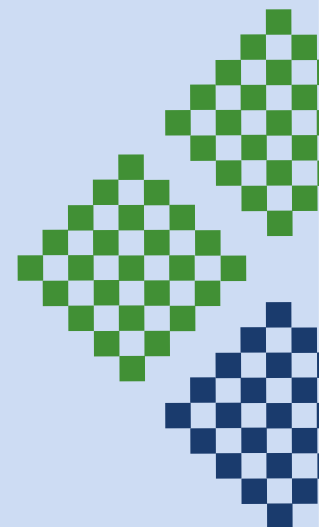


Practical guides for collaborative and complexity-aware practice

Will Allen

Keeping the work connected

Planning, monitoring, evaluation
and learning in place-based and
multi-actor initiatives



Keeping the work connected:

Planning, monitoring, evaluation and learning in place-based and multi-actor initiatives

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This guide brings together ideas and practical resources on planning, monitoring, evaluation and learning in place-based, community-based and other multi-actor settings. It focuses on how these practices can help keep the wider work connected, so that evidence, judgement and learning can inform decisions and adaptation as circumstances change.

The guide draws on material developed and curated through the Learning for Sustainability website, together with experience from evaluation, facilitation, collaborative planning and adaptive management practice. It is intended as a practical orientation rather than a fixed framework or comprehensive methods manual.

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Contents

Executive summary.....	4
How to use this guide.....	7
PART 1 Why connection matters	9
1. When the pieces don't connect	10
2. Working with complexity, learning and accountability	13
3. Towards a connected practice.....	17
4. Direction that stays open to learning.....	20
PART 2 Keeping the work connected	24
5. A six-step cycle for keeping the work connected	25
Step 1. Prepare to work with others	27
Step 2. Widen participation and shape the work together	31
Step 3. Develop or clarify the direction	35
Step 4. Frame the questions and criteria that matter	40
Step 5. Choose evidence and learning routines that fit the work	44
Step 6. Use learning for decisions, adaptation and continuity	49
PART 3 Conditions for credible learning and adaptation	53
6. Relationships, ethics and credible judgement.....	54
7. Organisational conditions for learning and adaptation	59
8. A changing landscape for evidence and judgement.....	64
9. What this means for practice	67
References	70
Related Learning for Sustainability resources	72



Executive summary

Place-based and multi-actor initiatives arise in settings as varied as catchment and landscape management, agriculture, community health and local development. They often work with change that cannot be delivered by one organisation acting alone. Progress may depend on relationships, shared decisions, changes in practice, institutional arrangements, ecological or social responses, and wider economic or policy conditions.

Plans, monitoring systems, evaluations and learning activities may all be present without remaining sufficiently connected. Indicators may reflect reporting requirements more than the questions people need to answer. Evaluation may occur separately from implementation. Review meetings may focus on updates and accountability while leaving little space to examine assumptions or reconsider direction.

The result is familiar: considerable information is collected, but people still struggle to understand what is happening, what it means for the strategy, and what should happen next.

This guide offers a practical orientation for keeping strategic direction, implementation, evidence, judgement and learning connected in place-based and multi-actor work. Rather than treating planning, monitoring, evaluation and learning in isolation, it uses them to maintain enough shared reasoning for people to compare intentions with experience, make considered judgements and adapt while there is still time to act. Shared reasoning here means the developing account people hold together about what they are trying to achieve, why they think particular choices may help, what evidence and experience suggest, what they judge to matter, and what should happen next.

Shared reasoning will never be complete or entirely shared. The aim is not permanent agreement or a definitive plan, but to keep enough of the reasoning visible that people can question it, compare it with experience and reconsider it when necessary.

The guide is intended for people involved in shaping, managing, supporting or reviewing place-based and multi-actor initiatives, whether from programme, facilitation, evaluation, advisory, governance or funding roles.

Structure and emergence

Such initiatives usually contain both relatively structured and more emergent elements. Some activities can be planned and monitored with confidence. Other changes depend on how people, organisations and wider conditions respond and may only become clear through experience.

Where the main dependencies are reasonably well understood, plans and change logic can provide useful structure. Where patterns are more emergent, the task may be to create conditions, notice what is developing and adapt as experience accumulates. Planning is therefore treated as a working hypothesis rather than a finished prediction, with monitoring, evaluation and reflection helping people decide whether to stay the course, adjust implementation or reconsider strategy.

A six-step cycle

At the practical centre of the guide is a six-step cycle that can be revisited as the work develops. The steps offer questions to support discussion, reflection and review in the reader's own setting.

1. Prepare to work with others.

Clarify what is prompting the work, what is fixed or open, and what assumptions, authority and resources shape the starting position.

2. Widen participation and shape the work together.

Consider whose knowledge, interests, rights and responsibilities need to shape the work, and what people can genuinely influence.

3. Develop or clarify the direction.

Clarify what the initiative is trying to achieve, how current choices may contribute to change, and which assumptions or alternatives need attention.

4. Frame the questions and criteria that matter.

Identify what people need to understand, judge and decide, and what values or standards will shape those judgements.

5. Choose evidence and learning routines that fit the work.

Select evidence that fits the questions, bring different forms of knowledge into the inquiry, and create opportunities for collective interpretation.

6. Use learning for decisions, adaptation and continuity.

Connect learning with the people able to act on it, make room to change course where needed, and carry forward enough reasoning for later participants.

The cycle is not intended to be followed mechanically or only once. Existing initiatives can enter wherever the need is most apparent, people may move back and forth between steps, and the cycle itself can be revisited as evidence, participation, circumstances or priorities change.

Conditions for learning and adaptation

A cycle alone is not enough. Participation concerns influence as well as inclusion. Who frames the issue, whose knowledge shapes questions and criteria, who interprets evidence and where authority sits all affect what learning can do. Evaluation also involves judgement. Making criteria visible before as well as after action can help people understand what important conclusions rest on and where differences remain.

Organisational and governance arrangements matter too. Funding cycles, reporting requirements, mandates, incentives and decision rights may support learning or constrain it. Where people understand what needs to change but lack the authority or resources to respond, learning may need to travel upstream to funders, organisations or governance bodies.

Continuity matters as staff leave, partnerships change and funding periods end. Later participants may need more than plans, indicators and findings. They may also need the assumptions, significant decisions, unresolved questions and context that explain how the current position was reached. Learning may also need to travel across places and levels without losing the context that gives it meaning.

Digital systems and AI add another test of connected practice. Rapid synthesis can be useful, but it is not the same as collective sense-making, and important judgements still need enough context and reasoning to remain open to question.

What this guide contributes

This guide draws on established ideas from strategic planning, participatory monitoring and evaluation, adaptive management, social learning, systems thinking, action research, complexity-aware evaluation and organisational learning. It is intended as a practical orientation rather than a new framework for planning, monitoring, evaluation and learning or a comprehensive methods manual.

Its contribution is to frame connection itself as something that needs attention. Planning, monitoring, evaluation and learning may all be present, yet still fail to provide the shared reasoning needed for learning and adaptation. The practical issue is therefore not only whether the expected elements are in place, but whether they remain connected with one another, with implementation, and with the questions, conversations and decisions shaping the work.

The guide gives particular attention to using criteria before as well as after action, to following learning upstream to funding and governance arrangements, and to carrying reasoning forward across staff, programme and funding transitions. It also recognises that people often inherit existing arrangements rather than design them from the beginning. Starting again is rarely necessary. The more practical task is often to identify where connections have weakened and what would help restore them.

The central question running through the guide is:

What needs to stay connected here if people are to learn from experience and use that learning while there is still time to act?

The answer will change as the work develops. Keeping that question alive may be more useful than trying to settle all the connections at the beginning.



How to use this guide

How the guide is organised

This guide can be read from beginning to end, but it is also designed to be used selectively. Readers may come to it while shaping a new initiative, steering work through changing conditions, managing or coordinating work on the ground, strengthening existing planning or monitoring, evaluation and learning (MEL) arrangements, reviewing progress and contribution, or supporting others as an evaluator, facilitator or adviser.

It can also be used collectively. A programme team, partnership, governance group or others involved in the work may find it useful to work through particular chapters or steps together, using the questions and prompts to compare perspectives, make assumptions visible and decide where attention is needed. The guide has three main parts.

Part 1: Why connection matters looks at why planning, monitoring, evaluation and learning can become separated from the work they are intended to support. It considers complexity, accountability, shared reasoning and the role of strategic planning in providing direction while remaining open to learning.

Part 2: Keeping the work connected is the practical core of the guide. Chapter 5 sets out a six-step cycle for working from preparation and participation through direction and change logic, questions and criteria, evidence and collective sense-making, and the decisions and continuity that follow. The cycle can be entered at different points and revisited as the work develops.

Part 3: Conditions for credible learning and adaptation looks across the cycle at some of the conditions that affect whether these connections can be maintained in practice. It considers relationships, ethics, power and different forms of knowledge; organisational conditions for learning and adaptation; and changes in the evidence landscape associated with digital systems and AI. The final chapter draws together what these arguments mean for practice.

Suggested entry points

If you are **shaping or helping to shape a new initiative**, begin with Part 1, especially Chapter 4 on direction that stays open to learning, then work through the six-step cycle in Chapter 5. Steps 1 and 2 are particularly important before the initial framing becomes too settled.

If you are **steering an initiative through changing conditions**, Chapters 3 and 4 can help you look at whether the main connections are still holding. Chapter 5 then provides places to revisit participation, assumptions, questions, evidence and decision-making as circumstances change.

If you are **managing or coordinating work on the ground**, Chapters 2 and 3 can help connect day-to-day activity with wider direction and learning. Chapter 5 provides places to revisit priorities, practical constraints, evidence and decisions as the work develops.

If you are **working as a facilitator**, Steps 2 and 5 focus on participation, how ideas move beyond the immediate group, and how people make sense of evidence together. Chapter 6 goes further into relationships, disagreement and credible inquiry.

If you are **leading a partnership or community-based initiative**, Steps 1 and 2 may be particularly useful for examining starting assumptions, participation and influence. Chapter 6 provides a deeper discussion of representation, knowledge and ethical responsibility.

If you are **leading a technical or specialist workstream**, Chapters 2 and 4 can help connect technical analysis with wider strategy and changing conditions. Steps 3–5 help connect change logic, questions and evidence with the conversations and decisions they need to inform.

If you are **working as an evaluator or MEL adviser**, Steps 4 and 5 provide a useful entry into questions, criteria, evidence and collective sense-making, while Step 6 connects what is learned with decisions and adaptation.

If you have **funding, governance or organisational responsibilities**, Chapter 7 looks at how reporting requirements, mandates, resources, organisational culture and continuity affect whether learning can influence action.

The Learning for Sustainability website provides the wider resource base for this guide. The Monitoring, evaluation and learning hub brings together related material on evaluation, learning, accountability and adaptive practice. Other relevant resources cover planning, Theory of Change, systems thinking, facilitation, participation, indicators and adaptive management. The companion guide on [developing and using indicators in place-based and multi-actor settings](#) provides more detailed support on indicator selection and use.

A short note on PMEL

PMEL commonly stands for planning, monitoring, evaluation and learning. In this guide, these are treated as four activities that need to connect across the work. Different people may hold particular responsibilities for each, but their value depends on how well they connect with one another and with the decisions shaping the work. Planning is kept explicit because choices about purpose, participation, assumptions and decision points shape what monitoring, evaluation and learning can later do.

Related traditions use terms such as monitoring, evaluation and learning (MEL); monitoring, evaluation, research and learning (MERL); and monitoring, evaluation, reporting and improvement (MERI). PME can mean planning, monitoring and evaluation, or participatory monitoring and evaluation, depending on the context.

This emphasis on connecting planning with monitoring, evaluation and learning sits close to traditions of adaptive management, adaptive planning and continuous improvement, in which evidence and reflection inform both ongoing action and the revision of plans.

PART 1

Why connection matters

Multi-actor initiatives have to hold together purpose, relationships, action, evidence and decisions while circumstances continue to change. This part looks at why those connections are difficult to maintain, what complexity adds to the task, and how strategic planning can provide direction while remaining open to learning and adaptation.





1. When the pieces don't connect

Plans, evidence, reporting, reflection and decision-making may all be present without forming a useful learning process. This chapter starts with that practical problem and introduces the idea that runs through the guide: maintaining enough shared reasoning across the work for people to learn from experience and use that learning to shape what happens next.

Across fields as varied as climate adaptation, biodiversity, food and water systems, public health and community development, a recurring problem is that the different parts of a response do not join up well enough. Direction may remain broad, organisations and policy areas may work through separate systems, and monitoring can become better at recording activity than at helping people judge whether intended changes are occurring. The IPBES Nexus Assessment highlights the consequences of fragmented responses across closely connected biodiversity, water, food, health and climate issues (IPBES, 2024). A comparative review of national climate adaptation monitoring, evaluation and learning systems across nine countries found a related pattern: monitoring and reporting were generally more established than evaluation and learning (Njuguna et al., 2024).

These are not only problems of large national systems or environmental programmes. Similar difficulties appear in community-based initiatives, place-based programmes, landscape partnerships, adaptation initiatives and other multi-actor efforts around the world. Direction may not be clear enough to guide later learning. Technical work, engagement, monitoring and governance can proceed along separate tracks. Evidence may be gathered for reporting without enough opportunity to interpret what it means or use it in decisions.

Many people involved in these initiatives will recognise some version of this. There may already be a strategy, indicators, reporting requirements, review meetings and periodic evaluations. People may be gathering considerable amounts of information. The harder question is whether these different parts of the work are helping those involved understand what is happening and decide what to do next.

A plan may have been prepared before partnerships were fully formed. Indicators may reflect what was measurable or required at the time. Reporting may follow funding cycles rather than the timing of important decisions. Review meetings can become absorbed in updates and coordination, leaving little room to ask what is being learned, whether assumptions are still holding, or whether anything needs to change.

When the work is distributed

In multi-actor work, these connections are harder to maintain because the work itself is distributed. Different people, sectors and organisations hold different knowledge, responsibilities, resources and authority. Technical analysis, community engagement, implementation, governance and monitoring may all be moving at once, often at different speeds and in different places.

A working group can develop a strong shared understanding while the organisations or communities around it have not travelled through the same learning. Technical work can answer questions before the people making decisions are ready to ask them. Engagement can surface concerns after important choices have already been made. Monitoring can produce useful signals without there being a good place to consider what they mean.

The issue is therefore partly one of timing as well as coordination. Different strands of work do not need to move together continuously, but they need to reconnect at points where what is being learned in one part can still influence what happens in another. The challenge is to keep enough connection across the work for people to learn together and for that learning to influence what happens next.

Keeping shared reasoning visible

One way I have come to think about this is as maintaining shared reasoning. I use the term in a fairly ordinary sense. It is the developing account people hold together about what they are trying to achieve, why they think particular choices may help, what they are noticing, what different forms of evidence and experience suggest, what they judge to matter, and what should happen next.

That account will always be incomplete. People begin from different positions and know different things. Circumstances change. Some assumptions hold up better than others. New people become involved and different concerns come into view. The practical value lies in keeping enough of the reasoning visible that it can be discussed, tested against experience and revised when necessary.

Planning, monitoring, evaluation and learning can provide much of the practical structure for doing this. The following chapters look at how those connections can be strengthened, including where people inherit plans and monitoring arrangements that were designed for earlier purposes or circumstances.

Shared reasoning also depends on the quality of the relationships around the work. People need enough trust and continuity to raise uncertainty, question assumptions, introduce different forms of knowledge and disagree about what the evidence means. Influence matters as well. People can contribute valuable knowledge while having little ability to shape the decisions that follow.

Rigour matters alongside those relationships. Collaborative learning still requires evidence and reasoning that are credible enough for the decisions being made. There can be tension here. Challenging a strongly held assumption or questioning weak evidence can place relationships under strain, while protecting relationships too carefully can make difficult evidence harder to discuss. Part of the work is finding ways to maintain both the quality of relationships and the quality of inquiry.

The challenge also extends over time. People, programmes and funding arrangements change while places, relationships and many consequences continue. Later chapters return to what this means for keeping learning and reasoning available beyond the people who were present when they were first developed.

These concerns are especially important where outcomes depend on several actors, circumstances are changing and learning needs to influence action while the work is underway. They arise in catchment and landscape initiatives, climate adaptation, community development, public health, regional planning and many other settings where organisations and communities work across boundaries over time.

Not every situation needs the same degree of attention. Where work is relatively contained, responsibilities are clear and the relationship between activities and results is well understood, conventional planning, routine monitoring and periodic evaluation may be quite sufficient. The need to work more deliberately with these connections grows as uncertainty, interdependence and distributed responsibility increase.

Where this approach comes from

The concern with these connections has run through my work since the 1990s. My doctoral research brought together questions of participation, information sharing, collaborative learning and adaptive management, and I presented the thesis as a linked body of online material that readers could explore in different ways. It was one of the foundations for the website that later grew into Learning for Sustainability (Allen, 2001).

That relationship between inquiry and sharing practical resources has continued. Over time, resources on systems thinking, participation, social learning, facilitation, adaptive management, strategic planning and evaluation have come to sit alongside one another on the website, because the practical problems they address rarely arrive neatly separated.

Different fields have approached these problems from different starting points. Participatory monitoring and evaluation and social learning have drawn attention to who frames questions, whose knowledge enters the work and how people make sense of experience together (Estrella & Gaventa, 1998; Cundill et al., 2012). Action research has emphasised inquiry through action and reflection (Apgar et al., 2017). Adaptive management has kept attention on feedback, assumptions and the need to adjust as conditions change (Holling, 1978). Systems thinking and systemic design have widened attention to relationships and interactions, to what is included or left outside the frame, and to the wider consequences of action (Midgley, 2023; van der Bijl-Brouwer & Malcolm, 2020). Evaluation brings attention to what matters, to whom, and how progress is judged. Transformation-focused evaluation connects these questions with learning and decisions that support the wellbeing of people and the wider environment (Buckton et al., 2025). Integrative research and implementation science have grappled with how evidence, context, uncertainty and different forms of knowledge can inform action (Bammer, 2013; Braithwaite et al., 2018).

These traditions have different histories and professional communities, but they often meet around similar practical questions. Work on actor-focused planning, monitoring and evaluation and on adaptive management illustrates some of these connections in practice (Van Ongevalle et al., 2014; Desai et al., 2018). I see them as connected in my own practice because each helps with a different aspect of the same recurring problem: how people work together under changing conditions, learn from what is happening and use that learning to make better decisions.

This guide looks at how planning, monitoring, evaluation and learning can be connected to help people work with some of those questions in place-based and multi-actor settings. It is not an attempt to combine the traditions into a new methodology.

The chapters that follow explore what some of this means in practice. The question running through them is a simple one:

What needs to stay connected here if people are to learn from experience and use that learning while there is still time to act?



2. Working with complexity, learning and accountability

Multi-actor initiatives have to deliver work, remain accountable and keep learning as conditions change. This chapter looks at how those purposes can pull in different directions, what systems and complexity add to the task, and why judgement and boundaries matter alongside evidence.

A programme can be meeting its milestones while people involved in implementation are becoming less confident that the strategy is right. A reporting system can show steady progress while important relationships are weakening or conditions around the work are changing. Equally, a group can be learning a great deal without being able to show clearly what has been achieved or how resources have been used.

These are familiar tensions in this kind of work. People need to manage delivery, learn from what is happening and remain accountable for decisions and resources. All three matter, but they do not always ask the same things of the work.

Different purposes, different pressures

Management needs information that helps people keep the work moving: whether activities are happening, resources are available and practical obstacles need attention. Learning depends on understanding whether assumptions are holding, what is changing or surprising, and whether the current approach still makes sense. Accountability requires a clear account of what was done, how resources were used, what changed and what can reasonably be claimed.

The same information can sometimes serve all three purposes, but the fit is rarely exact. A reporting indicator may satisfy a funder while telling local partners little about what is changing in practice. A reflective conversation may reveal something important about the strategy without producing a neat performance measure. A dashboard can show activities on track while missing signs that the plan itself needs another look.

The tension becomes sharper when reporting requirements become the main organising logic for monitoring and evaluation. What is required is usually clearer than what people need for learning, so the required information tends to be collected first. Over time, a system can become quite efficient at producing reports, while becoming less useful to people making decisions about the work.

Accountability is still necessary. The useful questions are who the work is accountable to, for what, and over what timeframe. Funders and governance groups may need assurance that commitments have been met. Communities and partners may have a stake in whether the work reflects their priorities and whether its consequences are acceptable. In long-term place-based work, decisions made within one programme can also shape what others inherit later.

All of these purposes involve judgement. People have to decide what counts as progress, which changes matter, how much confidence they need in the evidence and whether the current direction remains worthwhile. These judgements are made by programme teams, communities, partners, funders and governance groups as well as by evaluators, and these different groups may bring different values and criteria to them.

Working with structure and emergence

Not every part of a multi-actor initiative is equally uncertain. Some activities can be planned and managed quite precisely. Budgets can be tracked, meetings scheduled, restoration work completed and training delivered. Contracts and statutory requirements may set clear expectations.

Other changes depend more on how people, organisations and wider conditions respond. Relationships may strengthen or weaken. Practices may spread unevenly. Policy settings change. An intervention may interact with other initiatives already underway. Ecological responses may take longer than a funding period to become visible.

Both kinds of situation can exist within the same programme. This means the choice is not between structure and emergence. Different parts of the same initiative may call for different ways of working. Where what needs to happen and the main dependencies are reasonably well understood, plans and change logic can provide useful structure. Where patterns are more emergent, the task may be to create conditions, notice what is developing and adapt as experience accumulates. The same initiative may need both at once.

A systems perspective helps people look beyond individual activities to relationships, boundaries and dependencies. It can show how one part of the work affects another, where important influences sit outside the immediate programme, and what may have been left out of the original framing.

A complexity-aware stance adds a different caution. Some patterns cannot be known confidently in advance because they develop through interaction. New possibilities and constraints emerge as people act. Planning still matters, but some of what matters most only becomes visible through experience.

The practical question is where clear planning and routine monitoring are useful, and where people need to keep observing, comparing interpretations and reconsidering what they thought would happen.

This also changes how adaptation is understood. Sometimes learning leads to an adjustment in an activity or timetable. At other times it may challenge an assumption, a relationship on which the work depends, the way responsibilities are arranged, or part of the strategy itself. Occasionally it may suggest that the original framing of the problem needs another look.

That kind of adaptation requires something to return to. Plans, theories of change, criteria, systems maps or other shared accounts can help because they make enough of the current reasoning visible to be questioned. Their value lies partly in giving people something against which experience can register.

Looking beyond the programme

The formal boundaries of an initiative help clarify mandate and responsibility, but they do not necessarily mark the limits of what needs to be understood.

Progress may depend on other organisations, parallel initiatives, policy changes, economic conditions, institutional incentives or changes in the wider environment. Effects can also appear somewhere other than where attention was originally focused. An improvement for one group or place may shift costs or risks elsewhere.

Looking beyond the programme boundary helps distinguish between what the initiative can reasonably influence, what it contributes to alongside others, and what it needs to understand because it shapes the conditions in which the work is taking place.

Sometimes this wider view needs to include the organisations that fund, commission or govern the work. Their requirements can shape what is possible on the ground. A programme may be asked to work adaptively while its funding arrangement rewards adherence to a fixed plan. Local partners may be encouraged to collaborate while important decisions remain elsewhere.

These arrangements are not always simply part of the context surrounding an initiative. Where funding rules, organisational incentives, reporting requirements, policy settings or governance decisions materially shape what people are able to do, they form part of the system through which change is being produced. They may therefore need to be included in the inquiry, even where the initiative has little direct authority to change them.

Some affected interests and rights are also difficult to represent directly. People elsewhere, future generations and wider living systems may still be affected by present choices, while some groups may hold rights or responsibilities that need to be recognised in how the inquiry is framed. Chapter 6 returns more fully to how such interests and different forms of knowledge can be brought into inquiry and judgement.

Scale matters too. A national programme may need comparable information across regions, while people working in a particular place need evidence that makes sense in that context. A community or catchment initiative may see changes that are difficult to capture in national measures. Part of the challenge is enabling learning to travel between levels without stripping away the context that gives it meaning.

Rigour under changing conditions

Evidence in real initiatives is rarely complete. Data may be uneven, collected for other purposes or arrive after circumstances have already changed. Several plausible explanations may fit what people are seeing.

Rigour in this setting begins with fit. Methods need to suit the questions, important claims may need more than one source of evidence, and interpretation should be distinguishable from observation. Alternative explanations deserve attention where they could materially affect a decision. In collaborative work, rigour also depends on the conditions around the inquiry: whether roles are clear, difficult evidence can be raised, different interpretations can be examined, and important judgements remain open to question.

Judgement also needs to remain visible. What criteria are being used? Whose values and responsibilities sit behind them? How confident do people need to be before acting? What uncertainty can reasonably be carried, and what uncertainty requires further inquiry?

This does not require certainty. It requires reasoning that is transparent and proportionate to the decision at hand: enough for people to see what a judgement rests on, where uncertainty remains, and what might cause them to think differently later.

That same visibility can strengthen accountability. People are better able to understand important decisions when they can see the evidence and reasoning behind them, including where circumstances changed or assumptions proved wrong. It also gives later learning something to return to rather than leaving only the final indicator or report.



3. Towards a connected practice

Planning, monitoring, evaluation and learning are most useful when they inform one another and connect with the conversations and decisions shaping the work. These connections can be designed in early, but they can also be strengthened as an initiative develops.

Many initiatives already have plans, indicators, reporting arrangements and review processes. The important question is what happens next when those pieces are present but do not connect particularly well.

People often inherit systems developed under earlier circumstances. A plan may have been prepared before relationships were fully formed. Indicators may have been selected mainly for reporting. Evaluation may have been commissioned separately from implementation. Starting again is rarely necessary. More often, the useful task is to see where the connections can be strengthened.

Reconnecting the pieces

Planning, monitoring, evaluation and learning can provide much of the practical structure for the shared reasoning introduced in Chapter 1. Their value comes partly from the way they inform one another.

A plan gives people something explicit to work from and return to. Monitoring helps them notice patterns, progress and warning signs. Evaluation can provide more deliberate opportunities to investigate what is happening and make judgements about its significance. Learning develops as evidence and experience are brought back into the conversations where people consider what should happen next.

In practice, these activities overlap. Monitoring may raise questions that need deeper inquiry. Evaluation can contribute while work is underway rather than only at formal review points. What people learn may alter priorities, assumptions or later monitoring. Planning continues as understanding develops.

In inherited systems, this may involve revisiting what sits behind existing indicators and asking what they are actually helping people notice. Assumptions that have remained implicit can be made visible enough to discuss. Review processes can be connected more closely with choices that are coming up. Existing evidence can be brought together with what people involved in the work are seeing and experiencing.

Monitoring is often particularly useful as a source of signals rather than conclusions. A change in an indicator, or something noticed through practice, may prompt closer inquiry into what is happening, whether expectations were reasonable and what response is warranted.

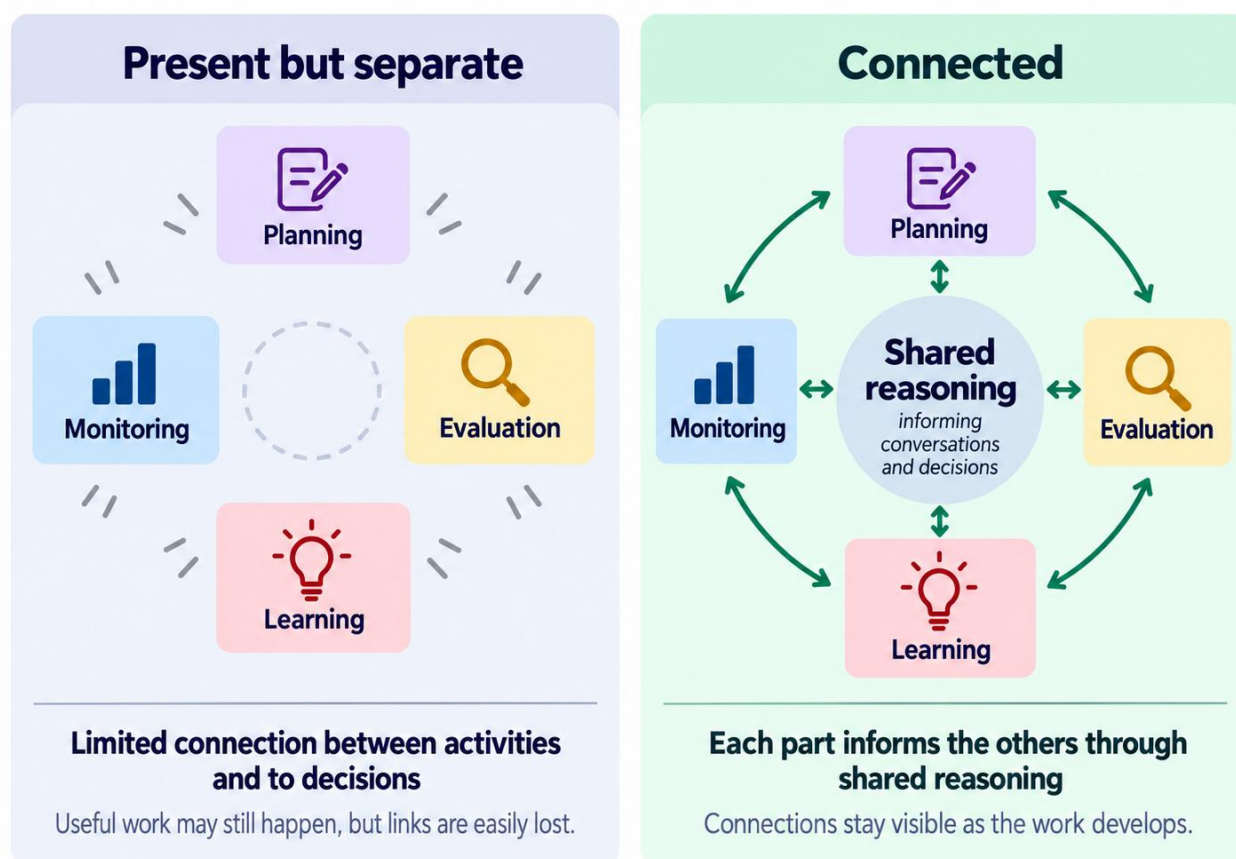


Figure 3.1. Planning, monitoring, evaluation and learning are most useful when they inform one another through shared reasoning and connect with the conversations and decisions shaping the work.

The figure shows the difference between planning, monitoring, evaluation and learning sitting alongside one another and these activities working as a connected practice. When the links remain weak, useful learning can still be produced, but it is less likely to travel into shared reasoning, decisions and adaptation.

Learning needs somewhere to go

Evidence becomes useful for learning and adaptation through the conversations in which people consider what it means for the work. Those conversations also need some connection with decisions. Sometimes the people involved can act themselves; at other times what they are learning needs a route to another part of an organisation, partnership or governance system where authority sits. Existing planning, review and governance processes can provide useful points of connection when they create room to reconsider assumptions and choices rather than simply receive updates.

Much of this is facilitation in a wider sense than running meetings. Someone, or some group, often needs to notice when streams of work are drifting apart, keep important questions in view, bring knowledge into the conversation at useful moments, and make room for reflection before decisions close things down. Part of this is about timing: noticing when different strands need to come together, when people need more time to work something through, and when a decision or transition creates a useful point for reflection.

Maintaining these connections needs deliberate attention. What matters is that there is enough overview and mandate to notice when important links are weakening and help restore them.

Keeping the connections alive

Connections that work early in an initiative do not necessarily remain strong. People leave, new partners join, responsibilities shift and different strands of work develop their own routines. New concerns emerge while earlier questions or assumptions can gradually disappear from view.

Important questions and assumptions need to remain visible, with routes from evidence to interpretation and from learning to decisions. Enough of the reasoning behind important choices also needs to remain accessible to be revisited as circumstances change.

This becomes particularly important across programme and funding transitions. Programmes end, staff move on and collaborative groups are re-formed, while places, relationships and many of the consequences of earlier decisions continue.

People who come later may inherit plans, indicators and reports without the reasoning behind them. Keeping enough of that reasoning accessible helps later participants understand what has already been learned, what remained uncertain and what may need to be reconsidered. Step 6 returns to this more fully.

A connected practice develops through this continuing work of linking evidence, experience, reasoning and decisions, and keeping enough of those links alive as people and circumstances change.

The next chapter turns to one of the main anchors for that work: having enough shared direction for people to act together, while keeping that direction open to learning and revision.



4. Direction that stays open to learning

Multi-actor work needs enough direction for people to act together, while retaining room to reconsider assumptions as experience develops. This chapter looks at planning as a continuing part of the learning process, connecting purpose, strategy, boundaries and possible pathways with later evidence and adaptation.

An initiative can have a compelling vision and still be unclear about what it is actually trying to influence. People may agree that a catchment should be healthier, a community more resilient or a service more equitable, while holding different ideas about what should change first, who needs to act, and what role the initiative itself should play.

Some direction is needed if people are to coordinate their efforts and later make sense of what happens. Without it, monitoring has little to test against and learning can become a collection of observations without a clear connection to strategy.

At the same time, direction in place-based and multi-actor work can rarely be settled once and for all. Conditions change, relationships develop and new evidence appears. Planning therefore remains part of the shared reasoning of the initiative rather than simply something completed before implementation begins.

Vision, purpose and strategic choices

Most initiatives begin with some form of vision or aspiration. This might describe a desired future for a place, community, system, sector or set of relationships. It helps people see why working together might be worthwhile and keeps attention on change beyond immediate activities.

A shared aspiration still leaves practical questions about purpose. Why does this particular initiative exist? What part of the wider situation is it trying to influence? What can it reasonably take responsibility for, and what depends on others?

These questions matter because broad agreement can conceal quite different expectations. Organisations may support the same vision while seeing the initiative's role differently. One may see its main purpose as changing policy, another as strengthening local capability, and another as improving conditions on the ground.

Working boundaries are part of this strategic judgement. They help people decide what will receive attention, what sits beyond the immediate scope, and where progress depends on other organisations, communities or wider social, economic and ecological conditions. Those boundaries are provisional choices. As understanding develops, they may need to be revisited.

Strategy gives more shape to this direction. It involves choices about focus, sequencing and possible pathways of change. What deserves attention first? Which relationships or capabilities need strengthening? Which decisions could unlock later change? What will the initiative deliberately leave to others or defer?

Such choices involve values as well as evidence. Priorities and trade-offs reflect judgements about what matters, whose rights and aspirations carry weight, what risks are acceptable, and what deserves attention now rather than later. Keeping some of this reasoning visible gives later monitoring and evaluation something meaningful to work with.

The changes an initiative is trying to support may also take different forms. Some may be biophysical, economic or service outcomes, while others involve changes in awareness, capability, relationships, practices, coordination or institutional arrangements. In multi-actor work, strengthening the ability of people and organisations to work together may itself be part of the intended change, particularly where later outcomes depend on that collective capacity.

Developing strategic direction

Strategic direction does not usually follow automatically from agreeing a vision. People still need to decide where attention and effort are most likely to be useful. This may involve looking at the wider system, identifying important constraints and opportunities, considering where the initiative has influence, and developing several possible ways forward before settling on priorities.

In collaborative settings, this is partly an analytical task and partly a process of judgement. Different participants may see different opportunities, risks and points of influence. Possible courses of action can be considered in terms of their likely contribution to the desired direction, feasibility, dependencies, consequences for different groups, and what other action they may enable or constrain.

The aim is not necessarily to identify a single optimal strategy. It is to make deliberate choices about where to put effort given what is currently understood, while recognising what remains uncertain. Some choices may need to be made now; others can remain open while further experience or evidence develops.

Recording why particular priorities were chosen, what alternatives were considered and what assumptions shaped the decision gives later monitoring, evaluation and learning something meaningful to return to.

Planning as a working hypothesis

In relatively stable settings, a plan may sometimes function rather like a route map. Where circumstances are more uncertain, I find it more useful to think of a strategic plan as a working hypothesis.

It says, in effect: given what we understand now, this is the direction we think is worth pursuing, this is how we think change may happen, and these are the choices we think deserve attention.

That framing creates a useful relationship between planning and later experience. Monitoring can show whether expected signals of progress are appearing. Evaluation can examine assumptions or explore why change is unfolding differently from what was expected. Reflection and review provide opportunities to ask whether the strategy still fits the situation.

Different planning traditions contribute to this. Strategic planning helps clarify purpose and choices, while futures and adaptive pathways approaches can help people explore alternative directions and keep later choices open where uncertainty matters.

Adaptation does not mean responding to every new piece of information. Some changes take time to become visible, early signals can be ambiguous, and pressure to alter direction can arise for reasons that have little to do with learning. Judgement is needed about when to stay the course, when to adjust implementation, and when the underlying strategy needs another look.

Theory of Change, scenario planning and adaptive pathways can all help make assumptions, dependencies and possible alternatives more visible. Their value lies less in the particular approach than in making enough of the current reasoning visible to test against experience and reconsider it as understanding develops. Step 3 returns to this practical work.

Working across levels and timeframes

Place-based and multi-actor initiatives rarely work to a single plan or clock. A high-level strategy may sit alongside programme plans, partner priorities, community aspirations, funding agreements and statutory requirements. These can point in broadly the same direction while operating to quite different timeframes.

A funder may work to a three-year cycle. An agency may be shaped by annual budgets or statutory planning periods. Community aspirations may extend across generations, while ecological and social changes unfold at still different speeds. The initiative has to work across these different rhythms.

This matters for learning as well as planning. A programme may need to account for what it has achieved within a funding period even though the outcomes it hopes to contribute to will take much longer. Short-term evidence can still be useful, but people need to be clear about whether they are seeing an activity completed, an early signal of change, or something that can reasonably be treated as an outcome.

Plans at different levels can also drift apart. A workstream may meet its own targets while contributing little to the wider strategy. A local initiative may learn something important that has no route into a regional or national decision. A strategic commitment may remain on paper because responsibility for acting on it has never been clear.

Keeping some connection across these levels helps people see how their immediate choices relate to the wider direction, and where action or authority lies elsewhere.

Planning is also where trade-offs become visible. No initiative can pursue every worthwhile possibility at once. Decisions about scope, priorities, partnerships, timing and methods shape what can later be monitored, evaluated and learned. Some of these choices will need to be revisited as circumstances change.

The aim is to have enough direction to act while leaving room to learn. Shared reasoning needs something explicit to return to when experience challenges what people expected. Planning provides that reference point when purpose, strategic choices, assumptions and uncertainties remain visible enough to discuss.



Some questions to work with

- What longer-term vision or desired future is the initiative contributing towards, and what is its particular role within that?
 - Which strategic choices about focus, scope and sequencing have been made, and what assumptions sit behind them?
 - What can the initiative reasonably influence, what depends on others, and where might its working boundaries need reconsideration?
 - Which assumptions, dependencies or changing conditions most need to be watched as the work develops?
 - What important differences in planning level or timeframe could affect how progress is interpreted?
 - What would make us reconsider the current direction, and what might instead suggest that it needs more time?
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PART 2

Keeping the work connected

The practical challenge is to keep intent, participation, evidence, judgement and decision-making connected as the work develops. This part offers a six-step cycle for working through those connections, while recognising that people may enter at different points, move back and forth between steps, and revisit the cycle as circumstances and understanding change.





5. A six-step cycle for keeping the work connected

The six steps provide a practical way of moving between preparation and participation, direction and change logic, questions and criteria, evidence and collective sense-making, and the decisions that follow. They offer enough structure to support shared reasoning without assuming that the work unfolds in a tidy sequence.

At the centre of the cycle is coordinated action and learning: connecting what people are trying to achieve with what is happening in practice and what should happen next. The steps are not a separate stage before or after delivery. Much of the work they describe happens alongside implementation, in team meetings, partner conversations, planning sessions and reviews.

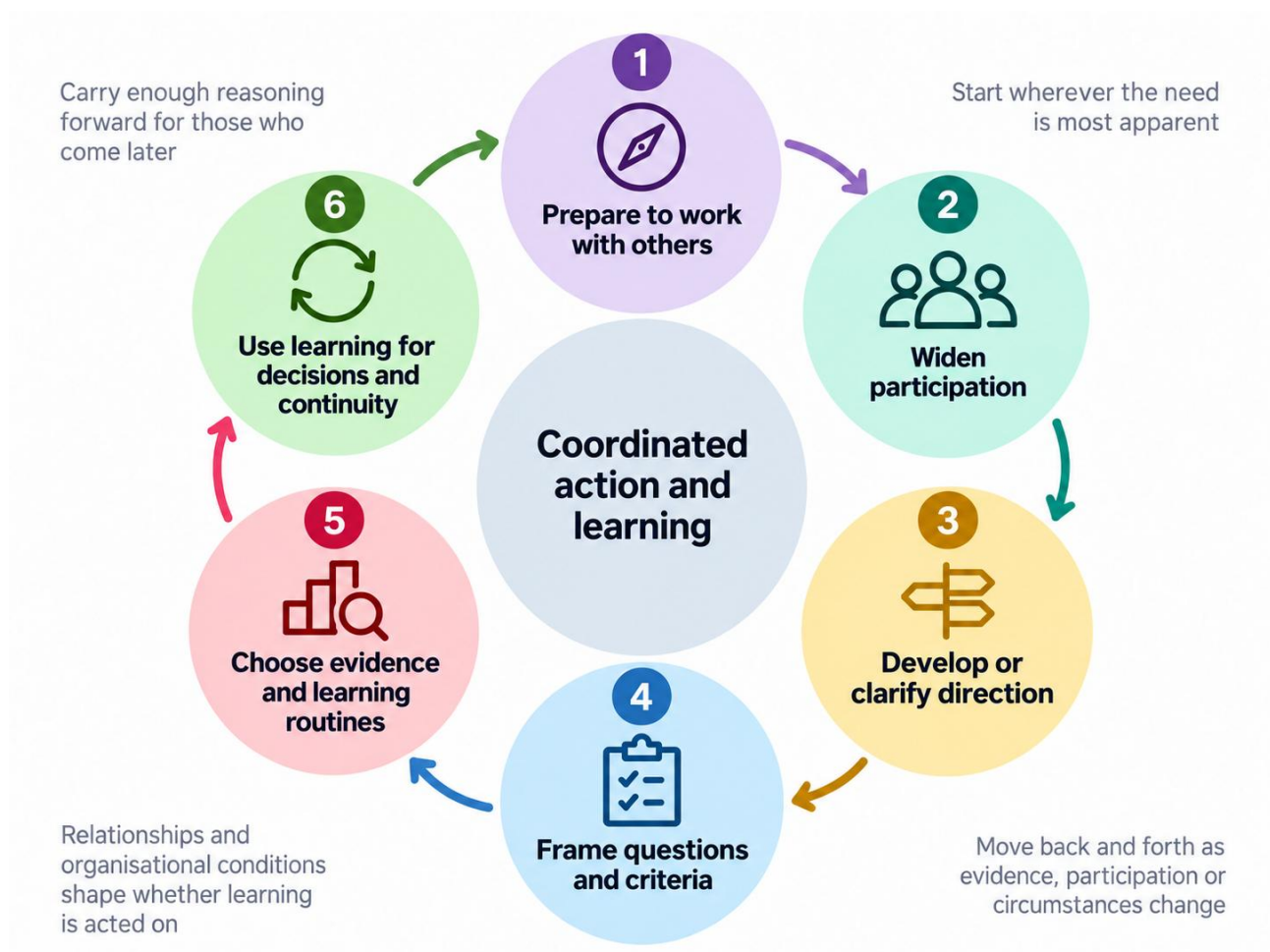


Figure 5.1. The six-step cycle helps connect planning, monitoring, evaluation and learning with action and decision-making as the work develops.

The cycle can be used when work is beginning, when an existing approach needs strengthening, or when changing circumstances bring an earlier question back into view. There is some logic to the order shown, particularly at the outset, but people can enter wherever the immediate need is most apparent, move back and forth as understanding develops, and revisit the cycle as the work itself develops.

Using the cycle in practice

The cycle is not intended to replace programme management, strategic planning, facilitation or evaluation. Rather, it provides a way of keeping these different strands connected so that what is being learned can influence how the work is carried forward. Different people may take the lead at different points, but the value of the cycle lies in helping them see how their work connects with the wider initiative.

The six steps also operate at different levels. Some questions concern immediate delivery, coordination and practical constraints; others concern participation, assumptions, evidence or strategic direction. Moving between these levels helps people respond to what is happening now without losing sight of the wider purpose and longer-term change they are trying to support.

The steps will not need equal attention at every stage. At one point the main issue may be a practical constraint on delivery; at another it may be uncertainty about the direction, weak participation, missing evidence or a decision that cannot be made at the level where the issue has emerged. The cycle can therefore also be used to notice where a connection has weakened and where attention is most needed.

Nor does responsibility for keeping these connections alive sit with one person or professional role. Programme teams, community partners, facilitators, technical specialists, evaluators, advisers and governance bodies may each hold different parts of the picture. The practical task is to bring those perspectives together at useful moments, without assuming that everyone needs to be involved in everything, while being clear about who is helping to hold the connections at any given time.

Step 1

Prepare to work with others

What is prompting the work, what are we bringing to it, what is fixed or open, and what do we need to understand and discuss with others before going wider?

Someone usually has to start. An organisation, community group, agency or a few concerned people see something they want to change, protect or move towards. They will already have some understanding of the situation and perhaps a view about what should happen next. They may also bring relationships, responsibilities, resources and authority that shape what is possible.

Those starting positions matter. They influence how the issue is framed, who first comes into view, and which possibilities seem realistic. Preparation provides an opportunity to look more closely at that starting point before the emerging direction becomes too settled.

Understand the starting position

A useful first question is what is prompting action now. There may be a long-standing concern, a new opportunity, an emerging risk, a policy commitment or a funding decision. Those involved may already have an idea of what the problem is and what needs to change.

It helps to make enough of this visible to discuss. What are people hoping will be different? Why does the issue look important from where they are standing? What assumptions are shaping the way it has been described? What previous experience, evidence or relationships are informing that view?

History matters too. Communities, organisations or partners may already have been consulted, researched or invited into earlier initiatives. It is worth asking what they have previously been asked to contribute, what happened as a result, and what expectations or frustrations those experiences may have created. Starting well sometimes depends as much on understanding what has already happened as on designing what comes next.

Be clear about what is fixed

Those initiating the work rarely have complete freedom to shape it. Statutory responsibilities, funding conditions, contracts, organisational policy, previous commitments and available resources may already place limits around what can happen. Accountability and reporting requirements may also be in place.

Some constraints really are fixed for the purposes of the initiative. Others may be less settled than they first appear. An established organisational preference can easily be presented as a requirement. An earlier decision may still be open to reconsideration. A reporting framework may be mandatory while leaving considerable room around how learning is organised and how later choices are made.

This distinction becomes important as participation widens. People need a reasonable sense of where their influence can reach. Asking for views on choices that have effectively already been made can quickly undermine trust.

Questions about what is fixed or open also bring authority into view. Those convening the work may be able to shape some decisions but not others. Responsibility for funding, policy, governance or implementation may sit elsewhere. Within an organisation, different people may also have different assumptions about what the process is for and how far they are prepared to respond to what emerges.

This is not a reason to wait until everything is resolved before talking with others, but it does help to be clearer about the starting conditions and about where connections to other decision-makers may be needed.

Look far enough beyond the initial frame

Every starting position draws boundaries. It brings some relationships, concerns and possibilities into view while leaving others less visible.

A systems perspective can help people check those boundaries without requiring a comprehensive analysis. What sits outside the initial framing but may strongly influence what happens? What other initiatives or decisions are already in play? Who may experience the effects of the choices being considered? What social, cultural, economic or environmental relationships need to remain in view?

The wider picture may also include funding conditions, organisational incentives, policy settings, reporting expectations or governance arrangements that could enable or constrain what the initiative is trying to achieve.

The initial picture will almost certainly be partial. Early conversations with people who understand the situation differently can help test it. They may reveal histories or dependencies that were not visible, challenge assumptions about what the problem is, or identify people whose knowledge and interests need to be brought in earlier.

Existing monitoring, evaluation and reporting requirements are also part of this starting picture. Funders or governing bodies may have legitimate accountability needs. Managers may need information to support implementation. Those initiating the work may want to know whether their assumptions are sound or whether circumstances are changing. These requirements matter, but they are unlikely to define the whole learning agenda. Other purposes and questions will emerge as participation widens.

Make room for the work of connecting

Preparation also includes thinking about what the process itself will require. Keeping the work connected depends on more than arranging meetings and collecting information. Someone may need to keep different strands of work connected, bring emerging evidence back into discussion, maintain useful records, convene reflection and help learning travel between participants and decision-makers.

If those functions matter, they need some recognition in roles, time and resources. Otherwise they can become invisible work that depends on whoever happens to pick it up alongside everything else.

This does not necessarily require a dedicated role. The work may be shared across a programme lead, facilitator, evaluator, coordinator or small group. What matters at this stage is being explicit about who will help keep these connections alive as the work develops.

Prepare for a conversation, not a finished plan

The purpose of preparation is to be better placed to work with others, not to settle the situation before they arrive.

There is no sharp boundary between preparation and participation. Early discussions may already have changed the framing, identified people who need to be involved, or shown that something thought to be fixed is more open than expected. Step 2 widens the reach of that conversation and the influence that a broader group can have.

Preparation is also something people may need to return to. New partners join, mandates change, funding arrangements shift, and experience may show that the original framing or constraints need another look. Each return provides an opportunity to reconsider what the next phase of the work requires and what needs to remain visible from what has already been learned.



Some questions to work with

- What is prompting action now, and what are we hoping might be different?
 - What assumptions, previous choices and earlier experiences are already shaping how the situation has been framed?
 - What is genuinely fixed, what remains open, and what may only appear to be fixed?
 - What authority, resources and relationships do we bring, and where will action depend on others?
 - What wider context, organisational or funding arrangements, existing activity or missing perspectives could materially shape what is possible?
 - What will be needed to keep participation, coordination, reflection and learning connected as the work develops?
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Who needs to be involved or represented, how can they influence the work, and how will we work together to shape its direction?

Bringing more people into the conversation changes how the situation can be understood. Different people may care about different things, hold different knowledge of what has happened before, and see different possibilities or risks in what is being proposed.

If participation is to shape the work, there needs to be room for those differences to influence the emerging direction. Not everyone needs to participate in the same way or at every point. Some people will be directly affected by what happens. Others hold knowledge, responsibilities, relationships, resources or decision-making authority that matter. Some will eventually need to put decisions into practice. The relevant mix can also change as the work develops and new questions emerge.

Who needs to be involved or represented?

The people who are easiest to identify are not necessarily all those who matter. Existing organisational relationships tend to bring some participants quickly into view. Others may have less formal authority, less time or fewer connections with established processes, even where the consequences for them are substantial.

It is therefore useful to ask whose knowledge, interests and experience are needed for the situation to be understood well enough. This includes those likely to benefit from what is proposed and those who may carry costs, risks or unintended consequences.

Some interests cannot simply be represented by inviting another person into the room. Future generations and the wider living systems affected by present choices are obvious examples. Their interests still need to enter discussion and judgement in some defensible way. Chapter 6 returns more fully to questions of representation, knowledge and responsibility.

Not everyone who needs to be involved enters the work on the same basis. In some settings, Indigenous peoples hold rights, responsibilities and forms of authority that cannot adequately be understood simply as stakeholder interests or as perspectives to be represented within a process convened by others. Participation arrangements therefore need to distinguish between inviting people to contribute to a process and recognising authority that already exists.

Representation itself needs care. A participant from an organisation, profession or community does not automatically speak for everyone associated with it. Nor will those with the time, confidence or resources to take part necessarily reflect the range of interests that matter. Perfect representation will rarely be possible. A more useful discipline is to keep asking what may be missing, why it is missing, and whether that absence matters for the choices being made.

Participation is also about influence

The distinction between what is fixed and what remains open carries directly from Step 1. As participation widens, people should have a reasonable sense of what they can genuinely shape. Is the framing of the situation still open? Can the proposed direction change? Will participants help decide what counts as worthwhile progress? Can they influence implementation choices, or do some decisions sit elsewhere?

There is no single appropriate level of influence for every participant or every decision. Different people may reasonably be involved in different ways. What matters is that the relationship between participation and decision-making is sufficiently visible for people to understand what they are contributing to and what will happen with that contribution.

Where important decisions sit elsewhere, that connection needs to be made explicit. The relevant decision-makers may need to be involved directly, or there may need to be an agreed route through which the group's learning and recommendations can reach them.

Let ideas travel beyond the room

The people taking part directly in the process are rarely the whole social system around the work.

Participants may also be connected to organisations, communities, professional networks, governance bodies or other groups that need time to understand and respond to what is emerging. A small working group can move quickly towards a shared understanding while the people around it have had little opportunity to consider the same issues.

This makes the time between meetings part of the process rather than simply a gap in it. Emerging ideas may need to travel outwards, be discussed or tested with others, and return changed. Something that appeared settled in the room may prove less settled once participants reconnect with those they work with or represent.

Pace is therefore part of how this kind of work is designed. Moving more slowly at some points can give people time to test ideas, talk with others, reconsider their own position and work out what an emerging direction would mean in practice.

Much of this movement happens informally. Conversations between meetings, within organisations and across existing relationships are often part of how people test emerging ideas, build understanding and decide what they are prepared to support. These interactions may be less visible than workshops or formal meetings, but they are part of the collaborative process.

Allowing for this movement can slow a process in the short term, but it can also make later decisions more grounded and easier to carry forward. It helps prevent a core group from becoming increasingly coherent internally while drifting away from the wider relationships on which implementation depends. This movement also matters for people who cannot participate continuously. Working arrangements need to allow information to travel in forms that make sense outside the immediate group and provide routes for responses to come back into the work.

Timing also matters between different strands of the work. Technical analysis, engagement, implementation and governance may proceed separately for periods, but the process needs points where they reconnect before important choices become difficult to revisit.

Shape the work together

As participation widens, the starting position from Step 1 becomes something people can work on together.

Some parts may be confirmed. Others may be challenged or extended. What first appeared to be the central issue may look different when viewed from another position. New possibilities may emerge alongside new constraints.

Working together benefits from some practical agreement. People need to know how decisions will be made, how information will be shared, how differences will be worked through, and how people who are not present at every meeting will remain connected. These arrangements need not become elaborate rules. Their value is in making expectations discussable and giving participants something to return to when circumstances or relationships become difficult.

Relationships affect how well these arrangements work. People may arrive with different histories of collaboration, different levels of trust, or previous experiences of consultation in which little appeared to follow from their involvement. Participation depends partly on whether people feel able to question assumptions, introduce different knowledge, disagree, and see some response to what they contribute.

Participation does not imply that every difference will be resolved collectively. Some issues may remain contested, and some decisions may ultimately sit with people or organisations holding particular responsibilities or authority. Being clear about this can be more respectful than allowing a collaborative process to imply a degree of shared decision-making that does not actually exist.

Keep participation open to change

Participation is not completed once the initial direction has been shaped.

As the work moves into change logic, evidence gathering, interpretation and decision-making, different people may become relevant. An emerging question may require knowledge that was not previously present. An affected group may become more visible. Authority may shift as a decision moves from programme implementation to organisational or governance action.

There therefore needs to be some way of noticing when the current pattern of participation is no longer sufficient. This includes checking whether people who contributed earlier remain connected to what has developed, and whether people joining later can understand enough of the earlier reasoning to contribute meaningfully.

Participation remains part of the shared reasoning of the initiative as the work develops. The people involved, their roles and their influence may all need to change as circumstances and understanding change.



Some questions to work with

- Whose knowledge, interests, rights, responsibilities and experience need to shape the work, what authority needs to be recognised, and who may currently be missing?
 - What can different participants genuinely influence, and where do important decisions, authority and resources sit?
 - How will emerging ideas travel beyond the immediate group and return with responses from the organisations, communities or networks around it?
 - What agreements are needed about decision-making, information sharing and working through differences, including what will happen if important disagreement remains?
 - How will we notice when the mix of people involved, or the way they are involved, needs to change?
 - What would someone joining later need to know about how the direction and relationships have developed?
-

What are we trying to achieve, what possible ways forward are open to us, where should we focus effort, how might those choices contribute to change, and what assumptions or alternatives need attention?

Chapter 4 considered why this work needs enough direction to act while remaining open to learning. This step focuses on making the reasoning behind that direction visible enough to discuss, test and revise.

Why do people think a particular course of action may help? What changes are they hoping to influence along the way? What else needs to happen for those changes to become possible? What might support, constrain or redirect the work? Making some of this reasoning explicit turns an emerging direction into something people can examine together and return to later.

For people managing implementation, this direction provides a basis for deciding what to prioritise, sequence, coordinate or adjust as circumstances change.

Find a form that fits the work

There are many ways to make strategic reasoning visible. An initiative may use a strategy on a page, a logframe, a logic model, a Theory of Change, an outcomes map, a systems map, a short narrative, or some combination of these. Any of these can support a useful account of how change is expected to happen if people use them to make important choices, assumptions, dependencies and expected pathways explicit.

The difficulty is less the choice of tool than whether the reasoning has actually been worked through. A polished Theory of Change can conceal weak assumptions or disagreements just as easily as a poorly used logframe. Conversely, a simple logic model or strategy diagram can support good shared reasoning if people understand it, can explain the choices behind it, and are willing to question those choices as experience develops.

In this guide, **change logic** is simply shorthand for that reasoning about how strategic choices are expected to contribute to change, including the assumptions and wider conditions on which those expectations depend. It is not a particular method or artefact.

The form should fit the work. Some initiatives need a fairly detailed account because several organisations, activities and pathways have to connect. Others may need only enough structure to show the main strategic choices, intended changes and critical assumptions. The aim is to make the reasoning usable, not to produce a technically impressive model that few people can explain.

A useful change logic also makes visible the social, relational and institutional changes on which wider outcomes may depend. An initiative may expect people to develop greater awareness or capability, organisations to coordinate their efforts differently, relationships to strengthen, practices to change, or institutional arrangements to shift. Where these changes are part of how later outcomes are expected to occur, they belong in the change logic rather than remaining as background conditions.

In multi-actor work, some of the change may be in how people and organisations work together. Partners may develop clearer shared purpose, stronger working relationships, better ways of coordinating their contributions, greater ability to work through differences, or stronger connections back into their own organisations and communities. These are not necessarily ends in themselves. Their significance lies in whether the wider strategy depends on developing the capacity to act together.

Treat assumptions as things to learn about

Every strategy rests on assumptions. Some may be well supported by evidence or previous experience, while others are plausible expectations about how people will respond, whether a partnership will hold, what another organisation will do, how quickly change may occur, or what conditions will remain in place.

Once assumptions are visible, the practical question is which ones need attention as the work develops. Not every assumption deserves the same attention. Some can remain in view unless circumstances change. Others are more important because a substantial part of the strategy depends on them. It can be useful to distinguish between assumptions that can be followed through routine monitoring, those that need more deliberate inquiry, and those uncertain enough that an alternative course may need to remain open.

Change logic also carries assumptions about timing. Some changes may reasonably be expected quite early, while others depend on earlier changes accumulating, spreading or being sustained and may take much longer to become visible. Making those expectations explicit helps people ask what they should reasonably be looking for now, what would count as an encouraging early signal, and what would still be premature to judge.

The sequence will rarely be exact. Changes may overlap, stall, reverse or develop differently in different places. The purpose is not to predict a timetable for change, but to make the current expectations visible enough to test against experience.

This helps focus later evidence gathering. If an assumption proves weak, the response may be a small adjustment in implementation, a rethink of part of the strategy, or a return to an earlier question about how the situation itself has been understood. Finding that the original reasoning no longer fits can be useful learning, provided there is enough openness to act on what has been found.

Keep dependencies and wider influences visible

The changes people care about will rarely be produced by one initiative acting alone. Progress may depend on other organisations, policy settings, relationships, funding decisions, social conditions or environmental change.

The change logic therefore needs to make important dependencies visible. Which relationships need to hold? What actions by other organisations matter? Where does progress depend on decisions beyond the initiative's control? What wider changes could reinforce or undermine the strategy?

Some of these dependencies sit upstream of the immediate work. Funding arrangements, organisational incentives, policy settings, procurement or reporting requirements, and governance decisions can all affect whether people have the authority, resources or reasons to act differently. Where the strategy depends on these conditions, they belong in the change logic rather than being treated only as external context.

The initiative is unlikely to be able to change everything on which it depends, but it can make those dependencies visible enough to learn about them. Evidence may show that an expected pathway is being constrained less by local practice than by an organisational or funding arrangement that needs attention elsewhere.

This helps people think more realistically about contribution. An initiative may make an important difference while working alongside many other influences. The useful question is often how its actions interact with those influences and what that suggests about where effort should go next.

Making the reasoning visible may also expose a weakness in the current frame. An important dependency may have been overlooked, or a group affected by the proposed direction may not have been sufficiently involved. In that case, returning to Step 1 or 2 may be necessary before the change logic is taken any further.

Keep alternative pathways open where they matter

Some parts of the work may follow a reasonably clear sequence, while others depend on relationships, decisions or circumstances that cannot be known in advance. Where important uncertainty cannot be resolved in advance, it may sometimes be useful to treat an activity or approach as a limited test, making clear what is being tried, what people expect to learn and what would influence the next decision.

It can be useful to keep more than one pathway in view. Which choices need to be made now, and which can remain open until more is known? What changes or signals would make another course more appropriate? Are there assumptions on which too much of the current strategy depends? Questions like these can help people avoid locking themselves into one route simply because it was the first one written down.

This does not require elaborate scenarios for every possibility. The practical aim is to notice where flexibility matters and where later choices may need to respond to what is being learned.

Make the reasoning usable later

A change logic should preserve enough of the reasoning behind important choices for people to understand how the current direction was reached. This becomes more important as participants change, new partners become involved, or the initiative moves into another phase.

A diagram showing activities and outcomes is less useful if the assumptions, uncertainties and strategic choices that shaped it have disappeared from view. The record should leave enough of a trail for people to understand what was expected at the time, what depended on whom, and what later evidence is confirming, challenging or changing.

Keeping this reasoning accessible also makes later monitoring and evaluation more useful. People can compare experience with what was expected, examine why a pathway unfolded differently, and see whether new evidence is calling for a change in activity, strategy or framing.

Once the direction and its reasoning are visible, it becomes easier to see what the initiative most needs to understand and judge. Some questions will concern progress towards intended outcomes. Others will focus on assumptions, changes in the wider context, unintended effects, or whether the direction itself still makes sense.



Some questions to work with

- What are we trying to move towards, and where is there enough shared direction to act?
 - What strategic choices are we making about where to put effort, and what alternatives have we considered?
 - How do we currently think those choices may contribute to change, and which assumptions matter most?
 - What social, relational or institutional changes does the wider strategy depend on?
 - What needs to be decided now, what can remain open, and what might prompt us to reconsider the current direction?
 - What reasoning, assumptions and uncertainties need to remain visible so that later participants can understand and revisit the direction?
-

What do people need planning, monitoring, evaluation and learning to help them understand, judge and decide, and what will they use to make those judgements?

Once the direction and reasoning behind it are more visible, attention can turn to what people most need to understand as the work develops. Some questions will arise because an important decision is approaching. Others will remain useful over time because they help people notice whether progress is occurring, whether important assumptions still hold, and whether the effects of the work are acceptable.

Some of these will be immediate management questions about progress, constraints, coordination or where practical adjustment is needed; others will concern wider outcomes, assumptions or strategy.

This is where monitoring, evaluation and learning begin to take a more definite shape. The starting point is the questions that matter to the people who will use what is learned, rather than a list of indicators or data that happen to be available. Who needs to know what, by when, and for what conversation, judgement or decision? Starting there helps keep evidence connected to the work.

Start with what people need to understand and use

Different people may need different things from the learning process. Those involved in implementation may need to know whether activities are reaching the intended people or places and where adjustments are needed. Governance or funding bodies may need assurance that commitments are being met and resources used responsibly. Participants may want to understand what is changing, whose interests are being served, or whether the direction still reflects what matters to them.

These purposes can overlap, and the same evidence may sometimes serve several of them. At other times the needs differ. A reporting measure may provide useful assurance without explaining why something is happening, while a question that helps people adapt in real time may not provide the evidence needed for a later accountability judgement. Being clear about intended use helps people see where the same evidence can do more than one job and where different questions are needed.

Questions before indicators

Useful questions focus attention before methods or indicators are chosen. They might ask what is changing, why it may be changing, whether assumptions are holding, who is benefiting or carrying costs, what unexpected effects are appearing, and whether the current direction still makes sense.

Not every question needs to be followed continuously. Some may matter throughout the life of an initiative, while others become important at particular stages or decision points. A manageable set of questions that people actually return to is generally more useful than trying to monitor everything that could conceivably matter.

The questions themselves may also change. New decisions arise, circumstances shift and evidence can bring previously overlooked concerns into view. A change in strategy may make some questions less useful and create others. Returning periodically to what people most need to understand, and why, helps keep the learning process connected to the work rather than to the framework that happened to be developed at the start.

The companion guide, *Effective indicators for place-based initiatives* (Allen, 2026a), goes further into choosing and using indicators. Here the emphasis is on ensuring that indicators follow from what people need to understand, judge and decide.

Make the basis for judgement visible

Some questions can be answered mainly by description. Others require judgement. Is progress good enough? Is a change worthwhile? Are benefits and costs being distributed fairly? Is an approach acceptable given its risks or wider consequences? Has enough changed to justify continuing, expanding or changing direction?

Evidence alone cannot answer questions like these. People also need some basis for deciding what counts as worthwhile, sufficient, fair or acceptable. These criteria may already sit within agreed outcomes, legal or professional standards, community aspirations, funding commitments or organisational values. Others may need to be developed as the work takes shape.

Some criteria may concern the quality of collaboration or other less tangible changes. If the strategy depends on stronger relationships, greater capability or better coordination, people may need to discuss what meaningful improvement would look like. Making those expectations explicit can help shape how the work is carried out as well as provide a basis for later judgement.

Making criteria visible helps distinguish disagreement about evidence from disagreement about values or standards. People may agree about what has happened and still reach different conclusions because they are judging it against different expectations. Bringing those expectations into the discussion can make disagreement easier to understand and sometimes more productive. The criteria do not have to become highly formal, but they need to be clear enough for people to discuss how a judgement is being made.

It is also worth discussing what different participants will regard as credible evidence before too much information is gathered. A governance body, community group, technical specialist and programme team may begin with different expectations about what would constitute convincing evidence. These do not necessarily need to be reduced to one common standard, but surfacing the differences early can help people decide what evidence will be needed. It can also avoid discovering only at the end that important participants do not regard the findings as adequate for the judgement they need to make.

Work with different values and standards

Questions and criteria inevitably direct attention towards some concerns more than others. Organisational requirements often enter easily because they are explicit and formally supported, while other concerns may be less visible even when the consequences are significant. Participation in framing questions and criteria therefore matters as much as participation in shaping the earlier direction.

There will not always be one agreed view of what matters. Different groups may place different weight on effectiveness, fairness, cultural acceptability, cost, ecological consequences, risk or longer-term resilience. Where those differences remain important, it may be more useful to keep them visible than to force them into an apparently shared judgement. The practical task is to understand what different judgements rest on and what those differences mean for the choices ahead.

Use criteria before and after action

Criteria can be useful prospectively as well as retrospectively. They can help people assess options before committing to them, rather than being introduced only later when an evaluation is asked to judge what happened.

Asking what would make a proposed direction worthwhile, fair, acceptable or sufficiently robust can improve the decision itself. The same criteria, perhaps revised as understanding develops, can later help people consider what actually occurred. This creates a connection between strategic choice and later evaluation that is easily lost when criteria are introduced only after implementation is underway.

Criteria also do not need to become elaborate scoring systems. A small number of clearly expressed criteria may be enough to make judgement more transparent and consistent. Where more structure is useful, a rubric can help describe what different levels of quality or performance would look like.

Whatever form is used, someone coming later should be able to see what evidence informed an important conclusion, what standards or values were applied, and where uncertainty or disagreement remained. Keeping that reasoning visible makes judgements easier to revisit when circumstances change or new evidence becomes available.



Some questions to work with

- What do people most need to understand as the work develops, and what decisions or conversations will that learning inform?
 - Which questions need continuing attention, and which become important at particular stages or decision points?
 - Which questions require judgement as well as description, and what criteria will people use?
 - What rights, responsibilities, values, standards and interests need to shape those criteria, and where do important differences remain?
 - How can criteria help shape choices before action as well as judge what happened afterwards?
 - What will different participants regard as credible enough evidence for the judgements they need to make?
-

What evidence will help, and where and how will people make sense of it together?

Once people are clearer about the questions they need to explore and the judgements they may need to make, they are in a better position to decide what evidence is worth gathering. Some information may already be available through monitoring systems, administrative records, research or previous evaluation. Other knowledge sits with people involved in or affected by the work, and some evidence will need to be generated specifically for the questions at hand.

The choices depend on what people are trying to understand, how confident they need to be, when the evidence will be useful, and what can reasonably be sustained.

Evidence needs to earn its place

Monitoring systems can grow quickly. New questions lead to new measures, reporting requirements accumulate, and information continues to be collected because it has always been collected. Over time, producing the information can begin to crowd out the time available to think about what it is showing.

A useful starting point is to work back from Step 4. What evidence would help answer the questions people have identified? What would they need to see or understand to make the judgements ahead? If a piece of information showed something unexpected, is there a conversation or decision that it could influence?

Some questions justify careful investigation and several sources of evidence. Others may need only enough information to show whether things are broadly on track or whether closer attention is warranted. This is also where the distinction between more structured and more emergent parts of the work becomes practical. Routine monitoring may be sufficient where activities, expected changes and important assumptions are reasonably well understood. More uncertain or important assumptions may need more deliberate evaluation, drawing on several forms of evidence and interpretation.

Existing evidence is worth examining before creating new demands. Information collected for one purpose may be useful for another if its limitations are understood. Equally, readily available information may say little about the questions people now care about. Designing the evidence approach therefore includes deciding what can be stopped as well as what needs to be added.

Fit the evidence to the question

Indicators can be useful signals of progress, changing conditions or issues needing closer attention. They still have to be interpreted in context. A movement in an indicator can have several explanations, while an apparently stable measure may conceal important differences between people, places or circumstances. Some measures will track intended changes; others may help people notice whether important assumptions or conditions are shifting.

Evidence also needs to be interpreted against the expected timing of change. The absence of a longer-term outcome may tell people little if there has not yet been enough time for it to emerge. Conversely, an early change in awareness, capability, relationships or practice can be meaningful where the change logic suggests it should occur, without being treated as evidence that the eventual outcome has already been achieved.

Different questions also call for different forms of evidence, and many important questions will draw on more than one source. What matters is what each source can contribute to understanding the question and how confidently people need to answer it.

In place-based and multi-actor work, important changes are often social and relational as well as biophysical or technical. If progress depends on trust, participation, coordination, capability, institutional relationships or changes in practice, these need some way of being noticed and assessed. They may not lend themselves to the same kinds of measures as water quality, land cover or service delivery, but leaving them unexamined can make an initiative appear to be progressing while some of the conditions it depends on are weakening.

The ability to work together may therefore need to become part of the evidence picture. Are partners developing a clearer shared purpose? Are they becoming better able to coordinate their contributions, communicate across organisational boundaries, work through differences and follow through on commitments? Are connections back into their own organisations and communities strengthening or weakening? These questions do not necessarily require another large set of indicators. Stepping back periodically to consider these questions against a few agreed criteria may be enough to judge whether the ability to work together is developing as the strategy needs.

Bringing evidence together does not mean that different sources should tell the same story. Differences may arise because the evidence captures different aspects of the situation, because people experience the same change differently, or because circumstances are changing. Understanding those differences can sometimes be more useful than trying to resolve them into a single account.

Bring different kinds of knowledge into the inquiry

The knowledge people develop through practice and lived experience needs a place alongside formally collected evidence. People close to implementation may notice changes in participation, relationships or practical constraints before these appear in formal monitoring. Community and Indigenous knowledge may bring histories, relationships and ways of understanding a place that programme data do not capture. Technical analysis may reveal patterns, risks or relationships that are otherwise difficult to see.

Different forms of knowledge also come with different conditions around how they can be shared and used. Where knowledge sits within continuing relationships, responsibilities or systems of authority, bringing it into inquiry raises questions about who can share, interpret and use it. Chapter 6 returns to these responsibilities more fully.

Bringing these forms of knowledge together requires judgement about where each comes from, what it can reasonably tell people and where further inquiry may be needed. The credibility questions raised in Step 4 become practical here. Different forms of knowledge need not be treated as interchangeable for them to contribute to understanding the situation more fully (Tengö et al., 2014).

Technical knowledge also needs to enter the process in ways that support shared reasoning. Specialist analysis can arrive too early, too late, or in a form that effectively closes down discussion because few participants feel able to question it. Facilitation may be needed to frame useful questions for specialists, help people understand what technical findings do and do not show, and bring them into conversation with practical, local and cultural knowledge.

Build in places for sense-making

Collecting evidence does not itself create learning. People need opportunities to return to their questions, compare what they expected with what they are seeing, consider different interpretations, and decide whether something needs further inquiry or action. These opportunities do not have to sit only in formal review meetings. Useful sense-making may happen through shorter conversations, exchanges between workstreams, field visits or informal discussions that help people connect emerging evidence with what they are seeing elsewhere.

It helps to be clear about what a particular conversation is for. Some meetings are mainly for sharing updates. Others provide space to explore what evidence may mean and test different explanations. At some point a decision may be needed. When these purposes become blurred, groups can close down exploration before they have understood what is happening, or continue exploring possibilities when a choice actually needs to be made.

The quality of these conversations matters as well. People need enough room to say that something has not worked as expected, that evidence is uncertain, or that an earlier assumption may have been wrong. If raising difficulty is immediately treated as evidence of poor performance, important signals can remain unspoken.

Who takes part in interpretation also matters. Bringing different perspectives back into the discussion can reveal whether an apparent result looks different from another position, whether an explanation relies too heavily on one form of evidence, or whether the original question now needs to be reconsidered. A useful learning rhythm allows the focus to shift as the work develops, from implementation to assumptions, emerging effects or the direction itself.

Keep the system workable

Evidence gathering, interpretation and reflection require time and capability. A system that asks for more data, analysis or meetings than people can realistically sustain is likely to become a compliance exercise or gradually lose quality.

Capacity therefore needs to be considered when the approach is designed. Responsibility for gathering and holding evidence, undertaking necessary analysis and convening reflection needs to be clear enough that the work actually happens. Timing matters too. Evidence that arrives after the decision it was intended to inform may have little practical value, while evidence that arrives before people are ready to interpret or use it can also fail to connect with the work. Evidence gathering, interpretation and decision-making therefore need enough coordination for useful information to meet the conversations it can inform.

Where evaluators, consultants or technical specialists are engaged separately, it helps to agree early how their work will line up with implementation timing, and who will carry what they find into the conversations where practical choices are made.

The burden placed on people providing evidence also deserves attention. Repeatedly asking people for information or experience without showing how it has been interpreted or what happened as a result can become extractive and damage the relationships on which future learning depends. Closing the loop by sharing what has been heard, what has been made of it and what follows is part of credible practice.

A lighter system can sometimes support stronger learning because people have time to use the evidence they collect. Enough evidence, interpretation and context also needs to remain accessible for people to see patterns over time and understand how conclusions were reached. Step 6 turns that learning more deliberately towards decisions, adaptation and continuity.



Some questions to work with

- What evidence would help answer the questions and support the judgements identified in Step 4, and what already exists?
 - Which measures or other signals will help us notice important social, relational, institutional, biophysical or other changes, and whether key assumptions are holding?
 - What forms of knowledge and evidence need to be brought together to understand what is happening?
 - Where and when will people make sense of the evidence together, and is the purpose of those conversations clear?
 - Who needs to be involved in interpretation, and what will help people raise uncertainty, disagreement or evidence that something has not worked?
 - What evidence and learning routines can realistically be sustained with the time, skills and resources available?
-

Where and when will learning land, who can act on it, and what needs to be carried forward?

Evidence becomes useful when it finds its way into the conversations and decisions that shape what happens next. Sometimes a team can see that something is not working as expected and adjust what it is doing. In other cases, the people involved in implementation are not the people with the authority, resources or mandate to respond. Good evidence and thoughtful interpretation can therefore still leave practice largely unchanged if there is no clear route for learning to influence decisions.

Connect learning with the decisions that matter

Some decisions are known in advance. Planning and budgeting cycles, governance meetings, funding reviews and scheduled strategy discussions create natural points where evidence and learning can inform choices. Other decisions arise because circumstances change, an assumption becomes less convincing, a new opportunity appears, or experience begins to challenge the current direction.

It helps to know where important choices are likely to be made and who needs to be involved. What evidence will they need, and when? Who can bring practical experience or different interpretations into the discussion? Where does authority sit to adjust implementation, change priorities, move resources or reconsider strategy?

These connections are especially important in multi-actor work because authority is often distributed. People close to implementation may be able to change everyday practice but not programme priorities. A collaborative group may identify an issue that requires action by one of its member organisations. Governance bodies may hold formal authority while depending on others to understand what is happening on the ground. Learning is more likely to influence action when these routes are understood before a difficult decision has to be made.

Learning may therefore need to travel upstream as well as across the initiative. If evidence suggests that a recurring constraint is being created by a funding arrangement, organisational rule, performance expectation or governance decision, the appropriate response may not lie with those closest to implementation. The learning needs a route to the people who can reconsider the arrangement.

The initiative may not have the authority to make that change itself. That does not make the constraint irrelevant to what the initiative needs to understand and learn from. Being able to show how an upstream condition is affecting the work can itself be an important contribution to wider learning and decision-making.

Learning does not always lead to a shared conclusion. Where important disagreement remains, a decision may still be needed. In those situations it helps to be clear about who has the authority to decide, what evidence and criteria informed the decision, whose concerns remain unresolved, and what consequences may follow for different participants.

Make room to change course

Adaptation can involve anything from adjusting activities to reconsidering an assumption, relationship, allocation of resources, framing of the situation or wider strategy. New evidence may lead people back to the change logic, to the questions and criteria being used, or to who needs to be involved, without treating every revision as starting again. In multi-actor work, even a practical adjustment can affect partners' timing, commitments or resources, so changes may need to be coordinated rather than simply made.

It can help to identify signs that would prompt a closer look at the current direction. An important assumption may no longer hold, risks may be increasing, an expected change may not be appearing, or new possibilities may have opened up. Identifying these signs in advance can help people avoid continuing by default when there are good reasons to reconsider.

Timing matters in making that judgement. An expected early signal that does not appear may provide good reason to look more closely at the strategy. The absence of a longer-term outcome that could not yet reasonably have emerged may not. Equally, positive early changes should not be taken as assurance that the later outcomes will necessarily follow.

There also needs to be room to stop doing things. Activities and programmes can acquire momentum because people have invested in them, reporting systems have grown around them, or they have become part of organisational routines. Learning has limited value if the only acceptable response is to add something new while everything already underway continues. Adaptation may involve reducing effort, ending an activity, or shifting resources somewhere more useful.

Keep accountability connected to learning

Accountability and learning often draw on the same evidence, but they do not always require the same conversation. Accountability may require a clear account of whether commitments were met and responsibilities discharged. Learning needs room to explore why something happened, what was unexpected, where assumptions were weak, and whether a different response is now warranted.

Neither purpose should crowd out the other. Learning cannot become a way of avoiding responsibility for decisions and consequences, while accountability arrangements need enough room for uncertainty and changing understanding to be discussed. Keeping both purposes visible helps people decide when a conversation needs assurance, when it needs exploration, and when it needs both.

Use transitions as opportunities for learning

Initiatives move through phases. Funding periods end, programmes are redesigned, responsibilities shift, partnerships change and people leave. These transitions can easily be treated as administrative endings, with evaluation used mainly to account for what has happened.

They can also provide useful punctuation points. A transition creates an opportunity to draw together what has been learned, reconsider the reasoning behind the work and ask what should be carried into whatever follows. Its value may lie partly in helping the next group of people understand the position they are inheriting and the questions that remain unresolved.

This does not mean every initiative needs a formal phase model. The practical point is that transitions deserve attention because they are moments when learning can either be consolidated and carried forward or disappear as arrangements change.

Carry reasoning forward, not only findings

What later people need is more than a record of activities, indicators and results. They may need to understand why important choices were made, which assumptions were being tested, what alternatives were considered, where uncertainty remained, and what had already been learned about the wider situation. Continuity matters beyond a single programme, as later actors may otherwise inherit its visible structures without the reasoning that produced them.

This does not require documenting every discussion. The question is what someone coming later would need in order to understand the current position and make sensible choices from it. Some of this may sit in plans, monitoring records or evaluation findings. Some may be better captured in brief decision records, revisions to the change logic, or accounts of what was learned and why a course of action changed. Relationships and opportunities for handover can carry knowledge that documents alone cannot.

Learning can also travel across places and initiatives, although it needs to travel with some context attached. A lesson from one setting cannot simply be transferred elsewhere as a model to copy. Patterns, questions, assumptions and observations about the conditions that mattered can still be useful if people are able to consider how their own situation differs. Learning may also need to travel between local, regional and national levels, while retaining enough context for people at each level to understand what the experience can reasonably tell them.



Some questions to work with

- What decisions or conversations could the learning usefully inform, and when will those occur?
 - Who has the authority, resources or mandate to act, and where might learning need to travel beyond the initiative because the relevant constraint or decision sits elsewhere?
 - What signs or changes would prompt us to reconsider assumptions, activities or the wider direction?
 - Are there activities, commitments or routines that may need to be reduced, stopped or replaced?
 - What transitions are approaching, and what learning should be consolidated before responsibilities or arrangements change?
 - What reasoning, evidence and unresolved questions will later participants or decision-makers need in order to understand how the current position was reached?
 - How can learning travel to other places or initiatives without losing the context that gives it meaning?
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PART 3

Conditions for credible learning and adaptation

A connected way of working depends on more than a well-designed cycle. Relationships, influence, different forms of knowledge, organisational arrangements and the quality of inquiry all affect what people are able to learn and do. This part looks across the cycle at some of the conditions that make credible learning and adaptation possible.





6. Relationships, ethics and credible judgement

Shared learning depends not only on who participates, but on whose knowledge and values shape the work, whose concerns carry weight, and how evidence and judgement remain open to challenge. This chapter looks across the six-step cycle at power, representation, ethical responsibility, disagreement and the relationships needed for credible inquiry.

Chapter 5 considered the practical work of widening participation, making influence visible, bringing different forms of evidence into inquiry and creating places for collective sense-making. Those arrangements sit within relationships that are rarely neutral. People come to the work with different histories, responsibilities, resources, authority and ability to influence what happens next.

Relationships are not only conditions for credible learning. In some initiatives, strengthening relationships and the capacity to work together is itself part of the change being sought. The distinction matters because these changes may need to be planned for, followed and judged, as well as relied on to support the learning process.

Differences in people's histories, responsibilities, resources and authority affect planning, monitoring, evaluation and learning throughout the work. They shape which questions are asked, what is treated as credible evidence, whose experience is sought, how findings are interpreted and which conclusions reach the people able to act on them.

The steps in the previous chapter provide structure for connected practice. This chapter looks more closely at some of the relational and ethical conditions on which that practice depends.

Power and influence through the work

Power can be quite visible, through formal mandates, budgets or decision-making authority. It can also operate less visibly. Some people have easier access to decision-makers, more confidence in formal meetings, greater control over their time, or more familiarity with the language in which evidence and proposals are presented. Employment, caring responsibilities, travel, digital access and the practical costs of participation can all affect who remains involved as the work continues.

The way planning, monitoring, evaluation and learning are organised can reinforce or challenge these patterns. Decisions about what is monitored, whose experience is sought, which evidence is considered credible and who takes part in interpretation all influence what becomes visible. An issue that receives little attention in the original framing may become harder to raise later once indicators, reporting arrangements and organisational routines have formed around other priorities.

It is useful therefore to keep asking how influence is working. Where are important decisions actually made? Whose contributions are changing how the situation is understood? Whose concerns are becoming less visible as discussion moves towards decision?

Representation, rights and whose knowledge counts

The people taking part in a process are seldom the same as all the interests affected by it. Someone may have a formal mandate to represent an organisation or group, be trusted through long-standing relationships, or simply be the person available to attend. None of these automatically means that they can speak for everyone whose interests are involved.

Long-running initiatives cannot involve everyone closely in every conversation, so some form of representation is often unavoidable. What matters is remaining reasonably clear about what that representation can and cannot carry, and when there is a need to reconnect with others.

Representation is not the only issue. Indigenous peoples hold rights in relation to their lands, knowledge and participation in decisions that are not adequately captured by treating them as another stakeholder group (United Nations, 2007). The question is then not simply whether Indigenous perspectives are represented, but what rights, responsibilities and authority need to be recognised, and what that means for the way participation, inquiry and decision-making are organised.

The basis and form of that authority will differ between places and jurisdictions. The practical point is to avoid assuming that everyone enters a collaborative process only through an invitation to participate or through an interest that needs to be balanced against other interests.

These distinctions also matter for knowledge. Technical and professional knowledge may carry particular authority because it is documented or supported by recognised methods. Local and experiential knowledge can bring understanding closely connected with everyday practice and consequences. Indigenous knowledge may sit within relationships, cultural responsibilities and systems of authority that do not fit easily with conventional assumptions about collecting and using information.

Bringing different forms of knowledge together can broaden understanding. It can also reproduce existing inequalities if some knowledge is treated mainly as material to be gathered, translated and interpreted by others.

Work on Indigenous data sovereignty makes these responsibilities especially visible. The issue is therefore not only whether Indigenous knowledge is included as another source of evidence, but who has authority to share, interpret, hold and determine later uses of that knowledge. The CARE Principles for Indigenous Data Governance, for example, emphasise collective benefit, authority to control, responsibility and ethics (Carroll et al., 2020). They draw attention to questions extending beyond ownership of a dataset: who can gather knowledge, who holds it, who interprets it, and who decides how it may be shared or used later.

The particular responsibilities will differ between countries, peoples and settings. The wider point is that knowledge is not always simply information available for an initiative to collect. Rights, relationships and continuing responsibilities may remain attached to it.

Some interests cannot participate directly at all. Future generations may live with the consequences of present decisions. Rivers, forests, species and wider living systems can be affected without being participants in the usual sense.

Their interests enter judgement through people, institutions, law, cultural responsibilities, evidence and the boundaries used to frame what matters. There is no simple procedural solution to this. It remains important to ask who is claiming to speak for those interests, on what basis, and how that claim can be questioned.

Disagreement, conflict and credible inquiry

People can look at the same situation and reasonably see different things. Some differences reflect access to information, and further evidence may help. Others arise from different values, responsibilities, histories or relationships with the place or issue concerned.

Making criteria visible, as discussed in Step 4, can help show what judgements rest on. It does not remove the differences behind them.

History can be particularly important. People may enter an initiative carrying experience of earlier programmes, consultation processes, broken commitments or long-standing relationships between organisations and communities. Trust is seldom created by the current process alone.

Collaborative work often places considerable value on agreement. Sometimes agreement is needed for action. At other times, reaching it too quickly can conceal differences that would be more useful to understand. A clearer account of where people differ, what evidence they accept, and what values or responsibilities shape their judgement may be more useful than an apparently shared position that smooths over important disagreement.

These differences also place demands on relationships. People may hesitate to question weak evidence, unintended consequences or an assumption that no longer seems convincing because they do not want to damage trust or appear disloyal to the collective effort. Critique offered without attention to relationships can in turn close down the conversation through which learning needs to occur.

One practical response is to keep attention on the reasoning. What evidence supports this claim? What criteria are being applied? What else might explain what we are seeing? What would cause us to reconsider? Framing challenge around shared questions can make it easier to examine difficult issues without turning every disagreement into a contest between people.

Facilitation can help by making room for uncertainty and minority views, slowing premature agreement, and noticing when status or authority is making some interpretations harder to question.

A useful working relationship still has disagreement in it. What it needs is enough trust, clarity and procedural fairness to keep difficult questions in the room. There will also be times when people cannot reach agreement, trust has weakened, or the current way of working no longer holds. There is no general procedure that resolves these situations. Some decisions may still need to be made by those who hold the relevant mandate, while disagreement remains visible. Other situations may call for mediation, changes in how the work is convened, or a reconsideration of whether the current arrangement can continue.

These moments need care, humility and attention to relationships, power and responsibility. Better facilitation can create conditions for difficult issues to be explored, but it cannot remove genuine conflicts of interest, reconcile every difference in values, or create authority that does not exist.

Views can also change. People learn, relationships develop and consequences become clearer. Keeping some trace of earlier disagreement and the reasoning around it can be useful when later decisions return to assumptions that once appeared settled.

Ethics as an ongoing responsibility

Ethics is often treated as something addressed at the start of a piece of work through consent, confidentiality and formal approval where this is required. Many ethical questions only become visible later.

Information gathered for one purpose may become useful for another. A story shared in confidence may contain an insight that others want included in a report. Findings may create difficulties for particular people or organisations. Participants may not have anticipated how material from several sources could later be combined.

Confidentiality can also be difficult in small communities or specialised fields, where removing names may not prevent identification. Aggregating information may protect individuals while hiding differences that matter.

Ethical responsibility continues into interpretation and use. Who can see emerging findings and question them? How are uncertainty and disagreement represented? Are knowledge and information being used consistently with the conditions under which they were provided?

These questions become particularly important where relationships continue beyond a single evaluation or funding period. The way evidence is gathered, interpreted and reported can affect people's willingness to participate in future work.

Circumstances also change. An arrangement that seemed reasonable at the outset may need reconsideration as new uses of information emerge or the consequences of sharing it become clearer.

Credibility, roles and standpoint

Planning, monitoring, evaluation and learning are often carried out by people who are themselves involved in the work. Programme staff may review activities they helped design. Facilitators may help groups interpret evidence from processes they have supported. Community researchers may have long-standing relationships with participants. External evaluators may also become closely connected with an initiative over time.

Being close to the work can create blind spots. It can also provide forms of understanding that someone further removed may not have.

Independence can be important, particularly where interests conflict or strong accountability requirements apply. Distance does not automatically produce a more credible account. People coming from outside bring their own assumptions and may know less about the history, relationships and everyday workings of an initiative.

The more useful question is how a person's role and standpoint affect what they are able to see, what they may overlook and how their interpretation can be examined by others.

Credibility can be strengthened by bringing different sources and perspectives into the inquiry, making the reasoning behind important judgements visible, and being open about uncertainty and disagreement. Collaborative interpretation is not automatically credible because several people were involved. Groups also have power relationships and shared blind spots.

A credible account does not have to persuade everyone. Some differences will remain. Other people should be able to see enough of the evidence, reasoning, values and limits behind a judgement to question it and consider whether another interpretation is possible.



7. Organisational conditions for learning and adaptation

Keeping planning, monitoring, evaluation and learning connected depends partly on conditions beyond the design of the learning process itself. Reporting requirements, funding arrangements, organisational culture, authority, capability and continuity all affect whether evidence can be interpreted and acted on. This chapter looks at some of the organisational conditions that support, or constrain, learning and adaptation.

Most place-based and multi-actor initiatives work within arrangements that are already partly established. Reporting systems, indicators, funding periods, organisational responsibilities and information systems may all have been decided before the current work began. These arrangements can provide useful continuity and accountability, while also shaping what receives attention and what people are able to change.

These conditions do more than support or constrain the learning process. They can also shape the change itself. Funding arrangements, organisational incentives, decision rights and reporting expectations influence what people pay attention to, what they are able to change and what kinds of action are rewarded. Where they materially affect the pathway to change, they may themselves need to become subjects of inquiry and adaptation.

The practical task is to understand the conditions already surrounding the work, strengthen useful connections where possible, and recognise when an obstacle requires wider organisational change.

Work with what is already there

Before adding new processes, it is worth seeing how learning already happens. Organisations may have established reporting cycles, review meetings, monitoring systems, planning processes and informal ways of noticing what is changing. Some already provide places where evidence and experience can inform decisions. Others mainly serve administrative or accountability purposes.

Looking across these arrangements can reveal where modest changes would strengthen the connections. Evidence may need to reach an existing meeting earlier. A review process may need more room to consider unexpected effects or assumptions. Questions that matter across several workstreams may be carried through existing processes rather than creating another reporting layer.

Existing arrangements can also work against learning. Information may be produced too late to affect decisions. Measures developed for one purpose may continue after the questions have changed. Different parts of an organisation may collect related information without having a place to consider it together.

Some of these problems can be improved locally. Others reflect the way the organisation itself is structured, funded or governed.

Create room to respond to learning

An adaptive approach needs more than evidence. People need some room to respond to what they learn.

This can be difficult where programmes are expected to pursue changing or uncertain outcomes through arrangements built around fixed activities, outputs and budgets. People may be encouraged to learn and adapt while still being judged mainly against whether the original plan was delivered as written (Desai et al., 2018).

The issue is partly one of mandate. What can people change without seeking further approval? Where can resources be moved? Which commitments are genuinely fixed, and which can be reconsidered when circumstances change?

Some commitments require stability, and accountability depends on people being able to see what was promised and what happened. Adaptive work also needs some authorised space for changing course when evidence, experience or changing conditions provide good reason.



Figure 7.1. Organisational conditions shape whether learning can be acted on and can themselves become part of the inquiry.

This can include performance expectations that recognise responsiveness and learning alongside delivery. It also helps to be clear about which decisions sit with programme teams, which require governance or funder involvement, and how issues can move between those levels.

Sometimes the main constraint is not a lack of evidence but a lack of permission to respond to it. An organisation that repeatedly gathers lessons without creating ways to act on them may have a governance or management problem rather than a monitoring problem.

Keep reporting and learning connected

Reporting and learning often draw on some of the same evidence, but they place different demands on it. Formal reporting may need consistency, comparability and a stable account of whether commitments have been met. Learning may require people to notice unexpected developments, revisit assumptions or change the questions being asked. Both purposes matter.

Problems arise when reporting requirements become the main organising logic for planning, monitoring, evaluation and learning. Information that is required tends to be collected first, while questions that matter for improving the work can receive less attention. Over time, organisations can become efficient at producing information for upward reporting while losing sight of what people involved in implementation need for decisions.

Parallel systems sometimes emerge as a response, with one set of information produced for formal reporting and another used internally. This may occasionally be necessary, but it adds workload and can widen the distance between accountability and practice.

Where possible, the two should be connected without assuming that they must become identical. Some measures may remain stable because continuity matters. Other questions and forms of evidence may need to change as circumstances develop. Reporting cycles can sometimes be arranged so that evidence is considered before important decisions rather than assembled only afterwards.

The organisational culture surrounding reporting matters as much as the formal system. If evidence is mainly used to defend previous decisions or attribute poor performance, people have good reasons to be cautious about surfacing uncertainty, failure or unintended effects. Learning depends partly on whether there is room to say that an assumption was wrong or that the current approach needs reconsideration.

Persistent tension within partnerships can sometimes point to the same issue. Strained relationships may reflect unclear mandates, competing performance expectations or organisational arrangements that repeatedly place people in conflict. These are not always problems that better facilitation can resolve. Where this is the case, the response may need to involve changes in mandates, incentives, decision rights or organisational arrangements rather than asking participants to work harder at the relationship.

Technique alone cannot create the room needed for learning. The work of connecting also needs to be recognised and resourced.

Resource the work of connecting

Learning, interpretation and adaptation take time. So does keeping different parts of the work connected.

Chapter 5 considered this from the perspective of an initiative: someone needs to convene reflection, bring evidence back into discussion, maintain useful records and help learning reach decision-makers. At organisational level, the question is whether those functions are recognised and resourced.

They can easily become invisible work. A programme may have resources for implementation and formal reporting while leaving little time for people to examine what the evidence means, reconnect with partners or carry learning between workstreams. These functions then depend on individuals doing additional work around their formal responsibilities.

Organisations also need to recognise that multi-actor work may require a combination of technical, relational and facilitative capability. These capacities do not always sit in one person, but they need to be present somewhere in the way the work is supported.

Funders and organisations can help by allowing time and resources for reflection, facilitation, synthesis and exchange. Responsibility for holding the connections across the work also needs to be clear enough that the work does not depend entirely on whoever happens to pick it up.

The level of effort may change over time. A new or uncertain area of work may need closer attention while people learn how it behaves. Once patterns become clearer, some monitoring or review can be simplified. A previously minor issue may in turn become important enough to warrant more attention.

Capability develops through use as well as training. A simpler process that people understand and can sustain may support stronger judgement than a technically demanding system that gradually becomes detached from everyday work.

Treat continuity as an organisational responsibility

People leave, funding periods end, organisational structures change and initiatives reappear under new names. These transitions can break connections between earlier reasoning and later decisions.

Chapter 5 considered what reasoning later participants may need to inherit. The organisational issue is what makes that continuity possible.

Much of what people know sits in relationships and accumulated experience as well as formal records. Organisations can help retain some of this through purposeful handovers, overlap between incoming and outgoing staff where possible, and continuing responsibility for important learning across programme phases.

A small number of accessible records can also help maintain a thread through the work: key assumptions, significant decisions, changes in direction and unresolved questions. The value lies in keeping enough context for later people to understand how the present position was reached.

Longer-term initiatives also have to work across funding periods that may be much shorter than the changes they are trying to support. Important questions therefore sometimes need to survive programme redesigns even when indicators, contracts and organisational structures change.

Institutional memory is useful when it helps people understand and question what came before. Continuity should not become a reason for preserving approaches that no longer fit.

Follow learning to where the constraint sits

Some limits can be addressed by changing how planning, monitoring, evaluation and learning are organised, while others lie in organisational, funding or governance arrangements.

If people are collecting information that nobody uses, the evidence and learning arrangements may need simplifying. If evidence cannot reach the relevant decision-makers, the connection may need redesigning. If people understand what needs to change but have no mandate, resources or organisational support to respond, the inquiry needs to extend further.

In these situations, the arrangements themselves become legitimate subjects for learning. What incentives or assumptions are they creating? What behaviour do they encourage or discourage? What would need to change for people involved in implementation efforts to respond differently?

Formal authority to change these arrangements may sit elsewhere. The practical task is to make the connection visible and help the learning reach those who hold that authority. Organisations, funders and governance bodies therefore share responsibility not only for creating conditions in which learning can influence action, but also for learning from how their own arrangements affect the work.



8. A changing landscape for evidence and judgement

Changes in evidence practice, digital systems and AI provide a useful test of the ideas developed through this guide. They alter how information can be gathered, combined and interpreted, but they do not remove the underlying questions about what becomes visible, whose knowledge counts, how judgements are reached and where responsibility sits. This chapter looks at those changes through that lens.

More information can now be gathered, connected and analysed than was possible even a few years ago. Digital systems increasingly shape how evidence is stored and presented, while generative AI can assist with searching, summarising, qualitative analysis and drafting.

At the same time, there is continuing interest in giving people involved in or affected by place-based, community-based and other multi-actor initiatives greater influence over the questions asked, how evidence is interpreted and how judgements are made. Different forms of knowledge are receiving more attention, along with questions about who controls data and how information gathered for one purpose may later be reused.

These developments create new possibilities for the work, and for how planning, monitoring, evaluation and learning can support it, but they also bring familiar concerns into new forms. What is being made visible, and what is being left out? What happens to context as information is combined and summarised? Can people follow how an interpretation was reached? Who remains responsible for the judgement that follows?

Changing expectations around evidence

Monitoring and evaluation have often been organised primarily around the information needs of funders, governments and programme managers. Those needs remain important, but they increasingly sit alongside expectations that people closer to the work should have greater influence over the questions being asked, how evidence is interpreted and how learning is used.

At the same time, evidence practices are changing. Quantitative measures sit alongside qualitative, experiential, local and Indigenous knowledge, while evaluation is increasingly used during implementation alongside monitoring, reflection and adaptive management. Greater technical capacity to gather and analyse information should not narrow what remains visible or who can take part in interpreting it.

Data systems and what becomes visible

Digital systems make it easier to bring together administrative data, monitoring records, surveys, spatial information and other forms of evidence. Information can be updated more quickly, patterns can sometimes be noticed earlier, and data already collected for one purpose may become available for another. These possibilities do not make the underlying evidence neutral.

Data systems carry earlier decisions about what was worth collecting, how categories were defined and whose circumstances fitted those categories. Information that can be readily counted, coded and combined may become more prominent than knowledge held through relationships, experience or local interpretation.

Context can also be lost as information travels. A measure developed for one purpose may later be reused without the assumptions and limitations that originally accompanied it. Data gathered in one setting can become detached from the relationships or permissions under which it was provided.

As Chapter 6 discussed, information may also carry continuing rights and responsibilities. Easier access and reuse make it more important to retain enough context to understand where information came from, why it was gathered and what it can reasonably support.

As dashboards and integrated datasets become more common, it remains useful to look behind them occasionally. What has been selected? What has been combined? What has disappeared through aggregation? What earlier choices are shaping what now appears to be the evidence?

AI, provenance and collective interpretation

Generative AI extends these questions. It can help people work through large amounts of material, organise information, identify possible patterns and prepare draft summaries or reports. Used with care, it may reduce time spent on routine processing and make some forms of analytical support more accessible.

It can also make the work behind an interpretation harder to see. A coherent summary may conceal accounts that were difficult to reconcile. Themes generated across many interviews may give less prominence to unusual cases or minority views. Polished language can make relationships between evidence and conclusion appear more settled than they are.

These problems are not entirely new. People also select, classify, summarise and interpret evidence, and collaborative processes can lose track of where ideas originated. AI changes the speed and scale at which this can happen.

The important question is where AI entered the work and what depended on it. Using it to organise material is different from relying on it to interpret contested evidence or contribute to an evaluative judgement.

For significant conclusions, provenance therefore matters. People may need to know what evidence was used, what processing or synthesis occurred, where AI contributed and where human interpretation entered. Complete technical traceability will not always be possible or worthwhile. Enough of the path should remain visible for others to examine an important judgement and consider whether another interpretation is plausible.

There is also a participatory issue. AI can produce a rapid synthesis of many contributions, but synthesis is not the same as collective sense-making. Conversations in which people compare interpretations, hear how others understand the situation and revise their own views are themselves part of the learning process. A similar-looking written output does not mean that the same learning has occurred.

These questions are explored more fully in *Working well in the age of AI: Judgement and responsibility in professional and collaborative practice* (Allen, 2026b). The concern here is what these changes mean for keeping evidence, learning and judgement connected to the wider work.

Keeping judgement and responsibility visible

Particular technologies will continue to change. The more durable questions concern their purpose, what becomes more or less visible through their use, and whether people can understand enough of an analysis to question it.

The level of scrutiny should reflect what is at stake. Preparing an internal working summary does not require the same assurance as analysis informing a significant public or funding decision. People also need enough understanding of new tools to recognise where they are useful, where their limits matter and when another form of inquiry or conversation would be better.

Digital systems and AI will change how some monitoring, evaluation and learning work is done. They do not change the underlying responsibility to keep the basis for important judgements visible and open to question. If anything, they make it more important to retain context and distinguish synthesis from collective interpretation. They also sharpen questions about who is affected by a judgement and who is responsible for acting on what is learned.



9. What this means for practice

The preceding chapters have looked at how planning, monitoring, evaluation and learning can remain connected as place-based, community-based and other multi-actor initiatives develop. This final chapter draws together some implications for practice. They are less a set of additional principles than reminders about what needs attention if shared reasoning is to remain useful as circumstances, people and decisions change.

These initiatives take many forms across different places, programmes and fields of practice. Some settings can rely on relatively simple arrangements. Others need sustained attention to participation, uncertainty, competing values, changing conditions and distributed authority.

Across those differences, the recurring challenge is to keep enough of the work connected for people to understand what is happening, make considered judgements and decide what to do next.

The six-step cycle provides practical places to work on those connections, from framing and participation through to evidence, decisions and continuity. Chapters 6–8 look across the cycle at some of the conditions that help those connections hold: relationships, rights and authority, organisational room to respond, and ways of handling knowledge and evidence that keep important judgements open to question.

Strengthen the connections already in the work

Most initiatives already have ways of planning, acting, sharing knowledge, reviewing progress and making decisions. The useful starting point is to look at how well these activities connect.

Small changes can sometimes make a considerable difference. Evidence may need to enter a conversation earlier. A question that has become more important may need to be brought back into view. Different people may need to take part in interpretation. Learning may need a clearer route to the people with authority or resources to act.

This perspective also helps avoid adding process for its own sake. Another indicator, meeting or reporting requirement is not necessarily the answer when the underlying problem is a weak connection between parts of the work. A modest change in timing, participation or the route between learning and decision-making may do more to strengthen the work than another layer of monitoring or reporting.

The same applies when people inherit arrangements developed under earlier circumstances. Starting again is rarely necessary. The more useful question is often where the existing connections have weakened and what would help restore them.

Keep the shared reasoning in view

These initiatives depend partly on the developing account people hold together about what they are trying to achieve, why they think particular choices may help, what they are noticing, and what they are learning from experience.

That shared reasoning will never be complete or fully agreed. Different people know different things and bring different values, responsibilities and histories. Conditions change. Some assumptions prove more useful than others.

Planning can make enough of the current reasoning visible to work with. In changing settings, the plan and change logic can usefully be treated as a working hypothesis. Monitoring, evaluation and reflection then help people compare what they expected with what is actually happening.

Judgement remains central. Evidence cannot by itself determine what counts as worthwhile progress, what consequences are acceptable or when the current direction needs reconsideration. Criteria, assumptions and uncertainty need to remain visible enough for people to understand how important conclusions are being reached.

Agreement is not always the measure of a good learning process. Sometimes progress lies in understanding more clearly where people differ, what those differences rest on, and what they mean for the choices ahead.

Shared reasoning also needs enough continuity to survive changes in people and programmes, so that later participants can understand how the current position was reached and what questions remain open.

Look after the conditions that make collaborative learning possible

A well-designed cycle cannot by itself create the conditions for learning and adaptation.

Relationships matter because people need to be able to raise uncertainty, question assumptions and introduce evidence that may be inconvenient. Rigour matters too, since maintaining workable relationships cannot mean protecting established views from challenge. Credible inquiry depends on being able to hold both.

Someone also has to pay attention to the connections. Evidence may not reach interpretation, or learning may not reach decisions. Important perspectives may gradually fall away. Reporting requirements may begin to organise the work more strongly than the questions people need to explore.

Noticing and responding to these shifts is part of the work itself. It may be carried by programme leads, facilitators, evaluators, learning advisers or several people together. Whatever the arrangement, it needs time, recognition and enough continuity to be sustained.

Organisational conditions matter too. Teams can be encouraged to learn and adapt while having little authority to change course, shift resources or revisit earlier commitments. In those circumstances, better evidence will only take the work so far. Funders, governance bodies and organisational leaders share responsibility for creating enough room for learning to influence what happens next.

Changes in evidence practice matter here too. Digital systems and AI can help people gather, organise and synthesise information, but they can also distance conclusions from their sources and from the collective interpretation through which learning develops. Important judgements therefore need enough context and provenance to remain visible and open to question.

Keep the horizon wider than the programme

These initiatives have formal boundaries, but the changes they seek and the consequences they create often extend beyond them.

Progress may depend on other organisations, policy settings, communities, economic conditions or ecological change. Effects may appear elsewhere or much later. Programmes end while places, relationships and many of the consequences of earlier choices continue.

Keeping this wider horizon in view helps people ask what lies outside the immediate mandate but still matters for understanding contribution, consequences and responsibility. It also helps guard against judging success too narrowly around what can be seen within one programme or funding period.

Some affected interests may not be able to participate directly. Others may only become visible as the work develops. Boundaries therefore need to remain open to question rather than becoming fixed simply because they were drawn at the beginning.

The same care is needed when learning travels between places or initiatives. Experience elsewhere can inform thinking, but its usefulness depends on retaining enough context for people to judge what may apply in their own situation.

A continuing question

Methods, technologies and the people involved will all change. What remains is the need to keep enough connection across the work for people to learn from experience and make considered choices as circumstances develop.

The cycle is therefore not something to complete once, but a set of steps to return to when participation, direction, evidence, judgement or decision-making need to be reconnected. The question running through this guide is worth returning to:

What needs to stay connected here if people are to learn from experience and use that learning while there is still time to act?

The answer will change as the work develops. Keeping that question alive may be more useful than trying to settle the connections once at the beginning.



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Related Learning for Sustainability resources

This guide draws on a wider body of practical material developed and curated through the Learning for Sustainability website. The companion guide below explores indicator development and use in greater depth. The web resources that follow provide more detailed guidance, tools and reflections for readers who want to explore particular aspects further.

The core web resources connect most directly with the guide's practical concerns: working with others, setting direction, making change logic visible, linking planning with monitoring and evaluation, developing useful indicators, and supporting collective sense-making. The following page widens out to related areas such as systems thinking, reflective practice, ethics, adaptation and the changing evidence landscape.

Companion guide

Effective indicators for place-based initiatives

A companion guide to developing and using indicators in collaborative, place-based and multi-actor settings, including their use for monitoring, evaluation, judgement and adaptive management. <https://learningforsustainability.net/effective-indicators-guide/>

Core web resources

Supporting change in multi-actor settings

Resources on participation, shared learning, collaborative processes and working with different perspectives.

Social learning

Resources on how people learn with and from one another, build shared understanding, work across different perspectives, and connect reflection and dialogue with collective action and adaptation.

Strategic planning and direction setting

Resources for clarifying direction, exploring alternative futures, making strategic choices and keeping plans open to revision as circumstances change.

Monitoring, evaluation and learning

Related material on learning, adaptation, indicators and evaluative judgement.

Linking planning with monitoring and evaluation

Explores planning, monitoring and evaluation as a connected learning cycle, linking situation analysis, direction, action, evidence and adaptation.

Theory of Change

Guidance on clarifying purpose, making assumptions visible and linking intended changes with evidence, learning and adaptation.

Wider practice lenses

These resources extend into related areas that help people work with complexity, reflection, adaptation and ethical responsibility. They provide wider perspectives for understanding the settings in which collaborative and place-based work develops, and for considering how learning and judgement are shaped by relationships, changing conditions and the broader system.

Systems thinking and complexity-aware thinking

Resources for understanding relationships, complexity, framing and intervention in changing systems.

Behaviour change

Resources for understanding how practices shift over time, connecting individual behaviour with social, organisational and wider system influences.

Facilitation

Practical material on designing and supporting collaborative processes, collective sense-making, dialogue, learning and decision-making over time.

Reflective and reflexive practice

Resources for supporting reflection, questioning assumptions and learning from experience as professional practice changes.

Climate adaptation / place-based practice

Material connecting adaptive management, learning and long-term decision-making in environmental and place-based settings.

Human ethics in research and evaluation

Practical guidance for independent and collaborative research and evaluation, with particular attention to consent, relationships, power, care and ethical judgement as work unfolds. Includes protocols and guidance for collaborative peer review.

Working with generative AI

Resources on using generative AI in professional and collaborative practice, with attention to evidence, interpretation, provenance, judgement, ethics and responsibility.

About this guide

Keeping the work connected brings together ideas and practical resources developed through long-running work supporting planning, monitoring, evaluation and learning in place-based, community-based and other multi-actor settings. It draws on experience in evaluation, facilitation, strategic and collaborative planning, systems thinking, social learning and adaptive management, together with material developed and curated through the Learning for Sustainability website.

The guide is intended as a practical orientation rather than a new framework for planning, monitoring, evaluation and learning or a comprehensive methods manual. It focuses on the connections among these practices and on how strategic direction, implementation, evidence, judgement and learning can remain connected as the work develops. The related resources on pages 72–73 provide more detailed material for readers who want to follow particular approaches or methods further.

About the author

Will Allen is an independent systems practitioner, evaluator and facilitator based in Ōtautahi Christchurch, Aotearoa New Zealand. For more than 30 years his work has focused on collaborative approaches to environmental management and sustainability, including systems thinking, facilitation, strategic planning, monitoring and evaluation, social learning and adaptive management.

He developed and curates the Learning for Sustainability website, which brings together practical resources for people working with complex environmental, social and organisational change.

A note on AI use

I used generative AI tools during the development of this guide as thought partners for exploring ideas, reviewing structure and language, and assisting with some graphics. I also used them iteratively to test the coherence of the guide and identify repetition, gaps and alternative ways of organising material. I determined the overall framing, decided what to accept, reject or substantially revise, and retained responsibility for the arguments, interpretations, source checking and final text.

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