position replaced the KLC secretariat, who was part-time and not at the manager level.

[3] The Multilateral Investment Guarantee Agency (MIGA) joined the Learning Board as an observer in FY04.

Figure 2: Overview of staff learning system as established in FY02
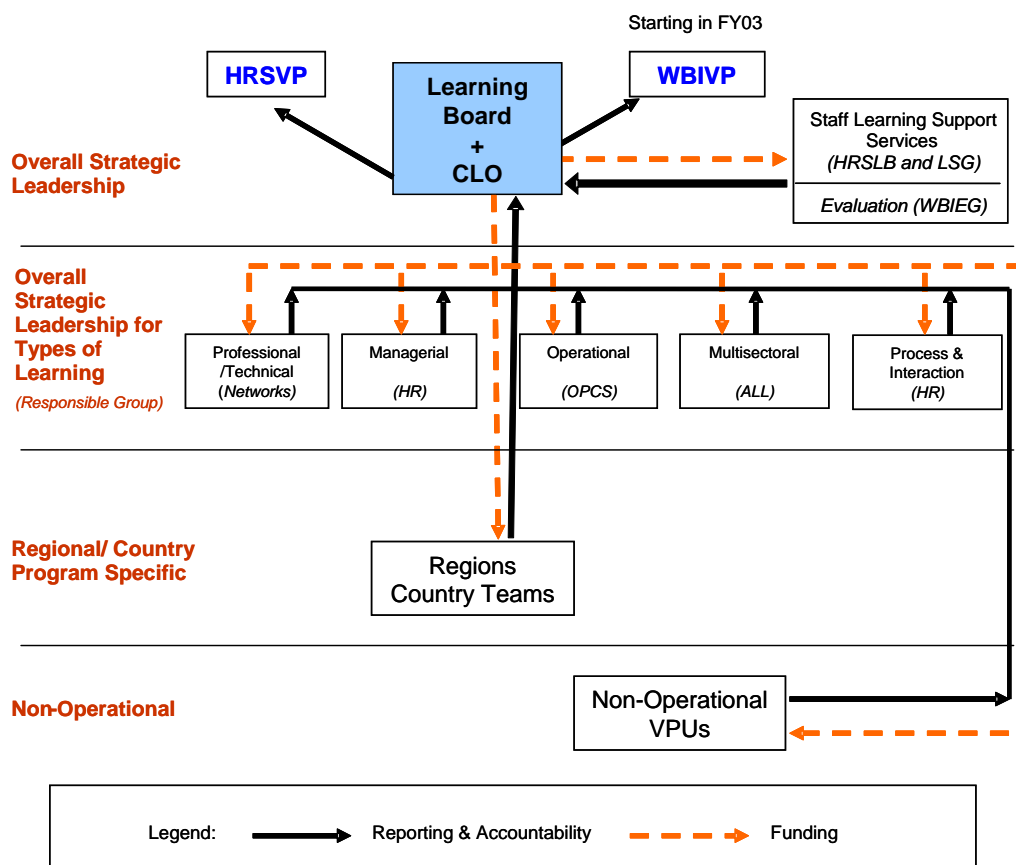
Table 1: Membership of the Learning Board, FY05

Region	Strategic Learning Centers		Other Members	Observers
Africa (AFR)	Administrative and Client Services Network (ACS)	Poverty Reduction and Economic Management Network (PREM)	Development Economics (DEC)	External Affairs (EXT)
East Asia and Pacific (EAP)	Environmentally and Socially Sustainable Development Network (ESSD)	Operations Policy and Country Services (OPCS)	International Finance Corporation (IFC)	General Services Department (GSD)
Europe and Central Asia (ECA)	Financial Sector Network (FSE)	Private Sector Development (PSD)	Legal Department (LEG)	Operations Evaluation Department (OED)
Latin America and Caribbean (LCR)	Human Development Network (HDN)	Management (HRS)	World Bank Institute (WBI)	Multilateral Investment Guarantee Agency (MIGA)
Middle East and North Africa (MENA)	Infrastructure Network (INF)	Client Engagement and Team Learning (CET)		Strategy, Finance and Risk Management (SFRM)
South Asia (SAR)	Information Solutions Network (ISN)			Corporate Secretariat (SEC)

The new framework: learning and business results

2.5   The SLF's overall objective is to link learning with business objectives through a more effective process than the high-level learning calendar model used under the KLC.[4]

2.6   The SLF was designed to strengthen the organization and accountability for staff learning and to encourage changes in content and methodology. As shown in table 2, the new model recognizes that the changing context of the Bank's work requires its staff to have a broad set of knowledge, skills, and behaviors that go beyond narrowly defined technical expertise. The SLF also emphasizes diverse learning tools and methodologies.

Table 2. The new Staff Learning Framework overall objective: linking learning to business results*

	From	Towards
Learning Objectives	Build Technical Excellence	Build Capacity to Create Results
Content Focus	Professional Sectoral Skills	Sustained Professional Expertise with More Behavior, Integrative, Operational and Managerial Skills
Learner Focus	Individual Headquarters (HQ) Staff	More Teams, Country Office Staff and Joint Client/Staff Teams
Pedagogy	Classroom Learning	New Forms of Pedagogy (e.g., peer learning, action learning, e-learning)
Structure	Little Accountability, Learning Silos	Ownership/Accountability Demand driven, Cross-Boundary
Culture	Side Line, I Don't Have Time!	Business Line, Learning Matters!

*The CLO and Learning Board use this table to represent the SLF in annual reports and other publications. The content has evolved some over time; the current version is presented here.

2.7   The early and ongoing priorities established for the SLF, with the recommended programs and action steps to align learning with business needs, are shown in table 3.

Table 3. Early SLF priorities

Early Priorities	Identified Needs to Address Priorities
Developing new learning opportunities for operational teams	• a pilot action learning program for multisectoral teams with specific work deliverables • an operational core curriculum • increasing the number of learning opportunities to develop core knowledge and skills for reducing poverty • a revised Administrative and Client Support (ACS) learning program
Designing a managerial learning program	• mandatory learning plans for all managers • a three-module leadership course for new managers clarifying the institution's expectations and enhancing behavioral and strategic leadership skills • management curriculum focusing on the five core skills areas (the "Five M's": managing self, managing others, managing work, managing the organization, and managing change) • on-the-job learning opportunities, including coaching and a peer learning program
Improving learning tools and methodologies	• increased use of on-the-job learning such as coaching, mentoring, and team action learning • e-learning for professional and technical skills • improvements in the quality of learning offerings

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[4] The KLC's learning calendar is shown in figure 9 in Appendix B.

2.8   At the center of the vision for the SLF is a strategic, transparent, and demand driven framework for resource management. To link learning to business objectives, the CLO and Learning Board introduced a process for developing annual vice presidential unit (VPU) learning plans to set priorities for each year. Funds were allocated strategically based on both corporate learning priorities as identified by new SLCs and demand as presented in the VPU learning plans.

Timeline

2.9   Building the new framework required organizational changes. By the start of FY03, most key pieces of the new architecture were in place, with the changes explicitly designed to do the following:

- Create a demand driven system with simplified funding arrangements;

- Foster a shift from monitoring dollars to tracking products and quality;

- Introduce clear accountabilities for different kinds of learning, cutting down on gaps and duplications;

- Provide more focus on operational, behavioral and interaction skills, and on learning at the operational and country team levels; and

- Strengthen learning support systems (World Bank 2002).

2.10   Key pieces of the SLF were instituted from FY02 through FY05. A timeline of the major milestones for change is presented in table 4.

Table 4. Milestones in the implementation of the Staff Learning Framework

FY 2002	- The Learning Board, chaired by the CLO, began regular meetings. - The Learning Support Group (LSG) was created in the CLO's office to support better quality learning. - An E-learning Working Group was established to coordinate with the Information Services Group (ISG) and other units to oversee pilots designed to show the potential of e-learning. - The process for developing VPU learning plans was instituted. - The Learning Board instituted a competitive funding process to support innovative learning proposals. - The Learning Board launched a Bankwide communications program to increase the awareness of managers and staff about responsibilities and opportunities related to staff learning. - The WBIEG was assigned responsibility for the systematic evaluation of learning activities.
FY 2003	- The CLO began reporting to both the VP of Human Resources and the VP of WBI to increase synergy between the client learning and staff learning efforts. - Regions were given a formal role, with funds provided to design and deliver regionwide and country-specific activities as well as to pay for staff time to attend learning events. - Ten Strategic Learning Centers were designated to develop, deliver, and ensure quality in Bankwide learning. - WBI became responsible for LSG, learning facility management, and learning catalog services. - Internal fees for all Bank-sponsored learning events were eliminated, both to reduce bureaucracy and transaction costs and to encourage staff learning.

(Table 4 continues on the next page.)

(Table 4 continued.)		
FY 2004	▪	The Learning Board, WBI, and ISG started the Integrated Knowledge and Learning Environment Program (KLE) to improve access to and use of the Bank's knowledge resources.
	▪	The process continued (as part of KLE) to replace existing systems with state-of-the-art learning management and learning content management systems (LMS/LCMS).
FY 2005	▪	LSG, staff learning facilities, the Learning Catalog/new Learning Management Systems and Services were moved to the CLO's office.
	▪	New Key Performance Indicators (KPIs) were instituted for staff learning.
	▪	The CLO's office was assigned oversight of the Bank's operational knowledge management and sharing programs.
FY 2006	▪	The Learning Board was relaunched under expanded terms of reference as the Knowledge and Learning Board in FY06.

GOVERNANCE

2.11 Responsibilities for governing and implementing the new learning agenda have evolved with roles and changes in assignments noted in each of the Learning Board's annual reports. Despite this documentation, interviews with major stakeholders revealed some confusion about who could best serve a particular role or how to best implement certain functions.

Overall strategy and policy

2.12 Final accountability for staff learning rests with the CLO. Each member of the Learning Board, representing the respective SLC or region, has responsibility for the design and implementation of their learning program. The terms of reference for the Learning Board describe "a mix of oversight, advisory, and decisionmaking roles."[5] Key among these roles is establishing overall learning strategy and policy. In addition, the Learning Board has formal operating agreements and procedures in place to specify the membership process and the Board's composition. In contrast to the KLC, not all Board members have been managers, so these specifications were designed to ensure that Board members can participate effectively in strategic decisionmaking and implement policies within their VPUs.[6]

2.13 Several Board members expressed confusion or concern about the Board's composition and functions despite the specifications documented by the Board's terms of reference and operating agreements. Recurring issues include the following:

- *Member Profile.* Some members have an extensive background in learning; some have years of experience in Bank operations; and some have a balanced composition of both. In addition, some members are at more senior levels than others. Several of the stakeholders interviewed suggested clarifying the appropriate profile for a Board member to increase the Board's effectiveness.

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[5] The current roles, responsibilities, and operating agreements for the Learning Board are in Appendix D.
[6] In FY06, the Learning Board was reconstituted as the Knowledge and Learning Board—with members at salary grade GH or higher.

- *Size of the Board.* Meetings often have 20 to 30 members and observers present. Some members felt that this large size, combined with uneven member profiles, made the Board too unwieldy to discuss issues effectively or make decisions.

- *Voting rights.* Members want clear justification for why some VPUs have voting rights and others do not. Some stakeholders also wondered whether votes should be weighted based on the number of staff represented.

- *Meeting Dynamics.* Many members reported that Board meetings are at times ineffective or even contentious. Most attributed meeting problems to the diverse profiles of members and large size of the Board and acknowledged that the CLO had the difficult responsibility of facilitating these sessions.

2.14 Board members and alternates expressed various levels of concern about the Board's effectiveness as a body for staff learning. These stakeholders generally felt empowered to advise their VPUs on setting learning priorities and aligning learning plans with work programs, but some were not convinced that being a Board member augments or complements their VPU-level role. Some were concerned that the Learning Board is not empowered to set learning policy at the institutional level and address crosscutting issues related to learning—despite evidence in meeting minutes that the Board did establish learning policy. Recurring concerns expressed by Board members are presented in table 5.

Table 5. Issues cited in interviews about Learning Board's role and responsibilities

Issue	Examples of Concern
Staffing trends, including the decrease of senior and experienced staff in the field, cause challenges in providing timely and appropriate learning opportunities.	Due to staff turnover, some senior personnel have little Bank experience. In addition, the Bank's organizational changes have included placing different personnel in the field and decreasing the number of senior specialists. Both of these trends present challenges to learning, with less experienced staff meeting with government ministers. One learning coordinator expressed a sense of "never being able to catch up" with the training needs of new staff. Another stakeholder asserted that the high turnover underscored the need for learning roadmaps to ensure that new staff receive core training to understand the Bank's business better.
Resource management needs to be strengthened and standardized.	Some units have designed their own systems or methods for tracking learning allocations and expenditures because "existing tools are inadequate" (especially SAP).[a]
Sector week objectives must be clarified.	Members from SLCs and regions acknowledged that sector weeks are controversial because they absorb a major share of regional staff time under training received and network human resources. Some suggested that decisions about sector weeks should be made at the institutional level, and that much of the tension could be resolved by better defining sector week objectives and identifying which components are learning activities.
The assessment of staff learning needs should be more rigorous and systematic.	Methods to assess staff learning needs vary widely. Some VPUs conduct surveys and have formal coordination with sector boards, while some VPU representatives acknowledged that needs assessments are "not particularly systematic." A few suggested that the Board could help by identifying best practices on needs assessments or tools that could then be applied in other units.

[a] SAP (Systems, Applications, and Products) is the brand name of business-application software that supports many of the Bank's core administrative processes.

2.15   Most stakeholders value the representative nature of the Board and did not argue for a reduced size. However, several argued that using teams or establishing formal subcommittees to focus on action items would increase the Board's effectiveness and participation in decisionmaking.

Resource allocation

2.16   Funds provided for staff learning are used for direct costs (learning design, delivery, and follow-up), learning received (staff time and related travel), and the organizational structures to support staff learning. The allocation of resources for staff learning occurs as part of the Bank's overall budget process. An overview of the institutional processes and budget guidelines for staff learning is in Appendix C.

2.17   With input from a strategic note prepared by the CLO, Bank senior management and the Corporate Resource Management Group (SFRRM) first set the annual corporate amount dedicated to staff learning, as administered by the Learning Board.[7]   The CLO, with advice and input from the Learning Board, then recommends the allocation per VPU and the amounts dedicated for evaluation, learning advisory services, and other costs related to learning. The CLO follows a general formula which has been documented in the Learning Board meeting minutes as shown in box 1.

Box 1. Example of FY05 budget allocation for staff learning

Allocations for FY05 were discussed at a meeting in March 2004 to gain Board advice given the high probability that funding would remain at the FY04 level. The general formula and assumptions used to allocate the budget for FY05 were as follows:

- Regions would be funded at 4 percent of their net administrative budget if possible.
- P&T Network SLC funds would be redistributed using a weighting system. Sixty percent would be weighted to business needs as measured by the percentage of sectors and themes in the regional work programs. Forty percent would be weighted to headcount, including the number of networked staff plus the number of anchor staff. In this redistribution, budget reductions would be limited to 15 percent, and increases would be limited to 10 percent.
- Management and Process and Interaction (P&I) SLCs would be cut by 10 percent.
- The amounts for all other units would be held constant.

Source: Learning Board meeting minutes, March 18, 2004

2.18   SLCs distribute funding across their programs according to business priorities, and regions distribute funding based on team learning needs, regional priorities, and individual needs. This happens as part of the process to develop VPU learning plans (described below).

2.19   Stakeholders reported that tracking costs is a challenge, in part due to complex budget reports and procedures in SAP (the Bank's accounting system), other user and system errors in data entry (including participant errors in assigning costs to staff learning), and the lack of financial management experience of many Board members.

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[7] Individual units and VPUs can dedicate additional resources to learning from other funds in their base budgets.

Abilities to track costs vary, with some VPUs doing this well and others doing it inadequately. WBIEG is studying cost effectiveness for the Board.

2.20   Many Board members expressed concern about the budget allocation process, both because the formulas for allocating funds are unclear and because members have a vested interest in the budget allocations to their own VPUs. Some members noted that competing interests linked to negotiating funding impede the Board's development as a community of practice. One recurring suggestion was to appoint an advisory board or council with authority for policy and budget matters. Suggestions ranged from having a few senior managers in the Bank meet on a quarterly basis to convening an external body comprised of experts from the academic and private sector.[8]

Communication

2.21   The SLF's designers noted that "the Bank has never had a well-articulated learning strategy in the past," and that a critical step for the new framework is "to develop a clear vision and strategy for learning that is widely communicated, accepted by all, and forms the basis for the design and delivery of the learning program" (World Bank 2001b). Developing a communications strategy was an early priority for the CLO and Learning Board—with quarterly and annual reports, a new staff learning website, a series of intranet "kiosk" announcements, a new brochure, briefings to key VPUs, articles in the Bank's internal web news brief *Today,* and evaluation results posted on the staff learning and WBIEG websites all part of a new strategy starting in FY02 (World Bank 2003a).

2.22   Board members are expected to provide information and guidance to staff on the Bank's learning initiatives, and individual VPUs have their own strategies for communications on staff learning. As a general rule, the SLCs and regional learning committees notify staff about upcoming learning opportunities by listing the activities in the Learning Catalog and sending e-mail announcements of upcoming events. Board members send e-mails to their VPUs announcing key policy decisions or new major initiatives. The CLO's office sends notices on new developments and best practices related to staff learning and has implemented communication activities such as hosting a learning fair. Also, WBIEG circulates WBI Evaluation Briefs related to staff learning evaluations to all Board members.

2.23   When discussing communication strategies, several Board members noted that efforts to inform personnel about staff learning should be further refined given the heavy reliance on written notices that Bank staff are too busy to read. The most common suggestions for improving communication included having a Learning Board representative (e.g., a member of the CLO's staff) visit staff meetings within VPUs and assigning managers formal responsibilities for informing their employees of appropriate learning opportunities, changes that were already implemented during FY02-FY03.

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[8] The newly established Knowledge and Learning Board will have a Governing Council to provide corporate oversight. The Bank's Managing Director will appoint no more than five directors drawn from various parts of the Bank. The council will meet at least twice yearly.

2.24   Intensive efforts to develop systems to track and support learning and link learning activities to business objectives have marked the first phase of the new SLF. Any assessment of the SLF's success or accomplishments thus far (chapter 3) must be based on an understanding of the creation and refinement of the interrelated systems designed to ground learning in results.

Facilitating learning and knowledge sharing

2.25   Over time, the CLO and Learning Board have developed and improved systems to capture and track learning activity and cost data. These systems serve important monitoring purposes but also work to link staff with appropriate learning opportunities and provide data for WBIEG studies. Major examples include the following:

- *Learning catalog*: This central resource on learning opportunities was developed prior to the SLF but was improved since FY02.[9] The online catalog allowed staff to search for activities and to register for those of interest. Providers were able to manage the registration process through the catalog and send records to PeopleSoft (the personnel data system) based on successful completion of course criteria. The catalog was criticized for many data inaccuracies (largely due to the uneven use by learning providers), but it served as the functional precursor to a full Learning Management System.[10]

- *Business warehouse staff learning cube*: The CLO and Learning Board have focused repeatedly on addressing the problems of inaccuracy in archival data on staff learning. Following the rollout of the revised catalog in FY03, the Learning Board has worked with ISG and SFRRM to develop a staff learning cube (a tool to manipulate data from databases including the Learning Catalog and SAP) within Business Warehouse (BW), the Bank's central database recording activity, personnel, and cost data. The Bank's learning community gained access in FY05 to data collection and reporting functions available through BW; however, data quality issues remain given problems with the Learning Catalog (discussed above) and difficulties linking costs to activities.[11]

- *Learning management system*: In early FY06 a full learning management system (LMS) was implemented, eliminating the need for the Learning

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[9] The Learning Catalog, developed by WBI, was used for client learning until being revamped under the Learning Board to serve staff learning needs.

[10] Learning activities in the field were often not reported in the Learning Catalog. In addition, learning activities that are team-based or have coaching or other less traditional formats have been historically underreported according to the Learning Board's annual reports and interviews with stakeholders. Incremental enhancements have been made over time to improve data quality—for example, streamlining the data-entry process to record one-time events.

[11] The CLO's office continues to recognize and address data issues for continuous improvement. Examples of unreliable data fields include the one for the number of participants who actually attended an event versus the number who were expected. Since some providers automatically enter the same number for both, it is impossible to analyze accurately supply and demand issues using BW.

Catalog. The LMS is expected to benefit staff learning in three ways. First, all the SAP and LMS links will be automated, so that when staff register for learning events, PeopleSoft will record the relevant data automatically. Second, the LMS will link directly to technology tools such as the Bank's e-learning platform. The system will therefore track all activities that use the e-learning platform and all participants who register for these events. Third, the LMS will include roadmaps or guidance on professional pathways for staff. This learning advisory service will use staff profiles to provide information on what knowledge and skills are needed to meet the objectives of an individual's work program and for career advancement. The development of the LMS is part of an initiative (the Knowledge and Learning Environment) to integrate the Bank's staff learning and knowledge management/sharing activities and ensure that these are directly relevant to operational staff.

Aligning learning activities with business needs

2.26   The CLO and Learning Board have also instituted processes across the Bank to support business-driven staff learning. Key among these is the development of VPU learning plans. Progress towards implementing the Bank's Strategic Framework is monitored at the corporate level, and staff learning is recognized as a critical ingredient in the twin pillars of the Bank's approach—building the climate for investment, jobs, and sustainable growth, and investing in and empowering poor people to participate in development (World Bank 2003b).

2.27   Each VPU prepares a learning plan based on business priorities, staff learning needs, and budget. Learning plans include details of planned activities, budgets, and timetables. In keeping with a decentralized approach, procedures for developing the VPU learning plans vary widely depending on the region, SLC, or other type of unit. VPUs establish their own processes for assessing their priorities and for identifying staff learning needs. These systems rely on formal bodies such as regional learning committees and sector boards and draw on institutional processes such as individual learning plans submitted by staff. Units typically gather additional information about staff learning needs through staff surveys, focus groups, and informal conversations with managers.

2.28   Staff members in the CLO's office review the learning plans and monitor progress against them through quarterly business reviews. The CLO and Learning Board have established standard templates and processes for the development of VPU learning plans and quarterly reports, facilitating the link between learning activities and business objectives across all Bank units. Minutes from Board meetings indicate that these tools have been improved based on member feedback, and new systems are developed to streamline monitoring efforts. For example, the Board approved a monitoring process in July 2002 wherein learning events that cost $20,000 or above require an Activity Initiation Summary (AIS) in SAP. In FY06, the Board proposed increasing this amount to $40,000. Data entered into the AIS then are recorded automatically in the Learning Catalog.

2.29   The Learning Board is responsible for ensuring the systematic monitoring and evaluation of learning activities. Since FY02, the Board has provided funds to WBIEG for this function. In FY05, WBIEG costs represented 1.4 percent of the learning budget of $69.5 million. A breakdown of funds from FY02-FY05 is found in table 6.

Table 6. Learning Board funds spent by WBIEG for monitoring and evaluation work (including overhead costs)

Fiscal Year	Amount ($)	Percent of Total Staff Learning Budget (Actual)
02	696,861	1.0%
03	977,090	1.4%
04	1,035,026	1.3%
05	972,473	1.2%

2.30   This emphasis on evaluation distinguishes the SLF from previous arrangements for staff learning, and WBIEG has refined evaluation practices and methods during the first phase of the SLF.

Level 1 evaluation

2.31   Level 1 evaluations identify participants' reactions to learning activities. WBIEG conducts these evaluations on a stratified random sample of staff learning events and provides an on-line level 1 toolkit for learning managers to apply a similar process to nonsampled courses. Current and former Board members generally characterized level 1 as a monitoring activity: favorable ratings by participants at the end of an activity do not link directly to impact, but positive outcomes are unlikely to occur in the absence of basic quality. WBIEG has improved the level 1 process and developed tools over time:

- *Sampling:* A rigorous stratified random sampling process has replaced volunteer and convenience samples. In FY03, courses were eligible for selection if (a) they were registered as formal events in the Learning Catalog two weeks before the activity's starting date, (b) Bank staff comprised at least half of the attendees, (c) the delivery mode was face-to-face or distance learning, and (d) WBIEG had not evaluated the course already in that same year.[12]   In FY04, selection was stratified by the sponsor VPU for the first time, ensuring that enough courses would be selected per unit to permit valid inferences regarding differences among sponsors.

- *Toolkit:* WBIEG provides materials for units to administer their own level 1 questionnaires for nonsampled activities. Many learning stakeholders noted that this toolkit serves important functions in facilitating level 1 evaluations

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[12] Problems with the timely administrator entry of activities in the Learning Catalog have provided some challenges to this process. Ongoing systems improvements allow for a greater percentage of all learning activities to be recorded, which supports more accurate sampling techniques each year.

and maintaining consistent measurement across subunits. WBIEG provides technical assistance in this process, sending team members to speak at staff meetings, supporting providers in scanning their questionnaires, and helping with analysis.

- *Quality reports and interactive website*: WBIEG provides trainers with level 1 results, usually within two weeks after the activity's completion. WBIEG recently launched an interactive website where course results can be viewed, aggregated, and compared with other results from the same or other course providers. This website generates reports comparing results across VPUs, across individual course providers, or across courses of the same provider over time. The system contains level 1 data from FY04 to the present.

2.32   Since the Learning Board was instituted, WBIEG has established a standard questionnaire to track level 1 results across years, increased the coverage of activities (from 140 activities in FY02 to 307 in FY05), and added two questions to support comparison with benchmarks from the American Society for Training and Development (ASTD).

Program evaluation

2.33   In addition to assessing participant reactions, WBIEG establishes a work plan with the Learning Board each year to determine whether participants acquired new skills, knowledge, or behaviors and then used them on the job with a positive impact on operational products or processes.

2.34   The selection of programs for evaluation has focused on (a) "high priority" programs of various SLCs, (b) regional programs, and (c) network programs. "High priority" programs are those that have required a major investment of resources and are designed to address specific challenges that precipitated the establishment of the new learning framework (e.g., Introduction to Bank Operations, New Managers' Leadership Program, and Multisectoral Teams Program). Regional programs comprise all learning offered to or undertaken by regional staff (e.g. East Asia and the Pacific Regional Program, South Asia Regional Program). Network programs comprise all learning offered by the Network Anchors/Hubs (e.g. HD Staff Learning Program). Other studies have examined the effectiveness of innovative approaches (e.g., the e-learning program for Trust Fund Accreditation). Table 7 lists the evaluations completed to date for each VPU.

Table 7. Focus of WBIEG evaluations, by year of completion

Activity Sponsor (VPU)	FY03	FY04	FY05
Region			
AFR			
EAP/SAR		• Staff Learning in EAP/SAR Regions—Phase I	• Staff Learning in EAP/SAR—Phase II
ECA			
LCR			
MNA			
Strategic Learning Center			
ACS		• Building Your Skills in a Team-based Environment	
ESSD	• Nonformal Learning in Professional Technical Networks, 2000-2001	• Sector Fora, FY02	
FSD			
HDN	• Nonformal Learning in Professional Technical Networks, 2000-2001	• Human Development Forum • Sector Fora, FY02	• Human Development Network Staff Learning Programs
ISG			
Management	• The Individual Coaching Program, 2000-2002 • The Challenge of Leadership Seminar, 1999-2002 • Communication as Power: Listening, Inquiring, Feedback	• Managing a Country Office	• The New Managers' Leadership Program
OPCS		• Introduction to Bank Operations (IBO) (Learning) • Introduction to Bank Operations (Impact) • Sector Fora, FY02	
P&I (Client Engagement and Teams)	• The MTL Program (29 Pilot Teams)	• MTL Program (Phase 2 Evaluation) • MTL (TEAMS) Program Phase 3	
PREM	• Nonformal Learning in Professional Technical Networks, 2000-2001 • PREM Staff Training Programs	• Sector Fora, FY02	
PSI (now INF and PSD)		• Sector Fora, FY02	
Other			
RMC	• Trust Fund Learning and Accreditation Program (TLAP) Pilot	• Trust Fund Learning and Accreditation Program (Review of exam quality)	• TLAP Impact Evaluation
HRS	• Part II Women's Mentoring Program for Valuing Diversity		

2.35   Since the start of the SLF, WBIEG efforts to refine evaluation methods and practices have resulted in better tests of participant learning and improved evaluation designs.

Level 2 tests of learning

2.36   WBIEG conducts level 2 evaluations to identify learning outcomes by administering objective multiple-choice tests at the start and end of the learning activity. Since the start of the SLF, WBIEG has tested learning for only two programs (IBO and TLAP).[13]   Some Learning Board stakeholders expressed a strong interest in developing and administering valid and reliable tests of learning outcomes for other programs, but time and cost considerations and buy-in from course providers have limited these efforts. Refinements in the measurement of learning since the SLF was established have included better test forms and reliability.

- *Parallel forms*: Prior to FY02, pre and posttests were prepared from a single item pool, where questions were randomly assigned to test forms. This random assignment did not ensure that each test included items for all topics of a learning event or that item difficulties were comparable across both forms. To improve comparability, WBIEG developed a two-dimensional matrix covering content topics and levels of difficulty. This was further improved in FY03 when the evaluators issued guidelines for pairing items to improve the parallelism of pre and posttests.

- *Reliability*: WBIEG analyzed the internal reliability of tests and found that those administered in FY99-FY01 were well below professional standards (Lockheed 2004).[14]   The evaluators improved the reliability by using statistical item analysis of previous tests to clarify questions, increasing the number of items to make the test better represent the course content, and providing guidance on test development to training providers.

Evaluation designs

2.37   WBIEG has improved the designs of program evaluations to assess the outcomes and impact of staff learning programs. These improvements include the use of counterfactuals, multivariate analyses, and mixed methods (Lockheed 2004).

- *Use of comparison groups or counterfactuals*: WBIEG has used two types of counterfactuals or "control groups" to assess the effectiveness of staff learning. The evaluators have conducted postlearning matching of participants with nonparticipants through propensity-score matching or other types of trait-by-trait matching techniques and prelearning matching of participants with other similar nonparticipants scheduled for subsequent participation.[15]

- *Analysis*: The use of counterfactuals and scientific sampling has led to increasingly sophisticated analysis in contrast to the simple descriptive

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[13] WBIEG conducts level 2 evaluations for client learning programs also.

[14] The average reliability coefficient was about 0.44 with a range of 0.10 to 0.70.

[15] Propensity score matching is possible when data exist for a large number of individuals, only some of whom have participated in the learning event. This technique estimates the probability of an individual's participation in a learning event.

statistics used previously or the summaries of interviews and focus groups used for single learning events. Instead, multivariate analyses are used to test hypothetical models of the determinants of effectiveness.

- *Mixed methods:* Both qualitative and quantitative methods are integrated now into study design. Using mixed methods allows evaluators to confirm findings from multiple perspectives and data sources and to address a broader range of evaluation questions.

2.38 Several current and former Board members noted that the evaluation practices of WBIEG have evolved over time, and concerns expressed by individuals generally focused on not being able to secure WBIEG services for evaluating the impact of specific learning initiatives in their VPUs. WBIEG has declined to conduct evaluations for staff learning in three ways: (a) by not evaluating all courses at level 1 and using a stratified random sample instead, (b) by not conducting level 2 evaluations when there was no buy-in from the course provider, and (c) by not conducting level 3-4 (outcome and impact) evaluations beyond those financed through the Learning Board when neither staff nor resources were available.

2.39 In addition to focusing on individual programs, WBIEG conducts general studies and metaevaluations to examine patterns across studies and to identify best practices to inform learning design and delivery efforts. Some Board members observed that such efforts to isolate factors for success or to describe effective learning design features are especially helpful for planning "cutting-edge" network events that are unlikely to be offered more than once.

2.40 The overview and processes of the new framework described in this chapter do not represent an exhaustive list of the systems and initiatives undertaken for staff learning since FY01. The discussion has focused largely on key Bankwide initiatives, but it is important to note that many other systems and approaches have been attempted or implemented at the VPU level. In total, the interrelated set of processes that have evolved over the past four years now serve key functions in the new framework, monitoring quality and assessing impact to inform and improve the design and delivery of learning activities.

3. RESULTS OF THE NEW STAFF LEARNING FRAMEWORK

3.1   The new SLF emerged as a necessary corollary to the Bank's changing business strategies. A broad set of competencies—beyond individual technical expertise—was identified as integral to the success of the Bank's evolving work. The SLF's objectives were not set forth as discrete measurable targets but instead represent conceptual shifts that link learning to business results. The broad objectives lack clear definition by design to accommodate the diverse needs of a decentralized system. For example, new forms of pedagogy such as e-learning gain priority insofar as they comprise an effective means for engaging staff in the field and providing high quality learning opportunities. The goal is not to achieve a quota of e-learning activities but rather to increase the strategic use of new forms of pedagogy to create effective learning activities for working adults.

3.2   Any assessment of progress toward the SLF's objectives must acknowledge that they are interrelated. Efforts to develop needed managerial skills, for example, focus not only on prioritizing certain learning content but also on incorporating innovative practices such as the use of coaching and mentoring. Despite the crosscutting nature of each objective, some indicators can be identified to gauge progress, and these are discussed throughout this chapter. VPU-level analyses to assess whether the SLF has had an effect on the business results of the Bank were not possible within the scope of this review.

3.3   The SLF has had mixed experience in terms of achieving progress toward some objectives (table 8).   However, the new framework does represent a fundamental change to ground learning in results, and measurable progress may therefore require more time than has elapsed to date. Difficulties exist in assessing progress because of the lack of both pre-SLF data and specific indicators against which to measure change.

Table 8. Overview of progress towards SLF objectives

SLF objectives (as in table 2)		Data source(s)	Evidence of progress towards objective since the SLF establishment in 2001
From	*Towards*		
Learning Objectives: Build Technical Excellence	Build Capacity to Create Results	▪ WBIEG evaluation results ▪ Interviews ▪ VPU learning plans	VPU Learning plans link activities to work programs. Some participants use what they learned in their jobs, and three programs have resulted in operational impact. Not all types of activities have been evaluated.
Content Focus: Professional Sectoral Skills	Sustained Professional Expertise with More Behavior, Integrative, Operational and Managerial Skills	▪ Learning Board reports ▪ Interviews ▪ WBIEG evaluation results	New staff learning initiatives address priority areas. Evaluation results inform program improvements.
Learner Focus: Individual Headquarters (HQ) Staff	More Teams, Country Office Staff and Joint Client/Staff Teams	▪ Administrative data (BW and Learning Catalog) ▪ Learning Board reports	Administrative data are insufficient to assess progress. Team-based learning is not recorded. BW data and Board reports reflect no significant increases in the participation of country office staff and in the percentage of joint client/staff activities.
Pedagogy: Classroom Learning	New Forms of Pedagogy (e.g., peer learning, action learning, e-learning)	▪ Administrative data ▪ Learning Board reports	No recorded, significant increases have occurred in the use of new forms of pedagogy as a percentage of all learning activities; however, new initiatives such the Trust Fund Learning and Accreditation Program (TLAP), using e-learning, have modeled effective practices.
Structure: Little Accountability, Learning Silos	Ownership/ Accountability Demand driven, Cross-Boundary	▪ Learning Board reports ▪ Interviews	The new organization is now in place. Although administrative data do not reflect significant increases in the percentage of joint VPU offerings overall, formal collaborations have been established within the new learning structure (e.g., Asia Learning, ECA-MNA, PREM-DEC)
Culture: Side Line, I Don't Have Time!	Business Line, Learning Matters!	▪ Interviews ▪ Staff surveys	Learning is becoming more valued within the Bank's culture.

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GROUNDING LEARNING IN RESULTS

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3.4 As described in chapter 2, the SLF's first phase focused on clarifying roles and responsibilities and developing or refining systems and processes. Concrete accomplishments to date can be accurately appraised only within the context of the new paradigm: the various systems and processes do not just provide auxiliary support but actually create the pathway to results. The framework (figure 3) tracks products and quality rather than just monitoring dollars—with systems data, lessons learned, and evaluation results all serving as part of a feedback loop for continuous improvement.

Figure 3. Centralized functions to improve learning design and delivery

Learning Plan Development Process

Information / Knowledge Management Systems (Learning Catalog, BW, LMS, etc.)
- Guiding participants to activities and knowledge resources
- Tracking activity and participant data

Level 1 Monitoring: Quality ratings

Level 2 Evaluation: Knowledge gain

Level 3 and 4 Evaluation : Outcome and Impact

Decision Factors
- Budget allocation
- Work programs
- Staff needs
- Evaluation findings

Priorities
- Quality (usefulness, relevance, etc.)
- Participation (especially regional staff)
- Expenditures for staff learning

Learning Plans

Learning Activities
- Design and delivery features
- Participant characteristics

OUTCOMES

Short Term	Medium Term	Longer Term
▪ Knowledge gain ▪ Familiarity with resources ▪ Cultural awareness ▪ Network of contacts ▪ Increased technical expertise	▪ Change in behavior ▪ Ongoing link to resources ▪ Intact team focused on business results ▪ Positive client engagement ▪ Effective leadership	▪ Improved business lines and products ▪ Institutional capacity enhancement ▪ Policy changes

System Review
Quarterly and annual reporting
Ongoing Learning Plan Review

Metanalyses and General Studies
(such as *Features of Staff Learning that Contribute to Effectiveness at the World Bank*)

3.5   A few of the stakeholders interviewed for this study emphasized that innovative and effective approaches to staff learning had been implemented well before the new framework but that they occurred largely as a result of learning specialists working in isolation. The current structure tracks efforts in the various VPUs and links expertise to promote outcomes over time. The cycle of processes to guide resource allocations represents a major distinction between the SLF and previous arrangements for training in the 1990s. Given this fundamental shift, current results cannot be compared with data from the previous system in most cases.

MONITORING: INDICATORS FROM ADMINISTRATIVE DATA

3.6   Administrative data systems serve key functions in the new framework, tracking learning activities, guiding participants to relevant events, and capturing participant characteristics. These data inform course providers and support the evaluation of outcomes and impacts. The office of the CLO has worked to improve data quality since the SLF's inception and actively works each quarter to reconcile data reported by VPUs with those recorded in the administrative systems.

Numbers of events

3.7   In quarterly and annual reports, the Learning Board provides a snapshot of activities to date, often in the format shown in table 9. While this presentation focuses mainly on outputs (numbers of events and participants), it also provides an overview of how efforts are focused on the priorities identified at the start of the SLF, particularly the recommended shifts in content areas. For example, the need to develop core operational

skills was a challenge noted at the end of the KLC, so the Learning Board specifically identifies which activities have been created or redesigned in response and what the respective participation levels are.[16]

Table 9: Learning at a glance—FY03 to FY05

	FY03		FY04		FY05	
Learning Activities **(number of events)**	2546		3298		2861	
Delivered in the United States	2251	88%	2785	84%	2447	86%
Delivered around the world	295	12%	513	16%	414	14%
New Operational Learning **(number of participants)**						
MTL/TEAMS Program[a]	630		600		1360	
Introduction to Bank Operations[a]	293		381		394	
Regional Operations Courses	217		776		783	
Trust Fund Accredited Staff[a] (cumulative)	1880		2417		2864	
Client Engagement Curriculum **(Participants)***						
Team Leaders	--		238		1111	
ACS Staff	--		393		375	
Language Program **(Participants)**	797		1055		1142	
Management Learning Events **(Participants)**						
New Managers Leadership Program[a]	100		165		260	
Workshops[a]	372		303			
Coaching	210		238		264	
Peer Learning for Managers[a]	22		99		110	
ACS Learning Events[a]						
Number of events	47		68		66	
Number of participants	617		1161		1260	
Evaluation of Learning Events[a]						
Number of Level 1	222		316		307	
Number of Level 2-4	16		14		10	
Percentage of Participants Rating Activity 4-5 (1-5 scale)	85		89		87	

[a] New programs created or significantly changed since the start of the Learning Board.

Event types

3.8   Several Board members and other stakeholders noted that one important step in measuring progress towards the SLF's objectives would be to examine the overall distribution of learning event types and identify whether the emphasis has shifted over time. The new framework promotes new forms of pedagogy to better meet the needs of working adults, so examining whether other delivery methods have replaced traditional classroom learning is one method for gauging progress.

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[16] In some cases, the data reported in the annual and quarterly reports are not in the administrative systems. The CLO's office explained that "the data were simply never entered and therefore are not in the BW reports." This was particularly true for language learning, communications, and some management training.

3.9   Comparable data regarding event types from the pre-SLF era were not available for this study, largely because a key accomplishment of the new framework has been to establish the needed systems and processes to track these data over time. Information on event types has been systematically recorded in BW since FY03, however, and the Learning Board notes known discrepancies or inaccuracies in its reports along with plans for improvement.

3.10   Overall, the distribution of event types as recorded in BW has not changed significantly over the past three fiscal years (figure 4), but the following caveats should be noted: [17]

- There have been some programmer errors in tracking e-learning activities. For FY03 and FY04, the 250 listings for e-learning offerings were reused instead of archived, meaning that these activities are now underreported in BW. Furthermore, in FY04 and FY05, only e-learning course completions were listed in BW. There are many more e-learning activities "on offer," or available, that are not reported. Historic data reported in the Learning Board's annual reports have been valuable in estimating activity levels.

- Learning events offered outside of Washington, D.C. were often not recorded in the Learning Catalog because they were intended to attract only local audiences. Data from these unrecorded events do not appear in BW.

- Less traditional modes of delivery are also likely to be underreported in BW. Interviews indicated that the coaching, mentoring, team-based learning events, and retreats may not be entered in the Learning Catalog, making it difficult to assess how frequently these modes are used and with what results.

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[17] The numbers reported here from BW are only at the aggregate level. An analysis by VPU conducted for this study was deemed inaccurate due to problems with double-counting.

Figure 4. Distribution of staff learning activities, by event type (FY03-FY05)
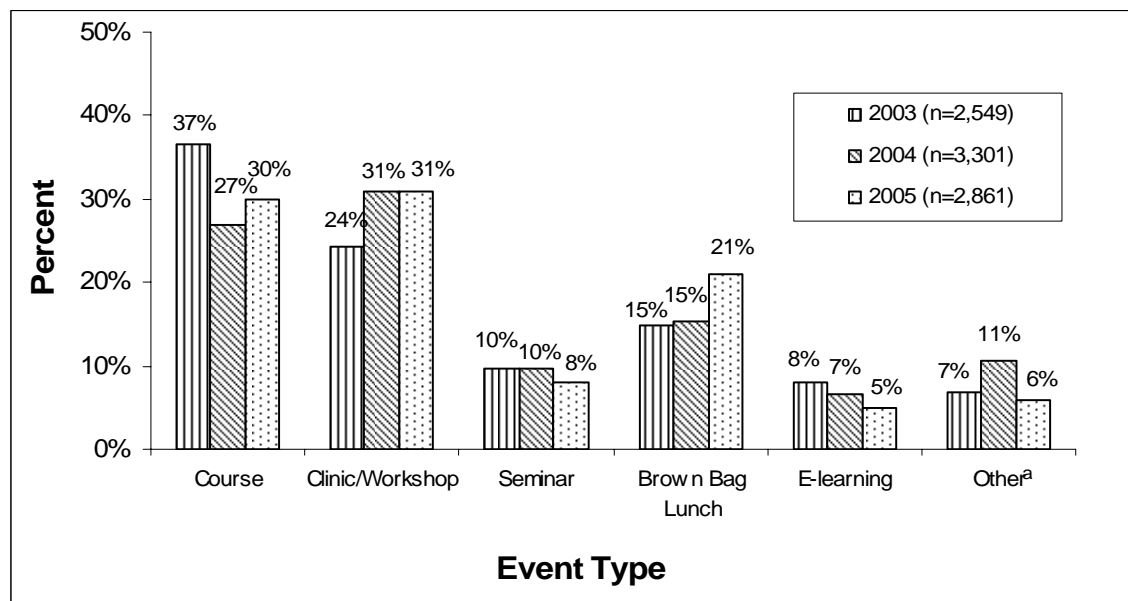
ᵃThe "other" category includes conferences, meetings, retreats, sector weeks, study tours, coaching, team-based learning, and video conferences.

3.11   Traditional forms of staff learning (courses, workshops, seminars) still dominate the mix of event types, but the Learning Board is working to increase on-the-job learning opportunities through the use of teams, coaching and mentoring (captured as "other" in figure 4). The Learning Support Group (LSG) has been supporting instructional design and quality, assisting VPUs by identifying opportunities for developing customized e-learning programs. Despite these efforts, according to the Learning Catalog, the share of e-learning has declined slightly. This does not include the off-the-shelf e-learning libraries that the Bank has purchased over the last several years (e.g., e-Tutor and the Harvard Business Series). LSG worked with OPCS, HRS, the Management SLC, and Client Engagement and Teams in FY05 to develop new e-learning modules, with a total of 70 new modules scheduled for implementation by the end of the fiscal year.

3.12   The breakdown of event types provides a useful overview of staff learning activities, but these numbers alone cannot be used to assess progress toward the SLF's objectives. Effective practices using the new forms of pedagogy—such as e-learning and team-based programs—have been identified though the new continuous feedback cycle, and these activities are examined below.

Participation

3.13   One of the explicit challenges facing the SLF is how to deliver effective learning events to staff in the field who, in many cases, are the ones working directly with the Bank's partners in developing countries to achieve business results. Reaching staff in country offices has become more important with the decentralization of the Bank's business, and innovative practices have included the establishment of hub (region-based)

trainings and offering learning activities in country offices targeting regionwide audiences. Nonetheless, the percentage of learning activities held outside of North America has not significantly increased since FY03.[18] These data show a decrease in the proportion of events held in the field, from 30 percent in FY03 to 16 percent in FY04 and 14 percent in FY05. However, these numbers do not accurately reflect the involvement of country office staff. Many local learning activities in country offices have not been recorded in the Learning Catalog.

3.14   Reaching country office staff is one of the SLF's key objectives. The Learning Board encourages the SLCs and regions to direct more resources to the field through various means, including competitions to fund innovative learning initiatives. In its FY04 annual report, the Learning Board noted that less than 10 percent of professional and technical SLC learning events were located outside of the Washington, DC area or delivered through distance learning. As a result, the Board asked that at least 20 percent of each SLC's learning programs for FY05 be "in a form readily accessible to country office staff, either through a decentralized location or some form of e-learning" (World Bank 2004a). In FY05, 14 percent (414 of 2,861 activities) occurred outside the United States, and 5 percent (137) were e-learning.

3.15   The SLF objectives also specify that some events should target staff and clients together, where such interaction makes sense. Increasing the activities offered jointly for clients and staff is a priority for the Learning Board, but the overall percentage of joint client-staff events decreased from FY03 (20 percent) to FY04 (11 percent) and FY05 (12 percent), according to data from the Learning Catalog. WBIEG recently examined these data and found that many activities were mislabeled in the catalog as client-staff when in fact they included no or few clients. According to this study, only 5 percent of learning activities in FY05 involved interaction among clients and staff (Quizon, Gunnarsson, and Rajakaruna 2005). Two possible explanations for the low figure include difficulties with mixing separate budgets for staff training and client training and the lack of incentives among course providers.

3.16   The Learning Board tracks participation in learning events and recognizes that trends in participation provide important information about the accessibility of activities and the learning culture at the World Bank. In FY05, the Learning Board reported that 82 percent of Bank staff attended at least one formal learning event, up from 80 percent in FY04, with staff attending three or four activities on average. Eighty-eight percent of Washington staff attended at least one learning event, and about 71 percent of field staff participated in at least one activity. While 88 percent of GF-GG (higher level) field staff participated in at least one activity, only 56 percent of ACS (administrative) field staff attended at least one learning activity.

3.17   In FY05, the Learning Board established KPIs to measure progress. Two of these track participation in staff learning activities:

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[18] The percentages included here are those reported in the Learning Board's annual reports. This annual reporting involves an extensive review process, so these figures were assessed to be most accurate. They are not necessarily the same as the numbers recorded in BW or the numbers reported by the Learning Board on a quarterly basis, including the fourth quarter retrospective reports.

- Percentage of all staff participating in one or more learning activities over the last 12 months (by VPU), and

- Percentage of regional staff participating in two or more learning activities over the last 12 months (by region).

Starting in the third quarter of FY05, these indicators are a part of formal reporting. The data in the Learning Board's third quarter report show that an increasing percentage of staff overall are attending at least one learning event per year, with nearly three quarters (73 percent) having participated in the past 12 months. However, the percentage of regional staff attending two or more events fell in FY05 to 41 percent (figure 5).

Figure 5. Key performance indicators for staff participation in learning events
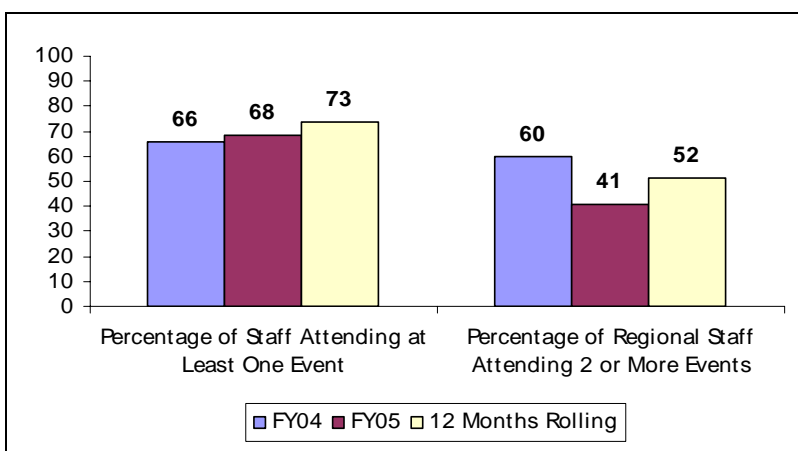
Source: Learning Board Annual Reports

Joint-VPU offerings

3.18   One key goal in creating a decentralized framework for staff learning is to break down the "supply silos" that provided learning activities under pre-SLF arrangements and foster collaboration to avoid the duplication of effort in addressing staff learning needs. The number of jointly sponsored courses is potentially a useful indicator of whether the previous silos are beginning to break down, but these numbers must also be placed in context. The SLCs were designated to clarify accountability for specialized priority areas. In many cases, collaboration in specialized areas may not make sense. As one Learning Board member noted, "It is not enough for teams to be well-behaved and culturally appropriate; they also need specialized technical expertise."

3.19   Tracking the number of jointly sponsored learning activities across years relies on data from the Learning Catalog.[19] Revamping the Learning Catalog was a major

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[19] Joint offerings are problematic in the BW staff learning cube. There is a "joint offering" field, but this must be manually entered and is considered unreliable by the CLO's office. Also, this field was not added until FY04. The Learning Catalog offers more reliable data on joint sponsorship. Course administrators have an incentive to list all VPU fields because the VPUs listed determine when the offering appears in searches by participants.

accomplishment under the SLF, so no comparable data are available for joint VPU activities under the KLC or previously. An analysis of entries in the Learning Catalog shows that the overall percentage of jointly offered learning activities has not changed significantly from FY03 (8 percent, or 196 of 2,546 activities) to FY04 (7 percent, or 220 of 3,298 activities) and FY05 (5 percent, or 150 of 2861 activities) (figure 6).[20] However, some collaborative arrangements have been formally established within the new learning structure, most notably the assignment of a single learning coordinator for both EAP and SAR (Asia Learning).

Figure 6. Types of joint-VPU collaboration for staff learning

Type	FY03	FY04	FY05
a. SLC + Region	4	38	33
b. SLC + SLC	14	42	11
c. SLC + Other	122	73	55
d. Region + Region	41	35	37
e. Region + Other	0	1	5
f. Region + SLC + Other	0	21	0
g. Other + Others	15	10	9
Total	196	220	150
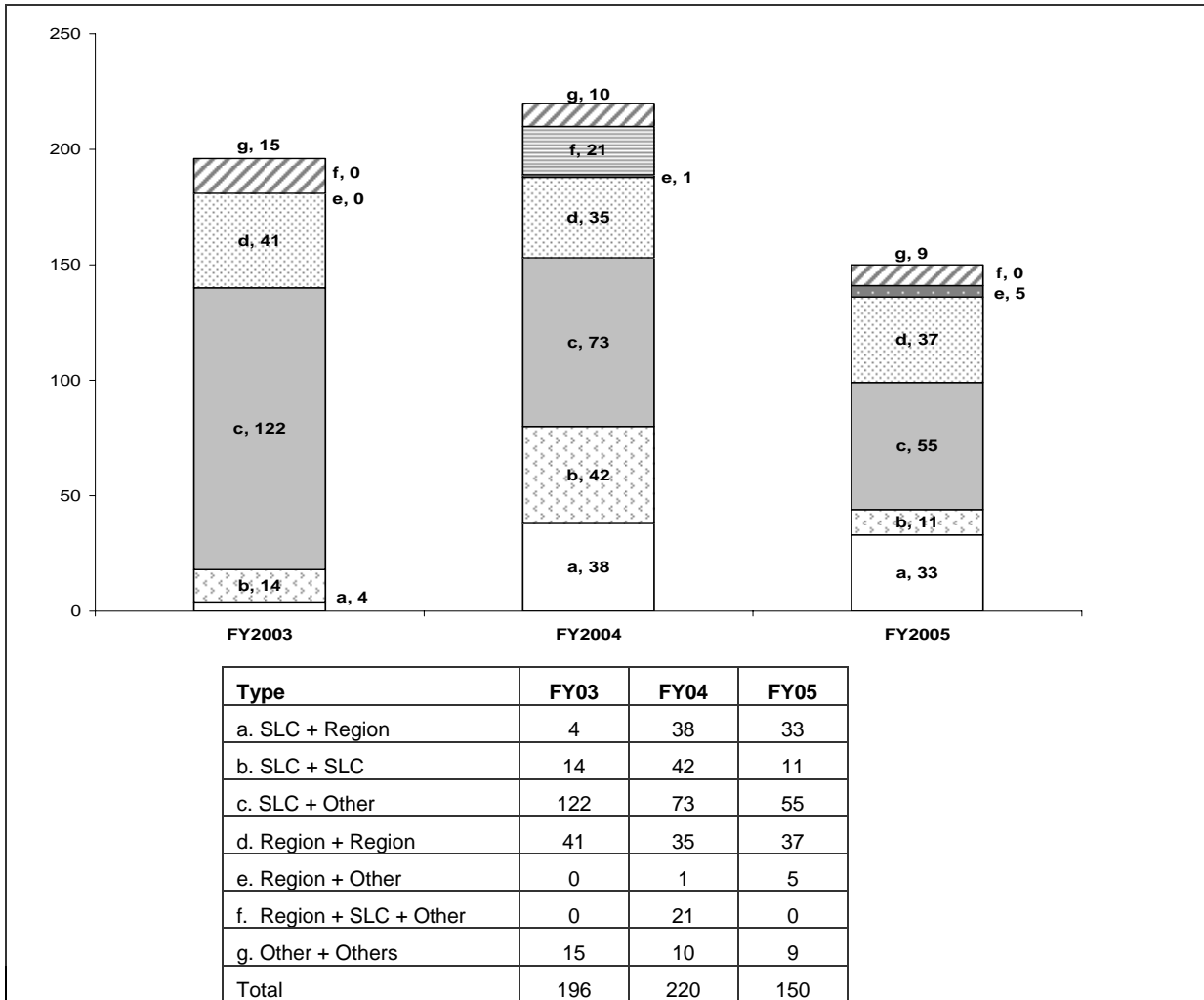
3.20   According to the Learning Catalog, more than three quarters (77 percent) of jointly sponsored events in FY03 reflected collaboration between SLCs or other nonregional VPUs—indicating that regional programs were not officially benefiting from expertise outside of their regions. The major subset of FY03 collaborations were those offered by PREM and DEC together (22 percent). Joint activities between regions

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[20] Events listed with multiple VPUs were not counted if all of the VPUs included were identical.

occurred only between EAP and SAR (15 percent) through the new structural arrangement where they share a single learning coordinator. The remaining collaborative activities were offered jointly by SLCs or other VPUs and regions (8 percent).[21]

3.21   Between FY03 and FY05, there has been a shift towards increased collaboration with or among regions. In FY05, regions were involved in half of all joint offerings, marking a steady increase over FY04 (43 percent) and FY03 (23 percent).

Expenditures

3.22   The Learning Board has also started to track KPIs related to expenditures for staff learning:

- Staff learning expenditures (on a quarterly basis by VPU);
- Expenditures for delivering learning as a percentage of salaries; and
- Learning expenditures as a percentage of administrative budgets.

Current spending levels for staff learning are in line with best practice learning and knowledge organizations globally. As shown in table 10, and later in chapter 4 on benchmarking, the Bank's investment has exceeded the average ASTD benchmark for spending (learning delivery costs at 2.2 percent of salary costs) in all years since the Strategic Compact (FY97) (World Bank 2005). Importantly, the Bank's FY05 investment of 4.1 percent of salary costs matches that of an elite group of 24 ASTD best practice organizations, which have a 4.16 percent average. For FY03 through FY05, the amount spent on staff learning exceeded the budget allocation—indicating that VPUs were willing to dedicate funds from other sources.

Table 10. Investment in staff learning, FY98 to FY05 ($ millions)

	FY98	FY99	FY00	FY01	FY02	FY03	FY04	FY05[a]
Learning Delivered ($)	38.3	37.2	32.4	26.7	27.7	37.9	40.1	40.9
Learning Received ($)	35.0	36.4	46.9	26.8	36.0	37.4	41.6	41.0
Total Learning ($)	**73.3**	**73.6**	**79.3**	**53.5**	**63.7**	**75.3**	**81.7**	**81.9**
Net Administrative Budget [b] ($)	1,237.1	1,262.5	1,241.0	1,2462.6	1,252.2	1,425.5	1,531.4	1605.4
Total Learning as % of Net Administrative Budget ($)	**5.9**	**5.8**	**6.4**	**4.3**	**5.1**	**5.3**	**5.3**	**5.1**
Salary [c] ($)	709.6	760.0	824.3	765.3	774.6	847.2	922.5	988.9
Learning Delivered as % of Salary Costs	**5.4**	**4.9**	**3.9**	**3.5**	**3.6**	**4.5**	**4.3**	**4.1**

[a] As of June 30, 2005

[b] Includes OED/SEC/Board in FY03-FY05.

[c] FY98-00 includes costs of all STT/STC and FY01-FY05 includes costs of short-term temporaries and consultants who were employed for at least 120 days a year or longer; FY04 and FY05 also include costs of extended term temporaries and consultants. These consultants typically participate in staff learning programs.

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[21] Again, it must be noted that regional learning activities may not be entered consistently into the Learning Catalog.

3.23   The development and refinement of administrative data systems have supported systematic evaluation, with course and participant data available for analytic purposes. Program evaluation serves an important function for staff learning in monitoring quality, providing formative feedback, and measuring outcomes and impact. Individual VPUs can dedicate their own resources to evaluation activities when desired, but WBIEG formally serves this role for the Board.

Monitoring quality

3.24   As discussed in chapter 2, WBIEG conducts level 1 evaluations to gain participants' feedback on course quality. The aggregate ratings for FY05 indicated that learning activities were generally of high quality. Nearly all participants from the activities sampled assigned favorable ratings for the overall quality (87 percent) and for the activities' relevance for the Bank's mission (91 percent).[22] Eighty-seven percent assigned favorable ratings for the activities' usefulness for their jobs (figure 7).

Figure 7. Percentage of favorable ratings for course quality
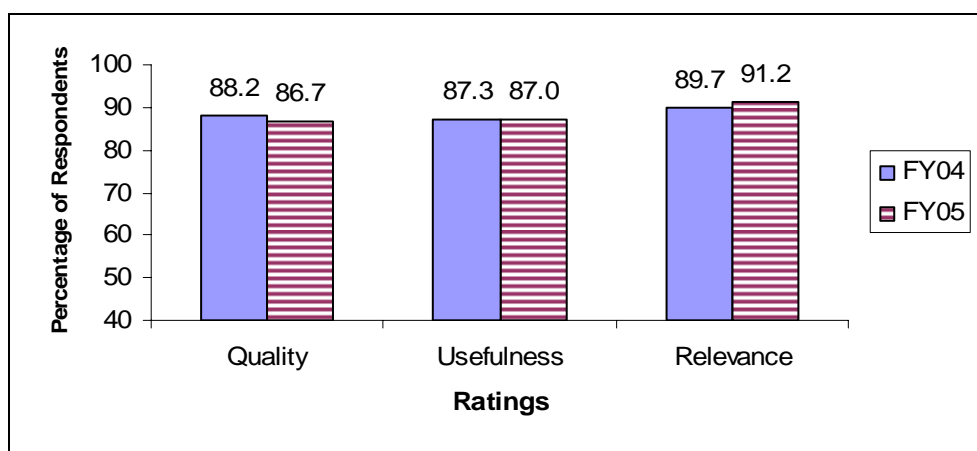
Source: World Bank 2005

3.25   WBIEG uses two standard Likert scale questions in its level 1 questionnaire for comparison with ASTD's 2004 benchmarks:

- The mean rating for "my knowledge/skills increased as a result of this training" was 4.21, similar to ASTD's benchmark of 4.20,[23] and

- The mean rating for "the knowledge/skills gained through this training are directly applicable to my job" was 4.16, below ASTD's benchmark of 4.23.

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[22] High ratings include a 4 or 5 on a 5-point scale. The benchmark for quality observed by the Bank is for 85 percent of respondents to provide high ratings. This benchmark was established prior to the SLF and is discussed in appendix B.

[23] Mean ratings are based on a 5-point Likert scale: where 1 is "strongly disagree" and 5 is "strongly agree."

A baseline at the VPU level for these items was established in FY04 and will be useful for gauging progress in the future.

Outcomes and impact

3.26   The Learning Board, SLCs, and regions now routinely use evaluation findings to plan improvements. Individual program studies to date have largely concentrated on initiatives of the SLCs, a pattern that is not surprising given that these centers were specifically designated within the new framework to assign accountability for high-priority areas. WBIEG's evaluation findings therefore provide evidence of how the new results-driven model is shaping staff learning to link outcomes with business objectives. Some key sample areas are presented below to demonstrate how the SLF is systematically functioning to address the original challenges identified in the ART process in 2001. The examples presented are key initiatives with associated evaluation results; many other important programs that have been implemented to address SLF priorities are not mentioned in this report.

Management skills

3.27   During FY98, a working group concluded that the Bank needed significant changes in leadership competencies "from highly individualistic, overly intellectual/technical attitudes with little accountability to competencies for interdependent team work, actions for results meeting client needs, a more humble, learning-oriented attitude open to gaining knowledge from others, and strengthened accountability for quality and resource management" (see World Bank 2000a).

3.28   The ART process identified the need for a managerial learning program as an immediate and ongoing priority. In response, Leadership and Organizational Effectiveness (HRSLO) and the associated Management SLC have developed a curriculum focused on the five M's: managing self, managing others, managing work, managing the organization, and managing change. Due to its high priority placed on effective leadership skills and behaviors, the Learning Board has requested evaluations of most major management learning events, and evaluation findings have informed program improvements. Some major initiatives to date and the associated evaluation results beyond level 1 are shown in table 11.

Table 11. Selected learning initiatives conducted by the Management SLC

	FY01	FY02	FY03	FY04	FY05
Coaching (introduced in 2000 for managers in transition)	Thirty-four managers and directors participated.	Two hundred fifty managers and senior team leaders participated, with over 80 percent of first-time managers included.	One hundred forty managers and about 70 senior team leaders participated.	One hundred fifty-three managers and about 85 senior team leaders participated.	One hundred fifty-two managers and 81 senior team leaders participated.
Results	WBIEG conducted an evaluation on the quality and impact of the individual coaching program, focused on the 34 participants from 2000-02 (Prom-Jackson et al. 2002a). Ninety-five percent of the 19 respondents rated the quality of coaching services above average or higher; 100 percent would recommend coaching to other managers; 75 percent indicated that they met their goals of becoming better managers; and 87 percent rated coaching as an appropriate, effective, and efficient learning method for managers. The greatest effects of coaching were identified in the areas of managing change, managing self, and managing others. The study provided recommendations, including that the Bank should continue to support the program.				

	FY01	FY02	FY03	FY04	FY05
Workshops	Learning program being revamped to focus on the five M's.	A series of workshops were designed and piloted. About 200 managers attended one or more of the 20 sessions.	Forty workshops were offered with over 375 participants (240 current managers).	About 30 1- or 2-day workshops were provided with around 300 staff participating.	A planned shift was away from open-enrollment workshops to customized workshops.
Results	WBIEG conducted an evaluation of three sessions of "Communication as Power: Listening, Inquiring, Feedback," a workshop designed for managers in a new assignment (Zia, Stone, and Palmisano 2003). Managers reported that they had changed many of their communication behaviors, including consciously using the skills they had practiced in the workshop. They also reported that these changes improved their employees' behavior. In FY04, the Learning Board reported that limited time and incentives for managers resulted in poor attendance at workshops. Some workshops were cancelled and others averaged less than 10 participants.				

	FY01	FY02	FY03	FY04	FY05
Managing a Country Office	This course was launched in 1993 and has been offered twice each year since then. It is a week-long course to train Bank staff who are about to assume responsibility for country offices, either as country managers or country directors. Each course typically has 10-15 participants.				Evaluation results have informed the redesign of course.
Results	WBIEG conducted an evaluation targeting all course participants from 2001, 2002, and 2003 (Zia and Dirr 2004). The evaluation concluded that the course is partially achieving its goal of preparing participants to assume their responsibilities as country managers/directors. Participants gave only modest ratings for the usefulness of most of the topics and provided specific suggestions for improvement.				

			FY03	FY04	FY05
New Managers' Leadership Program (NMLP) (3 5-day modules: Crafting Your Management Role, Achieving Business Results, and Leading Change)			The NMLP was launched, with about 100 managers attending.	Two new cohorts graduated from the NMLP, totaling 165 participants over two years.	Three new cohorts were sponsored, for a three-year total of 260 trained managers.
Results	WBIEG conducted an evaluation of NMLP by studying three types of data for cohorts 3 and 4: participant feedback (Level 1), feedback from participants three to four months after the program, and feedback from participants' direct reports (Zia, Hanson, and Gunnarson 2004). The study focused on 57 new managers and their 675 subordinates. Participants rated Modules 2 and 3 highly. Module 1 was not rated as well. The pre- and post- assessments of new managers by subordinates showed no significant changes. Nearly half (48 percent) of the responding managers reported that they could use the skills and knowledge to a limited or considerable extent (4 or 5 on a 5-point scale), and 86 percent recommended the course to other managers.				

3.29   The evolving vision for management learning has focused on four types of programs:

- Separate core programs for new and experienced managers;

- Role specific programs—such as peer learning, individual coaching, opportunities for discussion, on-the-job learning, and knowledge sharing;

- External programs—opportunities to attend short, cutting-edge external programs on management and leadership; and

- E-learning—Bank specific (e.g., resource and financial management) and Harvard e-learning (leadership transitions, managing virtual teams, difficult conversations, etc.)

3.30   Many of these programs are now in place—the New Managers' Leadership Program, peer learning events for country and sector managers, an individual coaching program, and the establishment of an external course facility to name a few. In addition, HRSLO has designed a spiral career development model for managers, task team leaders, and team members to provide guidance on which learning opportunities to pursue at various points in their careers. Other planned initiatives such as a program for experienced managers and a Bankwide management forum have been delayed and are now being tailored for FY06.

3.31   WBIEG's impact evaluations informed improvements in management learning. The overview of learning initiatives for managers presented in this report focuses on those of the Management SLC which WBIEG has evaluated, but many other important initiatives also exist such as those provided through Client Engagement and Team Learning (CET), OPCS, and regions.

Administrative and client support (ACS) skills

3.32   ACS staff play a critical role in supporting effective management and project implementation. When the SLF emerged, the key stakeholders understood that shifts in learning content must focus not only on managers' behaviors and skills but also on those of the support staff. A separate ART process specifically focused on ACS Learning was therefore undertaken.

3.33   The major challenge facing the ACS ART was to design a core curriculum that would equip ACS staff with the knowledge, skills, and behavior training they need. The guiding vision recognized that ACS staff need to contribute in a team environment and to support the "office of the future." The development of an effective learning program also needed to consider that roughly one half of ACS staff are based in country offices.

3.34   A new agenda for ACS learning emerged from the ART exercise, as reflected in box 2.

<div style="background-color:#cceeff; padding:1em;">

Box 2. The new agenda for ACS staff learning

➤ ACS staff would have an improved sense of ownership for their learning agenda

➤ A core curriculum would be developed, focused on four areas:
  - Understanding how the Bank operates
  - Supporting Bank business from desktop
  - Working in a team-based environment
  - Organizing and tracking work tasks

➤ A road map would be established for ACS learning to provide ACS staff with clear information to develop their individual learning plans

➤ An evaluation and feedback strategy would assess how well ART objectives are being achieved

➤ Staff and managers would receive improved communication on ACS learning

➤ ACS learning would be a priority in VPU Learning Plans

➤ VPU learning committees would include an ACS staff member

➤ Clear accountability for ACS learning would be assigned to the ACS SLC and to the ACS Network Learning Committee

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3.35   In accordance with this new agenda, the ACS SLC was established in FY03. Notable milestones in ACS learning are presented in table 12.

Table 12. ACS learning initiatives

FY02	FY03	FY04	FY05
▪ ART process on ACS learning ▪ New ACS learning proposals financed by the Learning Board including Leading and Managing in a Team-Based Environment for Country Office Staff	Designed and delivered new curriculum. Activities included: ▪ Over 45 events (over 600 participants) ▪ The first ACS Learning Week (700 participants) ▪ Closer collaboration with regions: joint programs with EAP/SAP and AFR.	▪ Fifteen different courses offered (45 face-to-face sessions) to 760 participants ▪ Core curriculum offered in two country offices, for 127 staff representing 47 country offices ▪ New e-learning modules developed (e.g., Communicating Nondefensively and Managing ACS Projects) ▪ Four-day Learning and Knowledge Forum held for more than 200 staff ▪ WebEx piloted, a real-time collaborative learning tool used as a follow-up to face-to-face courses	▪ Forty-one programs were delivered to 640 participants. ▪ The ACS Learning and Knowledge Forum attracted 1000 staff. ▪ Collaborated with ISG and OPCS to design and pilot Integrated Bank Operations and IT Systems. ▪ Finalized an e-learning module: Planning an Effective Presentation

3.36   To date, the ACS SLC and the Learning Board have worked effectively to meet ACS learning objectives. A core curriculum is delivered to ACS staff through events in country offices and through streaming video. The ACS SLC has integrated evaluation practices to support continuous improvement. ACS learning has been prioritized in VPU Learning Plans and, in addition to the ACS SLC, the regions and other VPUs have

developed active ACS learning initiatives. In addition, WBIEG evaluated eight sessions of "Building Your Skills for Working in a Team-Based Environment" (Bardini, Gunnarson, and Palmisano 2003). This study focused on identifying effects on workplace skills and behaviors of participating ACS staff. Participants rated the course as relevant and useful, and they reported a perceived impact on strengthening ACS work relations with Bank staff and clients.

New operational learning

3.37   High-quality Bank operations—particularly the compliance with safeguard and fiduciary policies—are needed for the sustainability of development outcomes. Core operational knowledge is therefore integral to the success of the Bank's business strategy and was identified as an early priority for the SLF. An ongoing priority of the Learning Board has been to establish effective operational learning programs for Bank staff. Key operational programs include *Multisectoral Team Learning, Introduction to Bank Operations, and Trust Fund Learning and Accreditation*, described below.

Multisectoral team learning (MTL)

3.38   Cross-sectoral and integrative professional skills are needed to identify and address global public good priorities and corporate advocacy priorities and to deliver cross-sectoral products and services. MTL is the only example of a cross-sectoral initiative started under the SLF that has been evaluated in phases to identify outcomes and impact.

3.39   The MTL Program was introduced in FY02 to support the Bank's strategic goals and the new approaches and lending instruments that recognize poverty as a multidimensional problem. The program integrates learning into the operational work of teams, rather than training staff in a classroom setting. The teams are responsible for work products that cross traditional sectoral boundaries—such as Country Assistance Strategies (CAS), Poverty Reduction Strategy Papers (PRSPs), and community-driven development to name a few. A small group of learning coaches, drawn from operational staff and development specialists was established in HRS. Each team was given a learning budget and worked with an experienced coach to create a team learning plan focused on acquiring the knowledge and skills necessary to complete the team's work assignment. An overview of the progression of the MTL Program is shown in table 13.

Table 13. Evolution of the MTL program

FY02	FY03	FY04	FY05
Twenty-nine teams nominated by the regions launched the MTL pilot program	The program was expanded, with support provided to over 50 operational teams (850 clients and staff involved in MTL activities)	MTL became part of the TEAMS Program, part of plan to scale up. Original MTL worked with 40 teams (600 participants).	Support was provided to 41 teams (560 participants). The team portfolio was restructured, with some coaching completed or moved into "flex" mode. Eighteen new teams in start-up phase.

3.40   In many cases, the MTL Program worked with clients and staff together. WBIEG evaluated the success of the 29 pilot teams in achieving results, finding that the MTL Program had made an important contribution to senior-level discussions on corporate learning and team effectiveness (Prom-Jackson et al. 2002b). The evaluation identified the key challenge facing the program as scaling up for a sustainable business model that could support all operational learning.

3.41   The MTL Program was reshaped in FY04 to address the need to become a sustainable business model. The previous level of support was maintained with 40 teams, and less intensive support was provided to additional teams to maximize effectiveness and efficiency. Examples of this support included:

- Training regional staff or MTL "graduates" to serve as learning coaches for other teams.

- Working with teams preparing PRSPs or CAS to foster cross-learning among the teams.

- Expanding the advisory services available through online resources, guidebooks for key activities such as PRSPs, and a new web-based "help desk" Quickcoach to provide just-in-time guidance for teams.

- Tying the MTL Program to team leader workshops.

3.42   The program's name was changed to the TEAMS Program in FY04 to reflect the broader scope. Responsibility for the program was also moved into the Process and Interaction SLC (renamed the SLC for Client Engagement and Teams), reflecting its clear link to client engagement.

3.43   After WBIEG had evaluated the pilot teams, the Learning Board requested two additional evaluations of the MTL Program (Quizon 2004; Quizon, Ouchi, and Gunnarson 2004). The first one indicated that MTL team-learning practices were successful in building and improving multisectoral teams, but the results from a survey of task team leaders did not provide evidence that the program improved the quality and timeliness of final team outputs or products. The next (Phase III) evaluation indicated that the MTL Program improved the overall quality of final Bank documents by about 10 percent. A team's use of certain program resources (e.g., team/TTL coach, Quality at Entry Assessments, etc.) was positively and highly correlated with positive team ratings for desirable characteristics, behaviors, and performance. Also, in the instances where MTL-orchestrated Bank-client engagements happened, their overall effectiveness and impact extended beyond the organized events themselves. Both the Phase II and Phase III evaluations for MTL relied on stronger methodology than used previously by WBIEG—notably the comparisons between MTL and non-MTL teams and the blind review of products from both types.

3.44   Results and comments from the evaluations have been considered in program changes over time, particularly informing the efforts to "scale up." In FY05, coaching relationships with 30 teams were completed or moved into a flexible arrangement. Five thematic coaching/knowledge teams now manage most of the team coaching work.

These themes include CAS, Poverty Reduction Support Credit, Postconflict, Middle Income Countries, and HIV/AIDS. A "virtual teams" video was completed in collaboration with the Information Support Group (ISG). In the first quarter, three regional "Foundations of Team Leadership" were delivered in ECA, AFR and EAP-SAR with 57 participants.

Introduction to Bank operations (IBO)

3.45   The Learning Board asked OPCS to develop and deliver an operational core curriculum with the first priority a focus on beginning operational skills. A new IBO course was piloted in FY02 and rolled out in subsequent years as shown in table 14.

3.46   Effective operational skills are key to achieving business results, and the Learning Board has prioritized the evaluation of IBO and the use of results to inform improvements. In FY03, WBIEG administered objective multiple-choice tests (level 2) to measure learning gains and conducted an impact evaluation (Le Rouzic 2003; Liu 2003). These studies indicated that learning gains were high, the new knowledge levels were maintained three months later, and that these gains were significantly higher than those of a matched comparison group of Bank staff who had not taken the course.

Table 14. Introduction to Bank operations (IBO)

FY02	FY03	FY04	FY05
The Learning Board approved a proposal for an operational core curriculum and the IBO course was piloted.	IBO was delivered 10 times to over 300 participants.	Fourteen sessions of IBO were offered to over 380 participants.	Four sessions of IBO were delivered to 124 participants. OPCS was offered increased assistance from LSG and funding to develop a new blended IBO—a joint effort of regions, interested networks, and OPCS.

3.47   The Learning Board continues to monitor this program's ability to address staff needs. Waiting lists for IBO are long, and the Board reported at the end of FY05 that only 34 percent of GE+ Operations staff in the Bank for six years or less had participated in an operational learning activity (World Bank 2005). A recent review of the OPCS core course found that the learning objectives were not clearly defined in terms of their link to business needs and that the pedagogical design was not easily scaled up or replicated in its current format. [24] The Learning Board is using these and other findings to inform plans for improvements: OPCS has been offered assistance from LSG and funding has been provided to develop a new blended IBO—a joint effort of regions, interested networks and OPCS.

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[24] Jeannette Murray (Human Resources Learning Board), Marsha McGraw Olive (Europe and Central Asia Vice President office), and Klaus Tilmes (Operations Evaluation Department Knowledge and Evaluation Capacity Development) conducted the review and presented it to the Learning Board on December 17, 2004.

Trust fund learning and accreditation program (TLAP)

3.48   TLAP has been an important initiative, demonstrating that high quality, interactive e-learning can be successful in the Bank's environment.

3.49   Trust funds are financial arrangements whereby bilateral and other external donors provide grants to support the Bank's activities. These grants are used for project preparation, technical assistance, advisory services, debt relief, postconflict transition, and the cofinancing of investment projects. Bank staff often manage the appropriate use of trust funds, and a comprehensive Trust Fund Process Review in FY01 identified the need to enhance staff knowledge of the management and applications of trust funds (Khattri et al. 2002).

3.50   TLAP was developed in response to the FY01 review and comprises an e-learning curriculum with 17 learning modules, a self-assessment test, and a 48-item online accreditation exam based on the learning modules. The program was piloted in October 2002 and improvements recommended by a formative evaluation were implemented before the program was launched Bankwide in December 2002. Beginning in FY04, only accredited Task Team Leaders are allowed to manage and execute trust funds.

3.51   WBIEG has evaluated TLAP, and results indicate that this is an effective program that provides significant learning gains (Khattri et al. 2003; Shi, Khattri, and Han 2004). Compliance with trust fund requirements improved after the TLAP was implemented. This program has also provided valuable experience with learning accreditation—demonstrating how a certification process can be useful where the business needs, learning objectives, and knowledge to be acquired are clearly defined.

Metanalyses: What contributes to learning?

3.52   The new learning initiatives and respective evaluation results discussed previously provide examples of how the Bank addresses key learning priorities and uses results for continuous improvement. These initiatives represent but a few of the major staff learning programs—many others have been developed or refined to provide other professional and technical skills, address regional needs, and promote innovative learning in other areas. Although WBIEG conducts a limited number of impact evaluations each year, the group does produce general studies to inform the Bank's learning community about what factors contribute to the effectiveness of learning activities.

3.53   As part of the level 1 evaluation process, WBIEG provides an annual review of staff learning, reporting on the results from participant feedback and then also conducting an analysis of participants within courses to assess whether activity features and participants' characteristics are related to quality (Chard, Arango, and Jha 2004).[25] In FY05, WBIEG reviewed the studies and impact evaluations completed under the SLF to date to provide a comprehensive look at what activity features, participant characteristics,

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[25] This analysis uses hierarchical linear modeling (HLM), a statistical modeling procedure that analyzes hierarchically nested data such as participants within courses.

work conditions and other factors contribute to effectiveness. Which features are effective depends on the objective(s) of the program (Lockheed and Arango 2005).

- For <u>raising awareness</u>, effective features include (a) networking opportunities (sector forums); (b) cutting-edge information (P&T brown bag seminars); and (c) high-priority corporate information (such as wallet cards with the Millennium Development Goals).

- For <u>building staff capabilities</u>, influential factors are (a) content (including relevant case studies and concrete examples); (b) pedagogy; (c) instructor quality; and, (d) sufficient time.

- For <u>building team effectiveness and developing leaders,</u> behavioral changes can occur through action learning (including coaching).

- For <u>achieving operational impact</u>, good learning programs must be combined with institutional support. Key factors include the right participants, follow-up, and supervisory support.

3.54   This study also reported on the pattern of findings compiled by impact evaluations on staff learning initiatives to date. Over half the learning programs for which impact evaluations have been conducted focused on whether participants used what they learned in the program. In all cases, a substantial share of participants reported on-the-job use, and in a few cases the use of learning by participants could be compared with the use of similar types of knowledge by nonparticipants. In addition, evaluations of three programs have confirmed operational impact in terms of compliance, product quality, and quality assurance ratings.

3.55   The information about what contributes to effective learning is a valuable resource for learning coordinators and course providers, but another important function of the study on the features of staff learning that contribute to effectiveness was to examine the distribution of impact evaluations under the SLF to date and note the types of activities that have not been evaluated thus far. For the new framework to ground learning in results, the Learning Board will need to increase the support for evaluation to gather more evidence about what works across learning objectives and activity types.

SHIFTS IN THE LEARNING CULTURE

3.56   Another major objective of the SLF is to transform the Bank's culture, to improve the systemic conditions in which learning takes place. An independent assessment on the status of learning in the Bank by the Society for Organizational Learning in FY00 underscored the need to build trust and promote accountability to foster a positive environment for staff learning (Humphries, Hanig, and Senge 2000). Responses to the Bank's periodic surveys of staff and interviews with staff conducted for this review provide some evidence of how the learning culture has changed since the SLF was established.

Findings from the staff survey

3.57   The Learning Board and CLO use data from the staff survey to assess improvements in or challenges to the Bank's learning culture over time. One positive indicator regarding the culture for staff is the increased response rate to the survey: in 2003, 83 percent (9,560 staff) responded, compared to 76 percent in 2002, 55 percent in 1999, and 50 percent in 1997.[26] No tangible incentives are offered to staff to complete the survey, and the increased response rate reflects the recognition that senior management takes the results seriously as being the pulse of organizational health. Results from questions related to learning are found in table 15 below.

Table 15. Results from the staff survey on questions of learning, 1997-2003

World Bank Group Staff Survey Questions	1997 (50% Response Rate)		1999 (55% Response Rate)		2002 (76% Response Rate)		2003 (83% Response Rate)	
	% Favorable	Valid N	% Favorable	Valid N	% Favorable	Valid N	% Favorable	Valid N
1. My opportunities for training have increased.	41	4,750	49	5,888				
2. My manager has given me the time to take advantage of training opportunities.	46	4,719	60	5,910				
3. My manager supports my learning and development plans.					75	7,277		
4. I have adequate opportunities to learn new skills to do my job better.					66	7,366	65	9,337
5. The World Bank Group provides continuous learning opportunities to its staff.							80	9,368
6. I take advantage of the learning opportunities available to me							63	9,284

3.58   Although cross-year comparisons are not possible on new questions, the analysis still yields interesting differences across groups in the same year. The Learning Board has analyzed these results as part of a larger strategy of continuous improvement. The CLO's office examined responses by grade level, gender, location, length of service, and other potential independent variables to see what factors influence responses. The Learning Board has used these results to identify staff learning needs or trends.

3.59   The Board also reviewed the common themes that emerged in response to the open-ended item asking staff to identify one thing that would help them to achieve their learning and development goals. Dominant themes were identified by region, and this information was used in some cases to pursue regional solutions. For example, staff

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[26] The survey was first administered as a web survey in 2002.

survey results indicated that ECA staff were divided on learning issues, with country-based staff giving more favorable ratings regarding learning opportunities than headquarters staff. There were also notable variations among country units. In addition, the most frequent write-in among ECA staff was that they needed time and budget to improve learning and professional development. This feedback influenced ECA's Learning Committee to institute a competition for professional development grants for senior specialists in FY05 (World Bank 2004b).

3.60   Asia Learning (East Asia and Pacific and South Asia regions) provided another example of how survey results inform plans for improvement. This unit noted that "learning is impeded by the current culture where all the incentives lie on the side of operational work rather than learning" with EAP-SAR responses stating that the volume of the workload was the single largest factor preventing staff from taking advantage of the training offered (28 percent of EAP responses and 29 percent of SAR responses) (World Bank 2004c). Asia Learning has used staff survey and other data to design a two-year action plan focused on learning culture and behavior.

How staff learn

3.61   Twenty-eight Bank staff, nine based in Washington, DC and the remainder in the field, were interviewed to provide an understanding of the experiences and perspectives of staff. These individuals were not representative of the Bank's overall staff. Learning Board members or sector managers recommended them for this study, usually because they had been active in formal training.

3.62   Respondents were asked to reflect on how they developed the knowledge and skills needed during their current career. Six reported that mentoring, whether formal or informal, plays an important role. A majority referred in general to hands-on opportunities, indicating that they learn best by doing—either in a formal action-based learning event or at their own jobs. Two noted that a help-desk model works well, where there is a clearly identified person to call with specific questions as needed.

3.63   A few staff had reflected extensively on how they developed the knowledge and skills they needed, and they presented theories about Bank culture or suggestions for improvement. One woman observed that staff in networks are academic and learn by reading and writing whereas staff in regions are practitioners and learn by talking and doing. A sector manager suggested that systemic changes are needed to encourage senior specialists to participate in mentoring and knowledge-sharing activities. Illustrative comments on how staff learn are in box 3.

Box 3. Sample quotes from staff about how they learn

"I have thought about network reform for learning. There needs to be more resourcing of sector gurus. These are senior operational people who are 100 percent booked on getting their own projects to the board. They need some time allotted for sharing knowledge, giving brown bags for example."
SAR sector manager

"Rotation or cross-support opportunities are the best—for example, if I could move from energy to education. The big problem is to upgrade technical skills, and there needs to be a mechanism to get exposure across areas. Since these opportunities are based on your contacts, those in country offices are greatly disadvantaged."
INF financial analyst

"I need access to experts. These need to be personal contacts so I am comfortable if I need to ask silly questions. This is a problem especially for country officers because we are very isolated and do not have that kind of proximity to our colleagues in Washington."
LCR country officer

"We learn best with clients. The Bank should draw on local resources. Perhaps have 80 percent of us and 20 percent of the client [together in learning events], especially government agencies. This is a great way for us to understand them and for them to understand us."
EAP PSD senior specialist

"I learn best if I already need to know something. Then I can take the skills and immediately apply them. Really, informal situations are better where a colleague can help me."
OPCS ACS staff member

3.64   Overall, few of those interviewed reported that they tended to learn the skills and knowledge they needed through formal learning events. IT specialists were an exception, however, in that they emphasized the value of attending formal training to maintain up-to-date skills.

Incentives for participating in formal learning opportunities

3.65   Staff were also asked to identify what factors motivated them to participate in formal learning opportunities, and sample responses are in box 4. By far, the most common reason cited was that a colleague had taken a course and subsequently recommended it. Staff in the field also expressed a strong motivation to learn more about Bank operations—although in some cases they had been unable to enroll in desired courses because they were full.

Box 4. Sample comments on incentives for staff to participate in learning opportunities

"I was suddenly speaking for the Bank, so I needed to know about the Bank. This was a big incentive."
LCR senior public sector specialist

"The Bank is changing the way we operate. That really requires huge skills changes. I am very motivated, but it needs to be compulsory for all to go through these trainings." *EAP senior poverty economist*

"The Bank has done a lot in matching supply and demand. I go to increase my capacity and also to interact with my colleagues at the Bank." *LCR country officer*

"Really, I go for professional growth, but it is so easy in the short run to say I don't have time."
EAP operations officer

3.66   Several of those in the field were motivated to attend sector weeks because they provided a rare opportunity to network with others in their region or area of technical expertise. Field staff saw these as important opportunities and noted that the learning events had become more sophisticated over time. However, in cases where sector weeks had been condensed—to two-day events for example—staff observed that they were no longer worth the travel time.

3.67   Staff tended to describe a positive learning culture where they often felt encouraged to seek learning opportunities or viewed it as their responsibility. Those who had worked in the Bank for many years reflected that there were many more appropriate learning opportunities now than there had been a few years ago.

Barriers to formal learning opportunities

3.68   Respondents noted that the most common factor discouraging them from participating in learning events was that they could not identify an appropriate event to attend. In some cases, the Learning Catalog confused or overwhelmed staff. Those in headquarters also reported being overwhelmed by e-mails announcing training, whereas those in the field relied heavily on e-mail to learn about what opportunities were available. Some individuals suggested the need for a designated learning advisor or some other interactive system where one could find appropriate events.[27] Illustrative quotes on barriers for learning are in box 5.

Box 5. Sample comments on the barriers to participating in learning opportunities

"It is frustrating to find training. For example, I want an overview of procurement, but I don't want to do procurement. If I type that in as my key word, it is impossible to sort through and figure out what I want. Some sort of learning advisor would be helpful."
DEC senior economist

"My region sends emails on training so that is helpful. The Learning Catalog is far from being user-friendly and not complete, so the barrier is that it is difficult to figure out."
ECA operations analyst

"I have a very heavy schedule and I can't justify traveling all the way to Washington for two days. There are few opportunities available."
AFR highway engineer

"There is no budget available. This is maddening. Each year we have to make a learning plan, but the managers don't take it seriously."
LCR ACS staff member

3.69   Some of those in headquarters also indicated that it was unrealistic to hold all-day training sessions and expect people to stay throughout. One individual observed that he could not ignore calls from clients while learning how to behave better towards them. In contrast, those in the field asserted that they could not travel to Washington for a short

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[27] Current initiatives of the Knowledge and Learning Environment (KLE)—including the new Learning Management System in general and learning roadmaps in particular—are expected to address these problems.

training, and many noted that the only appropriate opportunities available for them were still at headquarters.

<div align="center">SUMMARY OF PROGRESS TOWARDS THE SLF OBJECTIVES</div>

3.70   This chapter provides some indication of how well the SLF is achieving its objectives. More important, the chapter provides concrete evidence and many examples of how a systemic change has occurred, with a centralized feedback loop to support and monitor decentralized learning activities and ground learning in results over time. Recommendations to improve progress are provided in chapter 5.

3.71   *Learning Objectives: From "Build Technical Excellence" to "Build Capacity to Create Results."* This overarching concept—building staff capacity—encompasses all of the other SLF objectives.   Evaluation findings show that participants in learning activities use what they learned in their jobs. However, several types of activities have not yet been evaluated and many of the studies completed have relied on self-reported data on learning impact. Additional evidence on progress towards this objective is likely to accrue as evaluation practices continue to evolve and lessons learned from studies guide program design and improvement.

3.72   *Content Focus: From "Professional Sectoral Skills" to "More Behavior, Integrative, Operational and Managerial Skills."* The CLO and Learning Board have prioritized the development of programs to address needs identified in the original ART exercise, launching and redesigning many programs since the start of the SLF. In some cases, evaluations have shown these initiatives to have learning or operational impact. The feedback loop of the new framework regularly monitors new activities and highlights challenges when needed. Current examples include the undersupply of appropriate learning opportunities to develop core operational skills and the continuing need for an effective, cohesive strategy for developing managers. The Learning Board discusses such challenges and plans strategies to increase effectiveness, facilitating further progress toward this objective.

3.73   *Learner Focus: From "Individual HQ Staff" to "More Teams, Country Office Staff, and Joint Client/Staff Teams."* Progress in shifting away from individual headquarters staff is still in the beginning stages: administrative data do not yet show significant increases in team-based learning, participation of country office staff, or joint client/staff activities. However, the CLO and Learning Board have encouraged and facilitated progress towards this objective. Examples include setting a target (20 percent) for activities that must be accessible to country office staff, establishing a new administrative data system to improve the tracking of team-based and country office activities, offering joint staff-client activities such as the *Innovativeness and Competitiveness Workshop Series* and *Regional Seminar on Bank Insolvency for EAP,* and spotlighting best practices such as the MTL Program and regional initiatives among others.

3.74   *Pedagogy: From "Classroom Learning" to "New Forms of Pedagogy (e.g., peer learning, action learning, e-learning)."* Administrative data systems also do not yet

show significant increases in the use of new forms of pedagogy as an overall percentage of learning activities. New innovative programs—both formal and informal—might be underreported due to data issues. Measurable progress in this area is likely to occur with the launch of the KLE (and more accurate tracking of e-learning in particular), increased support from LSG, and formative guidance from successful programs such as TLAP.

3.75   *Structure: From "Little Accountability, Learning Silos" to Ownership/Accountability Demand driven, Cross-Boundary."* The SLF has established SLCs to clarify accountability for high-priority content areas and moved resources to the regions to respond to staff learning needs. The process for developing learning plans requires learning coordinators and VPUs to strategize for effective resource use (rather than the previous "just use or lose" approach), and the Learning Board brings VPUs together for dialogue as a corporate learning community. These pieces of the framework provide the foundation for breaking down the supply silos of the previous system. Data from FY03-05 on learning activities do not show an increase in overall joint VPU offerings, but there has been a steady shift towards increased Bank region collaboration on joint client-staff activities. In addition, WBIEG is examining cross-sectoral learning at the Bank, identifying best practices, and recommending improvements to better align offerings with business needs (Shi, Cao, and Yang 2005).

3.76   *Culture: From "Side Line, I Don't Have Time!" to "Business Line, Learning Matters!"* Results from the staff survey and interviews with staff and sector managers indicate that learning is valued within the Bank's culture and is perceived as important for achieving business objectives. In addition, the learning plan and quarterly review process sends a clear signal to VPUs that learning activities should be strategically linked to work plans.

4.   BENCHMARKING

4.1   Staff decentralization, diversification of learning technologies, and changing corporate priorities all present challenges for efforts to "benchmark" staff learning. This chapter compares the Bank's SLF with staff learning in other organizations, focusing on both standard benchmarks and new indicators. With respect to both, the Bank's SLF is at the leading edge of the industry.

4.2   The World Bank is ahead of the benchmark for staff learning in terms of organization, leadership, and evaluation. The Bank is comparable to benchmark organizations for alignment of staff learning with business needs, learning targets, process for budget allocations to staff learning, average expenditures, and implementation of a LMS.   The Bank appears to be below the benchmark for the use of technology in learning.

4.3   The principal organization that benchmarks staff learning, ASTD, provides a number of key indicators in its annual state of the industry report; most of these indicators focus on traditional practices while others adjust on an annual basis in response to changes in the industry. ASTD's "benchmarking service" regularly collects data from a volunteer sample of about 350 U.S. organizations (the BMS benchmarking group), from about 25 large Fortune 500 companies and public sector organizations (the BMF benchmarking group) and from about 25 organizations that were "honored for their exceptional efforts to foster, support and leverage enterprise-side learning for business results" (the BEST benchmarking group) (Sugrue and Kim 2004). ASTD selects the BEST organizations according to evidence: (a) that learning has value in the culture; (b) of a link between learning and performance; (c) that the organization has leveraged technology in learning; and, (d) of innovative learning initiatives. ASTD does not provide information regarding the nature of this evidence, but does summarize eight characteristics of BEST learning organizations (see Appendix D).

4.4   To supplement data from ASTD, this review included formal interviews with six large and decentralized organizations (the B-6 group), as well as within the World Bank, to explore topics not covered by standard benchmarks. These findings were supplemented with (a) a study of how 72 organizations across 11 countries evaluate their learning programs and (b) other recent relevant literature (KnowledgeAdvisors 2004). This chapter is not a comprehensive benchmarking study that addresses all the issues that affect staff learning; rather it is tailored to the specific interests of the Learning Board.

ORGANIZATION AND LEADERSHIP

4.5   Large international organizations typically develop learning programs that support staff in bureaucratically and geographically decentralized locations and that are

aligned with overall corporate goals and priorities. The World Bank has responded to this challenge by establishing the SLF.

4.6   Most of the BEST benchmarking organizations have the functional equivalent of the CLO, although only two of the B-6 organizations report having such a position (the UNDP and the Bank of America) (table 16). Several of the B-6 organizations have, in addition, the functional equivalent of the Bank's Knowledge and Learning Board, whose members typically represent various "lines of business," functional units or sectors. These boards typically serve an oversight and coordination function. Some adjudicate learning priorities across units, but none have responsibility for allocating budgets for learning programs, which is delegated to the CLOs.

Table 16. Learning organization and process indicators, 2005, for World Bank and Six (B-6) comparator organizations

Organization	Leadership	Investment and Budget Processes	Learning Targets	Learning Management
IMF	Training team located within HR	$4 million Annual budget to IMF HR	Output metrics	Planned for FY06
IDB	Office of Learning in HR	1 percent of administrative budget, 1/3 to HR and 2/3 to departments	Use as much e-learning as possible	Training scorecard for management only
UNDP	CLO	--	Budget for staff development should be 3 to 5 percent of payroll (net salaries)	Installing centralized LMS to replace 17 current systems
Bank of America	CLO and Learning Council from "each line of business"	Decision by each line of business	95 percent satisfaction rate	Using off-the-shelf LMS
U.S. Defense Agency	Senior Executive Working Group and Enabling Department	Corporate University receives fixed yearly budget that is allocated to lines of business; enabling department has fixed budget	4.5-5.0 on level 1 evaluations	Implementing off-the-shelf LMS
Price Waterhouse Coopers	Matrixed group	Chief financial officer establishes budget to be allocated by volume	120 hours of training per staff annually	Moving toward LMS
World Bank	CLO aligned to HR and WBI, Learning Board from 6 regions and 11 SLCs	SFRRM and senior management establish budget and CLO/Learning Board allocate budget to VPUs	Level 1 benchmarks	LMS initiated in August 2005

Source: Benchmarking consultant interviews 2005

BUSINESS ALIGNMENT

4.7   Most organizations, including the World Bank, are still determining the structures and procedures that enable learning to be aligned with business needs. Most have rationales for expenditures on learning that emphasize the contribution of learning to core

business goals, and success as a learning organization is often expressed as learning aligned with business needs.

4.8   The ASTD BEST organizations, in recognizing the importance of aligning learning and business, have developed formal processes to align short- and long-term business strategies with competency, learning, and performance needs and priorities. In addition, they have mapped learning resources to competencies, individual development plans, jobs, and corporate goals.

4.9   The B-6 organizations note the importance of aligning learning with business. The multilateral donor institutions seem to emphasize individual skills and competencies, while the private sector organizations stress corporate objectives. [28]

INVESTMENT AND BUDGET PROCESSES

4.10   Decisionmaking methods vary for how learning organizations invest in learning. Some organizations follow historical precedents, basing proposed investments on past budgets or past attendance at learning events while others respond to proposed investments based on current needs and skills assessments. Other organizations appear to have arbitrary methods. Consequently, considerable variation in the efficiency of these investments can occur, and average expenditures may not provide suitable benchmarks.

4.11   Nevertheless, total spending per employee and share of learning in the corporate budget are two indicators that are widely available, even though they do not necessarily represent best practice. Table 17 presents comparative expenditures for the most recent years; data were available for only two of the B-6, and are not reported.

Table 17. Average expenditures from ASTD benchmarking, global and BEST organizations, and World Bank, most recent year

Expenditure	BMS 2003 (n = 344)	BMF 2003 (n = 26)	BEST 2004 (n = 24)	World Bank 2005
Per employee ($)	817	1,298	2,126	n.a.
Percent of payroll	2.34	2.05	4.16	4.1 (learning delivered as % of salary)
Expenditure for external services (%)	26	38	27	n.a.
Hours of formal learning per employee per year	26	35	n.a.	n.a.
Cost per learning hour provided ($)	595	1,430	n.a.	n.a.
Cost per learning hour received ($)	56	56	n.a.	n.a

Source: Sugrue and Kim 2004.
Note: n.a. – not available

4.12   In terms of the share of the payroll, the BEST organizations spent, on average, approximately twice as much as either BMS or BMF organizations. In terms of per-employee expenditure, however, BEST organizations spent two and one-half times the

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[28] For example, IDB wants to allow staff to grow professionally, to better respond to country demands and better influence country outcomes, while PriceWaterhouseCoopers wants learning units to be seen as strategic partners and "financial players," with learning aligned to drive human capital and culture.

BMS average and nearly twice the BMF average. Some spent less on training than the norm, but the BEST organizations maximized the efficiency of the learning organization by centralization, internal process improvement, use of technology, and strategic outsourcing. Only two of the B-6 organizations provided information on their annual learning budget, so comparisons cannot be made with this group.

4.13   Processes in budget allocation varied across the B-6 organizations, ranging from the comparatively simple to the comparatively complex. For multilateral donor agencies, for example, simplicity is reported for the IMF, where the HR department proposes an annual budget with a business case justification and the IMF Office of Budget and Planning allocates the funds. By comparison, the UNDP reported that many people are involved in decisions and that there are many conditions for budget decisions. Private-sector organizations are both centralized, for example with the office of the chief financial officer of PriceWaterhouseCoopers managing the overall budget, and decentralized, for example with each line of business making its own decisions at the Bank of America. The World Bank's process for allocating resources for learning has evolved over the past several years and is described in chapter 2.

LEARNING TARGETS

4.14   Targets for learning cover budgets, delivery, effectiveness, efficiency, and impact. ASTD does not report targets for its benchmarking groups, and two of the B-6 organizations noted that they do not set targets. Other B-6 interviews showed a range of noncomparable targets. For example, two organizations mentioned learning expenditure targets, four organizations mentioned satisfaction targets, two organizations mentioned types of delivery targets (e-learning versus traditional classroom; lectures versus seminars) and two organizations mentioned hours of learning targets. None of the B-6 mentioned setting targets in all areas.

4.15   The World Bank reports six KPIs for learning but has not set specific targets for them.[29] The CLO's office monitors these indicators. In addition, existing databases and the LMS should allow monitoring of the types of alternative delivery strategies (e.g., e-learning, blended learning, team-based learning) and their comparative effectiveness.

TECHNOLOGY AND REPORTING

4.16   Learning organizations use technology in three important ways (a) to deliver learning, (b) to monitor this delivery, and (c) to integrate both through learning management systems (LMS). The ASTD benchmarking organizations provide important information on the first, while the B-6 organizations are informative on the second and on the LMS.

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[29] These indicators are: (a) share of staff participating in at least one learning activity over the past 12 months; (b) share of regional staff participating in at least two learning activities over the past 12 months; (c) expenditures on staff learning; (d) expenditures on the delivery of staff learning as a share of staff salaries and benefits; (e) learning expenditures as a share of administrative budget; and (f) share of courses with average rating of 4 or better on level 1 evaluations.

Types of learning opportunities

4.17   Most organizations use multiple approaches to design and deliver learning activities. ASTD now tracks seven types of delivery methods, which we summarized into three main categories for purposes of comparison with the World Bank. Table 18 shows a comparison of delivery methods.

Table 18. Different delivery methods provided by benchmarking organizations (by learning hours) and the World Bank (by activities), most recent year available

Delivery method	Average Percentage of Learning Hours				Average Percentage of Activities[a]
	BMS 2003 (n = 344)	BMF 2003 (n = 26)	BEST 2004 (n = 24)		World Bank 2005 (n = 2861 activities)
Exclusively classroom	68	61	42		91
Exclusively technology	18	28	29		5
Blended	6	7	24		1
Other (print only and other)	9	4	5		3

Source: Sugrue and Kim 2004.

[a] World Bank activities were categorized in the following manner: Exclusively Classroom - brown bag lunch, clinic, conference, course, sector week, seminar, and workshop; Exclusively Technology – online; Blended – videoconference; and, Other - coaching/mentoring, meeting, retreat, study tour, and team-based learning.

4.18   The share of technology-based learning in all learning is growing among benchmark organizations, but the progress is not as rapid at the Bank. The BMS organizations show an increase from 8 percent of learning hours provided by technology in 1999 to 24 percent in 2003 (Sugrue and Kim 2004). In 2004, the BEST organizations reported 29 percent of learning *hours* provided through technology. In comparison, the World Bank offers 5 percent of its formal learning *activities* through technology. Of those technology-based learning activities in the Bank, most are for IT topics, with ISG offering 71 percent (96 of 137) of e-learning activities in FY05.

4.19   Desk-top computing linked with the internet means that, as one CEO explained, "The chief knowledge officer right now in many companies is Google" (Bingham and Galagan 2005). The internet is leveraged as the "knowledge system" more and more. The World Bank's knowledge site is available both internally and externally.

4.20   The sharpest distinction between the BEST organizations and the other ASTD benchmarking organizations is in their use of "blended" learning, which combines live instructor-led learning with on-line and remote learning. For example, at IBM, staff take courses that "seamlessly" involve web-based and face-to-face elements (Davenport 2005). While accounting for only 1 percent of learning activities for staff in FY05, the World Bank's experience with blended learning for clients is extensive and uses primarily distance learning through videoconference centers located in most country offices and through the Bank-sponsored Global Development Learning Network (GDLN). Opportunities exist for the Bank's staff learning programs to exploit the Bank's videoconference networks.

Learning management systems and training scorecards

4.21   LMSs incorporate a range of functions into a single unified database, and several off-the-shelf LMSs are available.[30] Most B-6 organizations recognized the need to have a system that both provides a "portal" for staff learning and monitors learning delivery, participation and costs. Such systems are only in the early stages of introduction, and successes are coming from off-the-shelf systems.[31] These need modifications to meet specific organizational needs. To promote "one-stop shopping" for learning for staff, the World Bank purchased an off-the-shelf system, which was customized and implemented in August 2005, replacing the "home-grown" learning catalog system.

4.22   Training scorecards, which link learning to performance and performance to business, are used partially in several of the B-6 organizations. While the World Bank does not use a training scorecard, the Bank's KPIs are similar to what other organizations considered as part of a training scorecard. For example, several organizations track participation and other quantitative indicators, and others have "incomplete" scorecards (for management programs only, for example). Only the U.S. defense agency reported having a balanced scorecard.[32]

EVALUATION STRATEGY

4.23   Evaluation of staff learning has been dominated by the "Kirkpatrick 4-level" evaluation, recently extended to a 5-level system to incorporate measures of "returns on investment" (Kirkpatrick 1998 and Phillips 2003). ASTD regularly reports on both the share of organizations undertaking evaluations at the four levels, as well as the average ratings of learning across benchmarking organizations. B-6 organizations also provided information on their use of the 5-levels evaluation approach (table 19).

Table 19. Use of Kirkpatrick/Phillips 5-levels of evaluation in ASTD BMS organizations, multilateral development agencies, and the World Bank

Level	ASTD BMS (n = 213)	IMF	IDB	UNDP	World Bank
1	74%	Yes	Yes	Yes	Yes
2	31%	Yes	No	Yes	Yes
3	14%	No	No	Piloting	Yes
4	8%	No	No	No	Yes
5	n.a.	No	No	No	No

Source: Sugrue and Kim 2004, benchmarking consultant interviews
Note: n.a. = not available

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[30] In one B-6 organization, a new LMS replaced at least 17 nonintegrated systems.

[31] For example, the Bank of America's off-the-shelf LMS includes 191,000 employees, with the only difficulty reported being "learning how to utilize all its functionality." Cingular Wireless provides another example of the successful implementation of an off-the-shelf LMS, which consolidated multiple existing training systems. Only 29 enhancements were made to the off-the-shelf system, and 34,000 users were live on the system on the first day, with full implementation within 100 days.

[32] The balanced scorecard is a management and measurement system that consists of four categories – financial performance, customer knowledge, internal business processes, and learning and growth. It is meant to help organizations guide current performance and target future performance measures.

4.24   The World Bank's evaluation practice is in line with the BMS organizations and ahead of the three multilateral development agencies in the B-6 group. Three-quarters of the BMS organizations collect data on participants' responses to training (level 1), while only a third assess learning gains (level 2), 14 percent examine transfer of learning to job (level 3), and 8 percent attempt to link learning to corporate outcomes (level 4). Data were not available regarding level 5 evaluations. By comparison, WBIEG conducts all four levels of evaluation, as described in chapter 2.

4.25   The B-6 organizations described their overall strategy for evaluating training, how they determined which activities should be evaluated, where the evaluation function is housed in the organization, and what their provisions are for independent evaluation. All B-6 organizations use level 1 evaluations, and most apply these to all learning offerings with a standardized form. None of the multilateral donor organizations reported using level 2 tests to measure learning, but the private sector organizations reported using tests for half or more of their courses. Only one of the multilateral donor organizations evaluates changes in participants' behavior, and this is done only on a pilot basis. Level 3 evaluations are used in a higher share of the private-sector organizations. Aside from the World Bank, none of the multilateral donor organizations use either level 4 or level 5 evaluations, while all three of the private-sector organizations do for about 25 percent of courses. Level 5 evaluations are rare, with no use of this method among the multilateral donor agencies and only limited use in private-sector organizations.

4.26   The quasi-independence of the World Bank's learning evaluation function is unique. Most organizations include evaluation in the design effort or locate it within the line of business. Among the B-6 organizations, only the U.S. defense agency has a stand-alone group, which has six full-time professionals dedicated to evaluation. However, this unit does not carry out independent evaluations but instead provides templates, standards and processes to the curriculum managers to conduct their own self-evaluations.

4.27   A recent study surveyed 72 organizations from 11 countries in 17 industries to identify practices in evaluating learning programs (KnowledgeAdvisors 2004). This study did not look at evaluation practices from a technical perspective in terms of evaluation design, reliability, and validity of instruments, or complexity of analysis. It focused instead on other dimensions, and the World Bank compares favorably to the organizations summarized in this study with respect to evaluation processes, organization and budget, and communication of results (table 20).

Table 20. Common practice in evaluating learning programs, 2004

Evaluation Practice	72 organizations	World Bank
Process		
Key performance indicators	34% use	Yes
Level 5 evaluations	18% use	No
Level 4 evaluations	12% use	Yes, with counterfactuals
Level 3 evaluations	22% use	Yes, with counterfactuals
External benchmarking	30% compare results with other organizations	Yes, compare with ASTD norms
Internal benchmarking	35% compare results among various learning groups	Yes, compare SLCs and VPUs

(Table 20 continues on next page.)

(Table 20 continued.)

Organization and budget		
Evaluation as share of learning budget	75% report allocating 5% or less	Less than 2%
Staffing for learning analytics	85% report fewer than 2 FTEs	3 FTEs for staff learning
Communication		
Paper or electronic reports	66% use	Yes
Web reporting interfaces	24% use	Yes
Meetings/conversations	66% use	Yes
Frequency of reporting	23% report monthly; 20% report quarterly; 15% report daily	Quarterly

Source: Knowledge Advisors 2004 and WBIEG interviews.
Note: FTE = full time equivalent

4.28   Return on investment (level 5) has received considerable attention in the staff learning literature, with increasing use reported for measuring returns to staff learning (Phillips 1994 though 2005, Phillips 2002). Valid inferences regarding returns to education investments require valid data on costs of learning. For the World Bank, such detailed cost information at the "course" level has not been available, but WBIEG is conducting a study on this topic. Benefit-cost analysis also requires monetized information regarding outcomes. Where outcomes are not regularly monetized, inferences must be made.

<div align="center">

EMERGING AREAS

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4.29   Five new areas are emerging in the management of staff learning, but benchmarking data are not yet available. The World Bank is exploring all of these new areas.

4.30   Self-service Learning. Self-service learning automates learning business processes and puts the staff in charge of their individual development (Van Dam 2005). Staff members take online assessments that result in reports on training needs, which automatically identify specific learning opportunities that meet staff members' requirements. Learning programs are organized in easily accessible online curricula, which might be mapped to a competence model. Staff members autonomously (or in consultation with their manager) develop and maintain their learning plans online. Some organizations create "learning portals" designed to offer users with a single consistent interface – tailored by job role – to provide content, applications, business processes and people, anytime. Because portals can be available throughout the organization, providing on-demand learning is a strategic way to maintain consistency across the business, a key reason why the Bank is making an investment in the LMS (Vona and Granelli 2005).

4.31   Performance Support Tools. This term covers a range of tools typically available electronically and often embedded in other tools. Performance support systems provide access to specific information needed to perform a task, are used while engaged in doing the task, and can be accessed whenever the need arises (Bersin and O'Leonard 2005). The objective is often to provide a standard type of support to geographically dispersed staff. Recent evaluations indicate that certain types of performance support tools are cost-

effective, particularly in reducing calls to help desks and reducing the duration of training programs.[33] At the World Bank, TLAP employs a performance support system, as does the "Money Matters" course that LSG and HRSLO deliver together.

4.32   Outsourcing. This term applies to: (a) the traditional use of vendor services, (b) the outsourcing of training technology (LMS, e-learning content development, content integration, and the hosting of complex LMS and learning content management system software); and (c) the outsourcing of business processes, which includes help desks, vendor management, classroom administration and the training personnel themselves. Forty to 60 percent of learning organizations use traditional vendor services. Research suggests that this number will hold steady in the future. The area of huge growth is the outsourcing of training technology. Forty-seven percent of companies surveyed in a study conducted by a research advisory firm use hosted LMS services, and 70 percent used hosted services for other learning technologies, such as virtual classrooms, content management or collaboration (Bersin 2005). Far fewer companies do full business process outsourcing. The World Bank uses the first two types extensively and has outsourced certain learning opportunities in the third category.

4.33   Impact Evaluation. In evaluation, metrics tied to the efficiency of learning delivery and the effectiveness and impact of learning on performance are gaining emphasis compared to metrics related to participant satisfaction. This change requires new and better evaluation methodologies, including formal impact evaluations such as those currently conducted in the World Bank for high-priority learning programs. Improved data on staff learning costs will also permit more rigorous analyses of the rates of return to learning.

4.34   Training scorecards are being used to link learning to performance and performance to business, by providing data that stakeholders at all levels can understand. At present, the World Bank's performance management systems track only some of six dimensions tracked by the ASTD BEST group (table 21).

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[33] For example, a large U.S. computer manufacturer deployed a "mentor performance support system" and found that help desk calls were 35 percent below what they had predicted. DuPont estimates its performance support system eliminated 500 help desk calls per week for a savings of at least $750,000 a year. Aetna Insurance was able to cut its 13-week instructor-led training course for newly hired employees by two weeks through the use of a performance support tool.

Table 21. Average percentage of employees covered by different performance management methods

	Annual Performance Reviews	Individual Development Plans	Peer 360-Degree Evaluations	Skill Certification	Documented Individual Competencies	Tracking Assessment/ Training History
ASTD – BEST	95	89	40	44	83	96
	100	100	Yes	Yes	100	100
World Bank	Mandatory	All staff may complete an IDP but only 18.4% did so in FY03, and 19.5% in FY04	Mandatory for managers; optional for others.	Required only for trust fund management (2,864 staff accredited since 2002) and procurement accreditation	All employees have the opportunity to self-report individual competencies in their human resources records.	

CONCLUSIONS

4.35   The Bank's SLF is generally comparable to staff learning in the benchmarking organizations discussed in this chapter. In two areas, the World Bank appears to be on the leading edge. In five areas the Bank is comparable to the other organizations and in one area the Bank needs to improve. See figure 8.

Figure 8. Summary findings of the World Bank on aspects of staff learning compared to benchmarked organizations
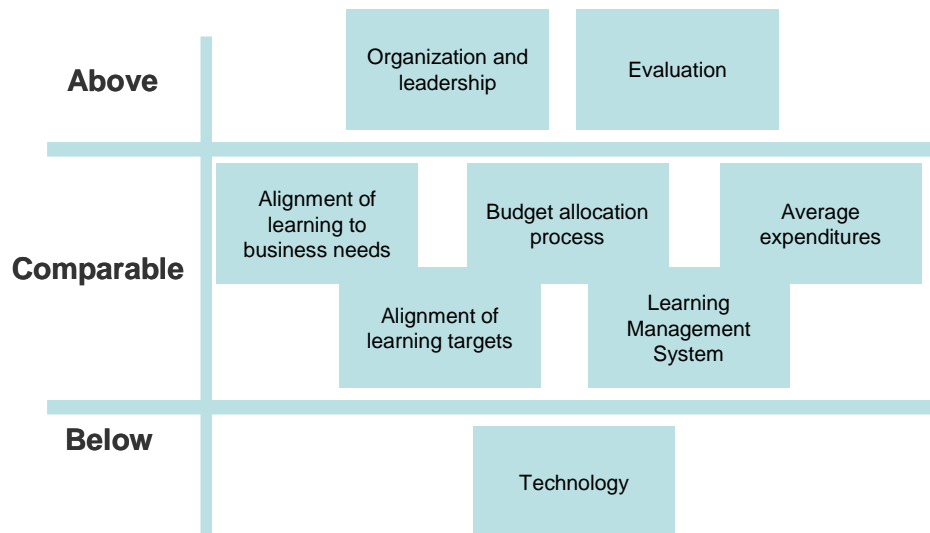
4.36   The World Bank is <u>ahead</u> of the benchmark for aspects of organization and leadership of staff learning and for its evaluation of staff learning. The organization and leadership of staff learning in the Bank provides for central decisionmaking and monitoring of learning while being responsive to the decentralized nature of the organization. This structure was observed in only one of the B-6 organizations. The quasi-independent evaluation unit that provides evaluation services to the World Bank's

Learning Board is unique among the organizations studied. It is also unique among the multilateral development agencies conducting outcome and impact evaluations, and unique among organizations generally in the impact evaluation designs used. When systems for clarifying staff learning costs at the activity level are in place, WBIEG will be able to undertake empirical benefit-cost analyses of staff learning.

4.37   The World Bank is <u>comparable</u> to benchmark organizations with respect to alignment of staff learning with business needs, learning targets, process for budget allocations to staff learning, average expenditures, and implementation of a LMS. The World Bank is among the majority of organizations that seek to have learning programs aligned with core business goals. Like other organizations, the processes for ensuring alignment are under development. Most organizations examined set targets for some dimensions of learning, but the World Bank does not have formal targets. However, the Bank monitors KPIs that other organizations list as their targets. Decisions for budget allocations for learning are made centrally in the multilateral development agencies examined and delegated to "lines of business" in the private-sector organizations. The World Bank blends these two approaches with centralized decisions regarding the size of the budget and decentralized decisions regarding allocations within this budget. Measured as a percent of payroll, World Bank resources allocated for learning appear to be on target with benchmark organizations. Finally, like most other organizations examined, the World Bank is in the process of implementing a learning management system that will integrate a number of existing functions related to staff learning and provide a "learning portal" for staff to readily access learning.

4.38   The World Bank appears to be <u>below</u> the benchmark for the use of technology in learning. The World Bank has some innovative uses of technology in learning delivery such as the e-learning in TLAP. However, the Bank delivers only 5 percent of all staff learning activities through technology and uses a blended approach for only 1 percent. Although the World Bank has identified using technology for learning as a priority, it currently falls short in this area.

5.   CONCLUSIONS AND RECOMMENDATIONS

5.1   Like the learning agendas pursued by the LLC and the KLC, the SLF prescribes learning that is demand driven, aligned with business results, supported through "alternative modes" or new forms of pedagogy, and systematically monitored and evaluated. The ART conducted in 2001 that laid the groundwork for the SLF was designed with the recognition that previous systems had not been effective in achieving the needed results. The resulting framework therefore represents a systemic change from previous arrangements for staff learning, and the first phase has focused on implementation: defining a new structure to support demand driven decentralized learning, establishing reliable administrative data systems, instituting review processes, and evaluating programs to identify results.

5.2   The scope of this study did not allow for a VPU-level analysis of how well learning is linked to business objectives under the SLF; however, the findings presented throughout this report do highlight key accomplishments and issues to guide future changes. The central hypothesis of this review is that the SLF has led to improvements in the relevance, efficiency, and effectiveness of staff learning for the Bank as an institution. This hypothesis is based on a series of assumptions related to the governance, resource management, design and delivery, and evaluation of staff learning. This final chapter examines some of these assumptions in light of the issues discussed previously and presents recommendations to strengthen Bank staff learning in the future.

GOVERNANCE

5.3   The SLF reflects major organizational changes including the appointment of a CLO and the establishment of a Board to govern staff learning. The CLO, in consultation with the Knowledge and Learning Board, is accountable for promoting the effective and efficient use of resources to equip staff with the skills, knowledge, and behaviors needed to achieve the desired business results. While the new organizational structure has been successfully instituted, the findings of this review raise questions about three key assumptions:

- Assumption 1. *The Staff Learning Framework has clearly defined objectives with corresponding indicators.* The Learning Board is accountable for the success of the new framework, but successful staff learning for the Bank has not been clearly defined. The current SLF objectives reflect priorities rather than measurable targets. To date, the Learning Board has gauged success by tracking the launch of new initiatives and staff participation in priority areas and associated evaluation results where available.

- Assumption 2. *The roles and responsibilities for establishing the overall strategy and policies for staff learning are clearly defined.* Stakeholders

expressed confusion about their roles as Board members and concern about the Board's ability to function as a decisionmaking body given its size and composition. In addition, some stakeholders reflected that the lack of clear roles and presence of competing interests led to conflict during Board meetings.

- Assumption 3. *The process for setting learning policy and making other decisions related to governance is clearly defined.* Interviews revealed disagreement about how voting rights are assigned to VPUs and how the work plan and meeting agendas for the Learning Board are established. Board members were uncertain about when decisions would occur through a Board vote and when they would simply be made by the CLO.

5.4   The SLF continues to evolve and to enact structural changes. Starting in FY06, the Learning Board has been replaced with the Knowledge and Learning Board. Stakeholders expect the composition of the new board to resolve some current issues such as uneven member profiles and competing interests given the requirement that members be at a senior level (salary grade GH or above) and the appointment of a governing council for corporate policy and strategy issues. Roles, responsibilities, and procedures have been drafted for the new Board that should clarify processes for setting meeting agendas and establishing new policies. However, these new terms of reference have not yet been approved despite efforts to do so.

5.5   Findings from this review are likely to be useful to the new Knowledge and Learning Board as it continues to institute changes. The top priority of the KLB should be to address challenges related to governance. Suggestions to make the governance of staff learning more effective and cohesive (without centralizing additional functions) include:

- *Establish a definition of success for staff learning at the Bank against which to gauge progress.* In keeping with the Bank's decentralized structure, objectives may vary by VPU according to different lines of business. However, policies and plans for staff learning should be driven by concrete objectives with associated indicators to measure success. These indicators must extend beyond participants' reactions to track outcomes and impact.

- *Provide clear justification for the assignment of voting rights.* The rationale for decisionmaking authority should link to concrete objectives for staff learning. Issues that need clarification include why Board members receive only one vote regardless of the number of staff they represent and why some VPUs have only observer status.

- *Honor members' areas of expertise.* Divisive dynamics during Board meetings could be minimized by recognizing the value of different stakeholders. For example, experts or "champions" could be identified for learning specialization, operations experience, innovative regional initiatives, or other areas of expertise. Openly identifying the value or role of each member would have both cultural and practical importance. First, members would understand their purpose for serving on the Board and feel more

empowered to contribute their expertise. Second, members would know whom to consult for specific matters or challenges, a valuable orientation given the Bank's decentralized structure.

- *Assign members more control of the Board's meeting agendas.* Members expressed an interest in having more power to own meeting topics, including presenting a promising initiative of their VPU; joining with colleagues on the Board to report on a collaborative effort; bringing in an outside speaker to address a relevant topic; or using the time to solicit ideas for addressing a current area of concern. Since the transition of the Learning Board to the KLB, opportunities have increased for members to propose items for the agenda.

- *Use subcommittees to address corporate challenges or to launch Bankwide staff learning initiatives.* The role of subcommittees should be formally defined in the policies and procedures of the new Knowledge and Learning Board. The strategic use of subcommittees would allow for effective discussion and efficiency given the large size and diverse composition of the Board.

RESOURCE MANAGEMENT

5.6 The SLF was designed to support demand driven learning aligned with business results. Major organizational and procedural changes were designed to promote the effective and efficient use of resources. Key changes include establishing an accountability framework managed through the CLO's office, in consultation with the Knowledge and Learning Board, consolidating learning funds under the Learning Board, establishing a learning plan process for VPUs, and eliminating internal course fees (the "chargeback" system). However, this review did not identify clear evidence that learning resources are now used more effectively or efficiently than they were under previous arrangements for staff learning. Issues related to resource management are linked to two general assumptions:

- Assumption 1. *A formula has been established for allocating learning resources to VPUs.* Many Board members expressed confusion about how resources for staff learning are distributed among VPUs. The description of the allocation process in Board meeting minutes does not convey a clear formula or provide justification for funding decisions.

- Assumption 2. *The allocation of learning resources is aligned with the Bank's business objectives.* A formal process has been established for VPUs to develop learning plans linked to their work plans, and VPUs submit quarterly progress reports to ensure that funds are used as planned. However, VPUs use a range of methods to assess staff learning needs and some base their plans on anecdotal information or simply repeat learning offerings from the previous year. In addition, some VPUs have not had any of their programs evaluated except at level 1 (participant reaction), and information on outcomes and impact is critical for assessing whether learning contributes to business results.

5.7   Procedural changes instituted under the SLF provide clear opportunities to direct learning resources toward corporate priorities. The issues noted above support the following recommendations to strengthen resource management:

- *Establish a transparent process for allocating resources for staff learning. Board members, the CLO, and the governing council should work together to develop and institute this process.* Board members need to understand how funding decisions are made and be able to communicate these decisions accurately to their VPUs.

- *Identify standard methods and tools for assessing staff learning needs.* Needs assessments should remain decentralized to identify local demands accurately. However, the Learning Board or CLO's office (through LSG) could establish a repository of tools and methods to improve this process. Examples include how to gain information on staff needs from sector boards, how to conduct staff surveys, and how to conduct focus groups with managers.

- *Use evaluation results to inform learning plans.* Plans for future learning activities should incorporate lessons learned from similar activities or content areas. VPUs should refer to relevant evaluation results in their learning plans where possible to justify initiating new programs or changing the design or delivery of previous ones. This recommendation is linked to the need for more evaluations (see below).

- *Establish a working committee to examine whether the SLF has had an effect on business results.* A study of this issue should include an analysis of VPU learning plans, learning actually delivered, work plans, and evaluation results on operational impact.

<div align="center">LEARNING DESIGN AND DELIVERY</div>

5.8   Unlike the previous arrangements for staff learning, the SLF's emphasis is on quality and results rather than on inputs and outputs. Overall, the quality of learning activities improved from FY03 to FY04 and has been maintained through FY05. More important, the development of a standard level 1 evaluation process has resulted in accurate baseline measurement starting in FY04. This permits assessment of changes in quality over time. Due to the ongoing improvements to administrative data systems, limited information was available for this review regarding changes in the types of learning activities delivered under the SLF, and this raised questions about a key assumption:

- Assumption. *The SLF has promoted the design and delivery of learning activities most appropriate for working adults, which has led to a change in the types of learning events offered* (i.e., more e-learning, peer learning, team-based learning, mentoring, etc.) Administrative data do not provide evidence of significant changes since FY03 in the proportion of activities delivered through new forms of pedagogy.

5.9   It may well be that not enough time has elapsed under the SLF to expect Bankwide changes in staff learning. Promising developments related to learning design and delivery so far have included a broad range of new initiatives targeting priority content areas and innovative programs designed to address persistent needs. Several of these programs to date have enhanced staff capacity, and according to WBIEG studies, three have resulted in operational impact (e.g., MTL Program, TLAP, and the EAP-SAR Learning Program).

5.10   Improvements in learning design and delivery will require that SLCs and regions initiate change, supporting new approaches to staff learning. Suggestions to promote such changes include:

- *Establish a subcommittee to continue monitoring and improving the LMS.* Reliable administrative data are critical both for guiding staff participation and for tracking results. The Knowledge and Learning Board should define roles and procedures for monitoring progress and ensuring that the LMS leads to improved data quality.

- *Establish a clearinghouse of best practices.* As the SLF matures, an increasing number of initiatives are launched or attempted, and systematic evaluation is yielding more information on results. Several stakeholders reported being overwhelmed with information and lacking constructive guidance when they needed it. Establishing a clearinghouse could offer useful direction to learning providers and other stakeholders as needed. LSG and WBIEG could collaborate to develop this clearinghouse, so that lessons gained from evaluation can be applied by learning providers.

- *Clarify the role and availability of the Learning Support Group.* Stakeholders identified LSG as a useful resource for information on learning tools and technologies and hands-on support for designing curricula. Nonetheless, some Board members noted that LSG has limited staff and cannot respond to all requests for help. These members observed that the Board needs to clarify the process for enlisting assistance from LSG, so learning providers understand when to draw on this resource.

EVALUATION

5.11   A major accomplishment of the new framework has been to institute systematic evaluation to monitor quality, provide formative feedback, and identify outcomes. The methodologies used by WBIEG for program evaluation have evolved substantially since the SLF was established and a growing body of evidence on results is now available to gauge progress.

5.12   Monitoring quality and tracking the results of decentralized learning are important centralized functions of the new framework. This review has outlined the clear evolution of evaluation practices under the SLF, but it has also highlighted issues related to two assumptions:

- Assumption 1. *Evidence-based conclusions are used to inform staff learning design and delivery.* More program evaluations are needed to provide evidence of what features contribute to impact for which learning objectives. Some VPUs have not had any of their programs evaluated beyond participants' reaction.

- Assumption 2. *Formal procedures exist for selecting the programs to be evaluated by WBIEG.* Programs designated for evaluation by WBIEG are typically high priority initiatives that reflect a substantial investment in terms of the staff learning budget. However, stakeholders expressed some concern that there was no clear policy for which programs would be selected in any given year.

5.13   The role of evaluation for the SLF has been a major focus of this review because a results-based model for staff learning requires evidence from evaluations to drive continuous improvement. To date, few studies exist that actually report on results linked to the Bank's business objectives. Recommendations to strengthen the evaluation of staff learning include the following:

- *Dedicate a larger share of the learning budget to evaluation activities.* In FY05 WBIEG spent $972,000 of Learning Board resources for evaluation, representing 1.4 percent of the learning budget of $69.5 million. Because the use of evaluation results is likely to increase the effectiveness and efficiency of staff learning over time, more funds should be directed to WBIEG or others to assess outcomes and impact.

- *Evaluate programs across all types of activities and learning providers.* A major design feature of the SLF is the feedback loop to ground learning in results. The Knowledge and Learning Board and WBIEG should be strategic in selecting programs for evaluation, ensuring that all types of activities in use for staff learning are evaluated and that all VPUs that are learning providers receive information on results for at least one initiative.

- *Create a formal process for requesting assistance with administrative data extraction.* Several VPUs expressed interesting in analyzing extant data as part of their own efforts to monitor trends and evaluate program results. They noted that the CLO's office handles requests for assistance with data issues on an ad hoc basis, but not all requests are met due to staffing limitations. The process of this review highlighted many difficulties with extracting BW data and a current need for informed staff to monitor the accuracy of the resulting data files. The Knowledge and Learning Board should therefore establish a procedure for requesting data assistance on a trial basis. This process could provide useful information about how much technical assistance is needed to conduct accurate analyses related to staff learning.

5.14   The SLF appears to be an optimal structure for staff learning at the Bank in that it provides for central decisionmaking and monitoring while being responsive to the decentralized nature of the Bank's business. Centralized functions such as administrative data systems and evaluation services support a cycle of improvement where results can be used to inform learning design and delivery. This results-based framework is likely to optimize the learning available for Bank staff over time. The recommendations presented in this chapter therefore suggest incremental improvements to the current system rather than major structural changes.

5.15   After its first four years, the SLF has provided important groundwork for addressing the pressing business issues identified in the 2001 ART. The findings of this review confirm that this new governance and organizational framework has started to clarify responsibilities for staff learning and increased accountability—particularly through monitoring quality and, in some cases, evaluating program impact. Initiatives launched under the SLF have modeled the effective use of e-learning (e.g., TLAP) and shifted the emphasis beyond a narrow focus on individual technical expertise (e.g., MTL). Interviews with selected staff and results from the staff survey provide some evidence that the Bank's culture is transforming to support staff learning.

5.16   This review also highlights important work yet to be accomplished. The challenges put forth by the 2001 ART have not yet been successfully met. The Learning Board must still prioritize the strengthening of operational training and the development of a cohesive management curriculum to support managerial excellence. Learning activities often still rely on tools and methods that are not aligned with adult learning needs. Incremental changes are needed to strengthen the learning infrastructure, including further clarification on the appropriate roles for regions and networks and a more systematic approach to identifying opportunities for collaboration among VPUs. Most important, the Knowledge and Learning Board must still define the indicators of success, through which to set priorities and gauge progress towards the SLF objectives in the future.

APPENDIX A:
METHODOLOGY

This independent review of the Bank's Staff Learning Framework was conducted by Dawn Roberts, Lead Review Consultant, and Toni Hodges, Benchmarking Consultant. The study relied on existing documents and archival data within the World Bank related to staff learning and interviews with 74 Bank managers and staff. In addition, the benchmarking component of this study included a review of ASTD data and interviews with staff learning representatives of six large and decentralized organizations.

EVALUATION QUESTIONS

The CLO and the KLB have responsibilities in four areas: Overall strategy and policy, resource allocation, communication, and monitoring and evaluation. The terms of reference (TOR) tasked this review with assessing the organizational structure and implementation of the SLF with respect to these four areas. The review compared the SLF with previous arrangements for staff learning and identified recommendations for improvements according to the following evaluation questions in the TOR:

Summary assessment - Objectives and organizational structure of the SLF

Objectives of the SLF

(a) What were the SLF's documented objectives at the time establishment? How, when and why have objectives evolved since the establishment of the SLF? Are the current objectives appropriate for the institution? How clearly are the objectives defined?

(b) Are the current objectives appropriate for the institution? How clearly are the objectives defined?

- How do the Bank's SLF and Business Plan align? Do key stakeholders know about and/or share ownership in that alignment?

- If the SLF is the Bank's "learning and knowledge management plan" and the Business Plan is its "doing plan," what opportunities are created to integrate these SLF and Business plan so that the Bank can better learn from doing?

(c) How do original and current SLF objectives differ from those under the pre-SLF learning structure?

(d) How should the SLF objectives be modified to better support staff learning?

Organization and membership

(a)   What was the previous organizational structure for learning in the Bank? How does the current structure differ from the organizational structure before establishment of the SLF?

(b)   How are the objectives reflected in the overall organizational structure of the SLF?

(c)   What criteria were used in establishing/refiguring the LB and determining its membership? What are the operating, reporting, and monitoring arrangements? What mechanisms are in place to resolve differences among members and competing interests? Is the current LB structure an optimum one as a decisionmaking body?

(d)   How have SLF structures and processes helped the Bank meet key desired objectives of the FY01 reorganization and strengthened the Bank as a learning organization?

- Does the SLF structure/process create integrative learning strategies in support of the Bank's goals?

- Does the structure ensure that its trainers, consultants, and learning providers are grounded in the real world challenges and needs of the field?

(e)   How does the organizational structure and processes compare with other large organizations - especially those with diverse staff members who operate globally - in implementing broad-based learning for their staff? What are some best practices in staff learning at these organizations that the SLF might consider adopting?

(f)   How should the SLF organizational structure, membership, and processes be modified to achieve greater relevance, efficiency, and effectiveness?

Implementation – assessing SLF responsibilities

Overall strategy and policy

Establishing overall strategy, policies, and priorities

(a)   What overall strategy, policies, and priorities have been established by the SLF? How and why have the strategy, policies, and priorities been established?

(b)   How do the SLF's overall strategy, policies, and priorities differ from those under the pre-SLF staff learning structure?

(c)   What are the expected outcomes of the overall strategy, policies, and priorities, and how well are they aligned to institutional goals?

(d)   How should the SLF overall strategy, policies, and priorities be modified to achieve greater effectiveness?

Providing guidance to Bank units on corporate learning strategies and priorities

(a)   What guidance (formal and informal) does the SLF provide to Bank units on corporate learning strategies and priorities? Is the received guidance sufficient and effective for Bank units?

(b)   How does the SLF guidance differ from that provided under the pre-SLF staff learning structure?

(c)   How have learning planners and content developers and deliverers been supported by the SLF?

(d)   How are the views of staff reflected in the overall learning plans and in the design and implementation of specific programs?

(e)   How should the SLF adjust its existing mechanisms for providing guidance to Bank units?

(f)   What steps have those responsible for staff development and learning taken to enhance their own learning about the day-to-day needs of field staff?

Review learning design and delivery, both from a strategic and quality vantage point

(a)   What procedures and systems has the SLF established to review learning planning, design and delivery? Are these appropriate procedures and systems?

(b)   What review systems for learning planning, design and delivery were in place prior to the establishment of the SLF?

(c)   Since the commencement of the SLF, what changes have occurred in the type of learning opportunities delivered by content providers and received by staff?

(d)   Since the commencement of the SLF, what changes have occurred in the quality of learning opportunities delivered by content providers and received by staff?

(e)   What evidence is there that learning opportunities are appropriate for staff? Are staff needs being met in terms of design? Are staff needs being met in terms of delivery modalities? How are staff needs measured?

(f)   How do the overall strategy, policies, and priorities ensure that staff receive desired and appropriate content, aligned with business needs? How responsive has the delivered content been to the expressed knowledge and needs of the institution and staff?

(g)   How does the Bank tap into the social capital, knowledge, skills, and success stories (teaching, learning resources, success models) of its own HQ and field staff?

(h)   How should the SLF adjust its existing review mechanisms?

Resource Allocation

(a)   Is there a mechanism to ensure that the resources allocated are utilized effectively and efficiently?

(b)   What are the differences in terms of how resources are allocated and amount of resources allocated under the SLF compared to the previous staff learning arrangements?   Is there any evidence that collaboration has increased and duplication of efforts has been reduced?

(c)   What are the decisionmaking mechanisms for allocating resources?

(d)   How does the SLF promote cost effectiveness in activities that it sponsors? Do adequate incentives exist for cost-containment by learning centers?

(e)   What are actual total direct costs of staff learning? What data are available on unit costs of preparation and delivery? How accurate are these data?

(f)   What systems does the SLF have in place to monitor resource use? How accurate are the data generated from the system?

(g)   Since the commencement of the SLF, what changes have occurred in the quantity of learning opportunities delivered by content providers and received by staff?

(h)   What should the SLF do to ensure that the resources allocated are utilized more effectively and efficiently?

Communication

(a)   What information and guidance on learning does the SLF provide to staff?

(b)   How do current SLF communication initiatives to promote and inform on staff learning differ from those under the pre-SLF learning structure?

(c)   How effective are the SLF's communication initiatives in providing staff with appropriate information and guidance on learning?

(d)   Have communication efforts in the SLF resulted in changes in the type and amount of learning undertaken by staff?

(e)   What should the SLF do to improve its communication strategies?

Monitoring and Evaluation (M&E)

(a)   How does the SLF effectively monitor and evaluate results of the learning programs and activities? How efficient are the monitoring and evaluation systems and procedures?

(b)   What were the monitoring and evaluation mechanisms for staff learning prior to the establishment of the SLC?

(c)   How does the SLF make use of the evaluation results to improve the activities and programs it funds?

(d)   How does the SLF effectively monitor access to learning? How does the SLF effectively monitor learning quality?

(e)   What should the SLF do to ensure that its M&E strategies are more effective and better used?

(f)   What steps has the Bank taken to ground learning in results?

DATA COLLECTION

Qualitative interviews served two major functions in this review. First, they oriented the lead consultant to available data sources. Second, they provided the opportunity to explore the insights and experiences of a range of staff learning stakeholders. The purposeful sample of individuals selected for interviews were those most likely to have extensive knowledge about the Bank as a learning organization. Within the World Bank, these key informants included 43 current or former Learning Board members, observers, or direct support;[34] and 8 individuals heavily involved in the transition to the SLF.[35]   In addition, staff perspectives and experiences were explored by first interviewing three sector managers and then interviewing 28 staff—9 of these at headquarters and 19 in the field.[36] Overall, a snowball sampling process was used, where well-situated people (such as Learning Board members) identified others knowledgeable about staff learning.

Interviews relied on an open-ended protocol but also allowed for stakeholders to raise and explore issues they believed were critical. Most of the sessions with Learning Board stakeholders lasted 45 minutes to an hour. In most cases, these interviews were in-person, with the author meeting individually with the key informant. In four cases, Learning Board stakeholders met with the author in pairs. The 28 interviews with staff were conducted by telephone and lasted an average of 20 minutes.

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[34] These include current and former members of WBIEG, HRSLB, and LSG.

[35] This list of Learning Board stakeholders is 46 since some current and former members were involved in the transition and therefore appear in more than one category.

[36] Staff were at various levels: one individual interviewed in the field was also a sector manager.

In addition to data from interviews, the authors reviewed and analyzed reports and data related to learning activity design, delivery, participation, and costs. Reports from the Learning Board and from WBIEG evaluations were also reviewed. Other documents that provide information on previous arrangements for staff learning or specific staff learning initiatives were identified and collected from individuals' archives during interviews. In some cases, these documents contain important details (such as the topics and teams of the 2001 staff learning ART) but lack authors and dates.

The author did not have direct access to Business Warehouse or PeopleSoft data related to staff learning, but WBIEG facilitated requests for datasets to analyze trends in staff learning activities and participation over time. WBIEG provided 12 files with BW and/or PeopleSoft data during this review, but the analyses of these files revealed a high number of unassigned or missing values (up to 40 percent of the fields) and a potential problem with double-counting. Staff in the CLO's office provided clarification on data issues. One set of findings in this review focuses on the improvement of data quality over time (a major accomplishment of the SLF), and the data analysis contributed to the understanding of data system issues rather than producing new information regarding the type or quality of learning events delivered to World Bank staff.

ANALYSIS AND REPORTING

Qualitative data from the document review and interviews were sorted and coded according to major themes. As data gaps and discrepancies were identified, the lead author drew on the assistance of the WBIEG TTL and staff learning key informants to locate additional information. Recurring issues or themes that emerged from interviews are included in this report if they are relevant to the evaluation questions and surfaced in at least three interviews. In some cases, direct quotes convey the thoughts of Learning Board stakeholders or staff, but these are presented only if they reflect a recurring theme (among Learning Board stakeholders) or an interesting perspective on learning (among staff) while preserving confidentiality.

APPENDIX B:
BEFORE THE NEW STAFF LEARNING FRAMEWORK: A BRIEF HISTORY

In FY96—the year of its commitment to become a "Knowledge Bank"—the World Bank Group initiated a new education and training effort to raise the professional standards and diversify the skills of its staff. The new programs were designed to "help strengthen management capacity across the Bank, restore the Bank's skills base, and ensure professional excellence at all levels, enhancing the Bank's awareness and competitiveness" (World Bank 1996). The Strategic Compact (1997) then launched a number of renewal initiatives, including a comprehensive reform of the Bank's human resource policies.

As an expression of the Bank's business strategy, the Compact emphasized that business needs should drive learning, that learning contributes to excellence, and that learning alongside clients can enhance development effectiveness. A critical requirement of the Bank's new vision was "to equip staff with the cutting-edge knowledge, skills, and tools to fight poverty and build client capacity." As a result, the Bank Group formally prioritized professional development and endorsed spending 5 percent of its net administrative budget on staff learning, a benchmark based on comparable "knowledge" firms (World Bank 1999a and World Bank 2000b). At this time, the major provider for learning and training activities for staff was the Learning and Leadership Center (LLC) while the one for clients was the Economic Development Institute (EDI). The Governing Council for Learning and the Information and Knowledge Management Council shared the governance of learning and knowledge management activities.

The learning agenda pursued by the LLC explicitly recognized the need to:

- "have users strongly influence learning services;

- become a competency-based organization where learning is a business-driven responsibility of staff and managers;

- exploit the synergy between staff and client learning;

- support alternative modes of learning; and

- monitor and evaluate learning activities for effective use of resources (World Bank 2000b)."

Despite these stated priorities, measures of success focused mainly on such outputs as the numbers of learning events and staff training days. A snapshot of LLC accomplishments for FY98 includes the following data on activities and participation:

- "Over 9,000 staff and managers attended more than 600 learning/training activities,

- 240 managers and potential managers attended the Executive Development Program (EDP),

- 15 Sector Weeks, organized by the Bank's new professional networks brought together more than 3,300 staff and outside specialists,

- 39 staff undertook external development assignments, providing them with targeted learning opportunities,

- The Presidential Fellows Program brought 7 eminent specialists and scholars to the Bank,

- The LLC continued its partnership with the IMF Institute to offer courses for Bank and IMF staff; and

- The LLC offered 22 programs jointly with EDI where Bank staff and client country participants studied subjects such as managing capital flows, rural transport, and advance macroeconomic management (World Bank 1998a)."

The structure for learning and knowledge management was streamlined in FY99, with the merger of EDI and the LLC into the new World Bank Institute (WBI), and the merger of governance functions into the new Knowledge and Learning Council (KLC).[37]

THE KNOWLEDGE AND LEARNING COUNCIL'S ROLES AND RESPONSIBILITIES

The KLC was coordinated by a secretariat and consisted of a dozen Bank vice presidents who met quarterly to promote coherence among the various learning programs and to integrate them with the Bank's core work programs. The director of the newly created WBI reported directly to the KLC, which—like a board of directors—oversaw the implementation of the learning agenda.[38] Key responsibilities for staff learning were distributed as follows:

- The KLC was responsible for governance—including setting overall strategy, allocating resources for learning design and delivery, and monitoring performance and quality.

- WBI was accountable for the implementation of the learning agenda. WBI delivered client learning, staff training in functional skills, and general learning services.

- Networks provided professional and technical (P&T) learning. WBI's director and the vice president of Operation Country Services (OCS) shared oversight for the P&T program.[39]

- Human Resources (HR) was responsible for leadership development programs and behavioral learning.

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[37] The KLC governed staff and client learning as well as knowledge sharing. The focus in this report is limited to staff learning since that is the function analogous to the current Staff Learning Framework.
[38] WBI did not become a vice presidency until 2000.
[39] The World Bank Group pursues its work through vice presidential units (VPUs) that focus on a particular region or sector to fight poverty and encourage economic development. Those VPUs focused on specific sectors are known as "networks." The number and names of networks have evolved over time: Operation Country Services (OCS) is now known as Operational Policy and Country Services (OPCS).

- Regions and other vice presidential units (VPUs) funded staff time and travel for staff to attend learning activities and delivered their own events related to specific VPU priorities. The role of regions and other business units in the implementation of the learning agenda was not clearly defined, and regional programs tended to be small and informal.

Resource allocation under the KLC included a bureaucratic chargeback system that would later be eliminated under the new SLF. Under that system, the KLC embedded 80 percent of the funds allocated for learning in the individual budgets for the networks, HR, and WBI. The remaining 20 percent was earned in the form of course fees through an internal transfer from the budget of the trainee's unit to the supplier's. This so-called "chargeback" was the mechanism by which a staff member's organizational unit was charged for participation in a specific training event. All organizational units in the Bank had a real or notional budget for staff training in their discretionary dollar budgets that could be spent internally or externally on the direct costs of staff training, including chargeback.

PRIORITIES OF THE KLC

In several ways, the KLC-administered system for staff learning served as a stepping stone from previous professional development arrangements to the SLF now in place. The Working Group on Learning under the KLC highlighted a series of priorities in its first progress report (September 1998):

- "Focus should move from inputs to learning goals and results,

- Users should have strong influence on learning services,

- There should be flexibility to support alternate modes of learning, and

- Service providers must be responsive to users on quality, format, and cost effectiveness" (World Bank 1998b).

During FY99 and FY00, the KLC and staff learning stakeholders took steps towards system reform, linking learning activities to business objectives, developing new monitoring and tracking processes, and beginning to evaluate results.

Integrating learning and business planning

Among the governing principles for the learning agenda was the assertion that the learning strategy had to be "business needs driven." As shown in figure 9, the KLC worked to clarify how learning activities could be aligned systematically with business objectives. The KLC was designed to be a "visible governance structure that signals an acknowledgment that senior management is fully committed to staff learning," so that units would work intentionally to ensure that staff have the skills and competencies needed to achieve the Bank Group's business goals (World Bank 1999b).

Figure 9. The working group on learning, September 1998
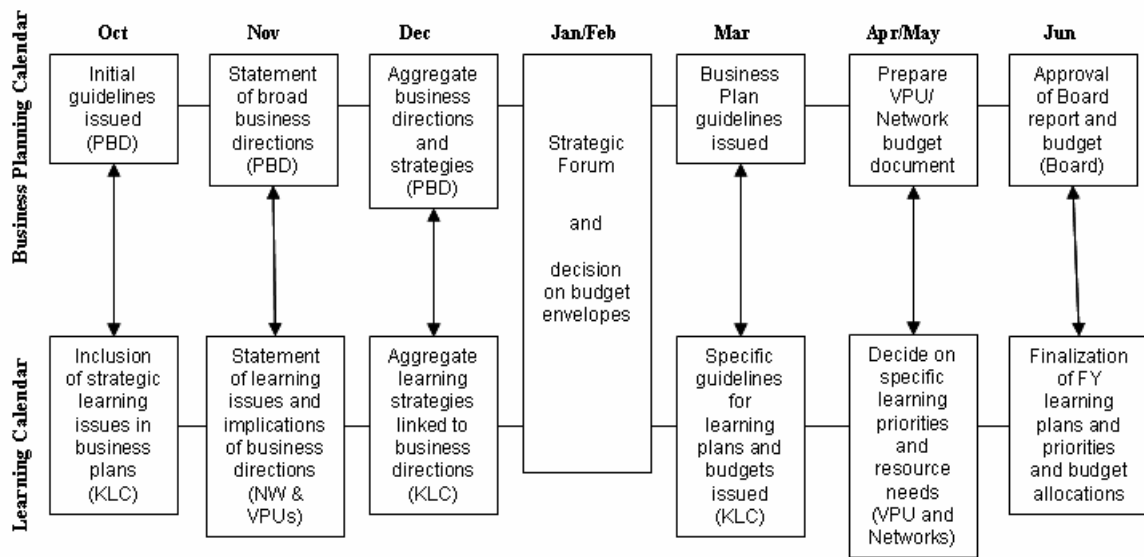
Note: This figure is provided to illustrate efforts under the KLC to align learning with business planning. PBD refers to the Programming and Budgeting Department and NW refers to Networks.

Despite increased emphasis on linking learning to business results, little evidence was available for this review of which learning activities were being designed specifically in response to staff needs to perform their work plans better. At the end of FY98, a task force appointed by the KLC recommended establishing a three-year agenda to ensure that business needs drive learning decisions and, in particular, to create greater transparency in the deployment of regional learning resources to fill strategic gaps (World Bank 1999b).

Monitoring

The KLC recognized the need for a comprehensive system to track learning. A KLC working group developed the concept for this system to record all learning activities, both formal and nonformal, that WBI, the networks, or external vendors provided. A key part of this vision involved moving away from simply tracking staff training days and the number of activities and instead using a learning scorecard focused on five indicators:

a. **Total learning investment** as a percent of total budget: Training delivered and received would be captured separately. The cost of staff time would be included only for training received. The total learning investment would represent the sum of both training delivered and received.

b. **Volume of training**, formal and nonformal: The total number of training days by provider would be captured.[40]

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[40] Formal learning activities include structured classroom training organized for the acquisition of new and well-defined knowledge and skills. Nonformal learning activities are for continuous learning and cover a

c. **Cost per training day** by program: Programs were defined within the broad categories of leadership, professional and technical, Bank skills, and external.

d. **Who is being reached**: The profile of participants (headquarters staff, field staff, external participants, salary grades 11-17, 18+, 25+, etc.) would be tracked by share of program costs.

e. **Source of funding,** including the Central Learning Budget (held by HR, WBI, networks), VPU discretionary budget, and the corresponding portion subject to chargeback, or external funding such as trust funds (World Bank 1998b).

Limited documentation from the KLC period was available for this review, but the evidence suggests that development of this monitoring system was deferred until plans for new time recording and cost accounting systems could be implemented.

The new emphasis on monitoring quality rather than quantity was a major component of efforts to improve staff learning under the KLC. In FY99, the KLC requested the WBI evaluation unit to establish a method for monitoring and evaluation. Attention first focused on the quality of the design, content, and learning outcomes of formal classroom training courses of the networks and nonnetworks through participant ratings and comments (level 1) (Rist 1999; World Bank 2001a). A new standard questionnaire was developed for evaluating participants' reactions with questions focusing on relevance, effectiveness, efficiency, potential impact, and the quality of training design and delivery. WBI established a benchmark for quality—consistent with its system for client training—at 85 percent favorable ratings.[41] Quality ratings from a nonrandom sample of participants improved from FY99 to FY00, as shown in Table 22.[42] In FY00, 83 percent of 5,473 participants provided a favorable rating for overall training quality, slightly below the quality benchmark of 85 percent. There was a notable difference between the ratings for network events (77 percent favorable) and those for Bank skills training (e.g., IT ACS, and crossnetwork activities) provided by WBI Skills Development (WBISD, 90 percent favorable).[43]

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wide range of events—including clinics, action-learning workshops, intact team work sessions, brown bag seminars, and discussion group sessions. For a description of these activities, see Prom-Jackson et. al. (2002).

[41] A favorable rating is a 4 or 5 on a 5-point scale. This benchmark was comparable to those set by well-known education and training institutions such as Motorola University and Linkage Incorporated. See Prom-Jackson et al. (1999).

[42] Because a level 1 questionnaire was launched in April 1999, this study is based on the responses of 60 percent of the participants who completed formal classroom training in the fourth quarter of FY99. Results from the former LLC questionnaire were not available for this review. This explains the marked difference in the number of participants between FY99 and FY00.

[43] The methodology for level 1 monitoring has evolved under the new Staff Learning Framework. Changes to this system are discussed in chapter 2.

Table 22. Participants' Evaluation of Formal Training, FY99-FY00

Level 1 Evaluation--Percentage of Participants Rating the Quality as 4 or 5				
Programs	**Number of Respondents**		**Overall Quality Rating**	
	FY99	*FY00*	*FY99*	*FY00*
Bankwide	1,015	5,473	77%	83%
Networks	716	2,604	70%	77%
WBISD	299	2,765	86%	90%

Evaluation

The KLC recognized the importance of evaluating the outcomes of learning programs from the outset. In FY99, the Working Group on Learning noted that "serious evaluation of learning programs beyond self-assessments at the end of a training course has not been done in the Bank." The first formal efforts of the WBI evaluation group in FY99 focused on quality (level 1), and in FY00, the KLC expanded the request to include impact evaluations for formal trainings and the evaluation of sector weeks, conferences designed to provide cutting-edge knowledge on critical issues and to create opportunities for network staff to meet others facing similar challenges. Plans for these studies are noted in KLC documents, but systematic evaluation beyond participant reaction was not implemented for staff learning until after the new SLF was established.[44]

THE KLC'S ACCOMPLISHMENTS AND CHALLENGES

The KLC achieved much, but many challenges remained. A review of documents and interviews with stakeholders indicated that several enhancements for professional development were explored under the KLC. Interest was especially notable on rethinking the appropriate measures of success. Despite the new evaluation framework and plans for a comprehensive tracking system, the indicators reported by the KLC still emphasized the number of training days (table 23).

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[44] For example, WBIEG completed an evaluation of FY02 Sector Fora in FY04. See Eckert et al. (2004).

Table 23. Number of training days delivered, FY99-00

	FY99	FY00
Professional and Technical Training (Networks)	**25,008**	**33,967**
Environmentally and Socially Sustainable Development (ESSD)	3,947	4,470
Finance, Private Sector, and Infrastructure	4,808	7,860
Human Development Network (HDN)	5,257	4,317
Operation Country Services (OCS)	6,609	9,169
Poverty Reduction and Economic Management (PREM)	2,740	2,675
Other VPUs	1,647	5,476
Institutional Skills (WBI)	**16,280**	**16,478**
Information Technology	5,198	2,303
Languages	5,007	5,928
Communications	1,679	2,513
Field Office Program	2,553	2,898
Other Programs	1,843	2,836
Behavioral Training	**8,301**	**7,533**
Executive Development Program (EDP)	5,439	5,010
Non-EDP	2,862	2,523
Total	**49,589**	**57,978**

Source: *KLC 2000.*

The numbers in table 24 indicate the general distribution of training activities across units and content areas, but it is important to note that these numbers cannot be meaningfully compared to learning activities supported by the current system. The SLF's objectives promote new forms of pedagogy, offer fewer formal training activities, and apply performance criteria rather than just counting training days.

Little information on the results of training activities during this period was available for this study, but the survey of all Bank staff periodically administered by HR did reflect incremental improvement in staff perspectives on training between 1997 and 1999. Sixty percent of staff in 1999 responded favorably to "My manager has given me the time to take advantage of training opportunities" compared to 46 percent in 1997. For "My opportunities for training have increased," 49 percent responded favorably compared to 41 percent in 1997.[45] While these results represented positive changes, the KLC recognized that the ratings remained low, one of many factors signaling the need for improvements in the Bank's learning organization.

In FY01, the Bank launched a comprehensive review of staff learning designed to evaluate the strategic direction of learning in the Bank and to identify high priority action recommendations to strengthen the impact and effectiveness of the staff learning program (World Bank 2001b). This exercise confirmed that progress had been achieved in retooling the technical skills of staff since the Strategic Compact, but it also highlighted some serious shortcomings of staff learning under the KLC:

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[45] These results cannot be directly compared to those under the SLF because the survey questions have changed. Also, response rates on the staff survey were notably lower in 1997 (50 percent) and 1999 (55 percent) then in 2003 (83 percent). A discussion of later survey results and their relationship to these under the KLC is provided in chapter 3.

- The emphasis on individual technical expertise was out of step with the Bank's strategy and business needs.

- The learning tools and methods in use were not aligned with adult learning needs.

- There was insufficient ownership and accountability for learning in the governance and organizational framework.

- Transformation of the learning program would require significant changes in the Bank's culture—particularly with regard to trust, accountability, and selectivity.

In response to these challenges, 60 staff representing all key stakeholders (including country and sector directors, field and headquarters staff, ACS staff, internal and external learning experts, and personnel from the International Finance Corporation) met in March 2001 to identify key measures for strengthening the impact and effectiveness of staff learning. The team used the participatory "Accelerating Results Together" (ART) process to accelerate organizational change and focused on the "most pressing business issues for FY02":

- Design and delivery of learning for two critical groups flagged in the Strategic Forum 2001 discussions: leaders/managers and operational task teams;

- development of more effective learning tools and methods than those currently in use; and

- strengthening the learning infrastructure, including governance, organization, and resource management.[46]

The new SLF is a direct outgrowth of this effort.

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[46] As described in the scoping document for Accelerating Results Together: Staff Learning. The four teams for this ART were (1) Leadership/ Management Learning, (2) Operational Task Team Learning, (3) Tools and Methods, and (4) Governance and Organization.

APPENDIX C:
LEARNING BOARD ROLES AND RESPONSIBILITIES AND OPERATING GUIDELINES (FY05)[47]

ROLES AND RESPONSIBILITIES

The Learning Board is dedicated to building a world-class learning organization to further the Bank's mission to fight poverty. The Learning Board is responsible for providing leadership throughout the institution on all matters related to staff learning. It is accountable for aligning learning with business needs; allocating resources accordingly; and monitoring and evaluating results.

In all of its endeavors the Learning Board seeks to provide an enabling environment for effective staff learning. Based on changing business needs and the focus on CDFs and PRSPs, a new staff learning framework has been developed. The Learning Board is the driving force for its implementation, including the following key aspects:

- A shift from "individual training" to "team-based" learning.

- Redesigned learning tools and methods, with less reliance on formal classroom training and more on e-learning and action learning (just-in-time team learning while "on the job").

- Greater selectivity in professional and technical training, with an increased focus on behavioral, relational, managerial, and integrative skills for all staff.

- Increased accountability for learning, with the Learning Board recommending to Senior Management changes in procedures and organization, as needed, and spearheading the development of a Bank-wide monitoring and evaluation system for staff learning.

The Learning Board has a mix of oversight, advisory, and decisionmaking roles. Specific responsibilities include the following*:

Policy and Strategy
- Formulates for senior management approval staff learning policies, strategies, and priorities

- Provides guidance to VPUs on corporate learning strategies and priorities, and where needed, works with VPUs to align VPU and corporate learning strategies and plans.

- Recommends to senior management organizational changes for more effective learning delivery

- Reviews, and where necessary, sets standards for learning design and delivery

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[47] Staff Learning Website

- Reviews, and fosters, as appropriate, innovative learning approaches and methodologies

- Oversees communication on staff learning, including periodic updates and the learning catalog, and builds partnerships with relevant internal and external groups.

Resource Management

- Recommends for senior management and board approval the level of funding for the Bank's learning program each year and defines guidelines for allocation of the annual budget envelope received.

- Develops guidelines for VPU Learning Activities and the preparation of annual VPU learning plans.

- Reviews VPU learning plans in light of corporate priorities and allocated resources

- Reviews learning providers' annual work plans in light of VPU learning plans and available resources and approves annual budget allocations to each provider.

Monitoring and Evaluation

- Ensures that systematic monitoring and evaluation are incorporated in learning activities.

- In conjunction with VPUs, develops a comprehensive monitoring system for all Bank learning activities, including the systematic, quarterly monitoring of implementation of learning plans and use of resources.

- Sets priorities for evaluation of learning activities and develops guidelines on evaluation requirements.

- Reviews evaluation results and feeds them back into the formulation of learning policies and strategies.

*This list of responsibilities is a preliminary list and subject to change over time.

Membership

The designated member needs to have sufficient seniority to decide things on behalf of the VPU and communicate on learning matters throughout the VPU. The LB representative should be the substantive focal point for learning in the VPU.

For each principal member, there should be a designated alternate. The policy will be that the principal member should normally attend LB meetings.

Composition

In addition to the CLO, there will be 18 voting members of the LB, one each from:

- SLCs (11 total)
- Regions (6)
- WBI
- IFC
- MIGA

The following entities will be allowed one member with observer status:

- DEC
- LEG
- RM (Resource Management)
- EXT
- LSG, WBIEG, and KLE Program will be invited to attend each Board meeting (with observer status).

Meetings

Meetings will normally be held once every other week, with longer intervals between meetings during the summer and year-end holiday seasons. When needed, the Learning Board will convene weekly.

Each meeting will be clearly designated as informational, decisionmaking, or in limited cases, both.

If a powerpoint presentation will be discussed at a meeting, the powerpoint presentation should be circulated via email to members no later than the evening preceding the meeting.

Decision making

Both voting and observer Board members will normally be invited to all meetings. The usual mode of decision making will be by consensus or majority agreement, preceded by discussion among all members present.

Occasionally, when required, there will be a more formal voting process with voting limited to the 18 voting members (or designated alternates) of the Board. The CLO, if needed, would cast the 19th (and deciding) vote.

In any meeting where decisions are required, at least 3 Regions and 5 SLCs must be present.

If such a quorum is not present at a meeting where a decision is required, limited discussion of the topic will take place at the meeting. After the meeting, the CLO will contact via email those members who were not in attendance. Based on the discussion at the meeting and the subsequent views via email, the CLO would then make the relevant decision(s) and communicate this decision to the membership.

Other

The Learning Board will create its own team learning plan.

On occasion, Board members will be asked to lead and/or participate in task forces, and they agree to commit the time necessary to make such task forces successful, with their time compensated for by the CLO's office, if necessary.

APPENDIX D:
CHARACTERISTICS OF ASTD BEST LEARNING ORGANIZATIONS

Investment	On average, the BEST spend more, but many spend less.
Measurement	• The BEST demonstrate effectiveness by monitoring individual and organizational performance indicators and linking changes in performance to learning and nonlearning performance improvement activities. • The BEST demonstrate the efficiency of the learning organization by monitoring time and cost indicators and linking decreases in time and costs to changes in the processes and practices of the learning function.
Efficiency	The BEST maximize the efficiency of the learning organization by centralization, internal process improvement, use of technology, and strategic outsourcing.
Effectiveness	The BEST maximize the effectiveness of learning on individual and organizational performance by aligning learning activities with business needs, and providing timely access to relevant learning opportunities.
Alignment	• The BEST have formal processes to align short- and long-term business strategies with competency, learning, and performance solution needs and priorities. • The BEST map learning resources to competencies, individual development plans, jobs, and corporate goals.
Learning Opportunities	The BEST provide a broad range of internal and external formal and informal learning opportunities, including leadership development, knowledge sharing, coaching, and conference attendance.
C-level Involvement	Most of the BEST have a chief-level learning officer and involve leaders as teachers.
Nonlearning Solutions	The BEST combine learning with other performance improvement solutions, particularly process improvement strategies, to increase retention, satisfaction, quality, productivity, revenue, and profitability.

Source: Sugrue 2004.

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