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The Alignment of Staff Knowledge and Learning with the World Bank's Strategic Priorities: An Assessment

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WBI Evaluation Studies
EG08–133

World Bank Institute
The World Bank
Washington, D.C.

November 2007

Acknowledgments

The authors are very grateful to the 23 Regional managers and 17 knowledge and learning coordinators who generously answered our interview questions, to the 299 World Bank staff members who completed our survey, and to the Chief Learning Officer's office, notably Ana-Maria Arriagada, Jan Weetjens, Donald MacDonald, Brigitte Petit, Kristin Strohecker, Hye-jung Hwang, Katharina Ferl, and Morallina George, who provided feedback, data, and information used in the study. This report also benefited from the thoughtful review of Klaus Tilmes and Michael Randel from the Independent Evaluation Group Knowledge and Evaluation Capacity Development (IEGKE), and of Rema Balasundaram from the Quality Assurance Group (QAG). Thanks also to Dawn Roberts for her contribution to the coding of the learning activities recorded in the World Bank's Learning Management System (LMS), to Maurya West Meiers for early contributions to project conceptualization, to Anwesha Prabhu and Izlem Yenice for excellent research assistance, to Elisabeth De Meuter and La Shann Johnson for scheduling the interviews, to Nidhi Khattri and Jaime Quizon for reviewing our survey instrument, and to Humberto Diaz and Sadaf Tajammal for document formatting.

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Suggested citation: Lockheed, Marlaine, and Violaine Le Rouzic. 2007. *The Alignment of Staff Knowledge and Learning with the World Bank's Strategic Priorities: An Assessment*. Report No. EG08–133 Washington, DC: World Bank Institute.

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Acronyms and Abbreviations

ACS	Administrative and Client Support
AFR	Africa Region
AFRVP	Office of the Regional Vice President of the Africa Region
AFTQK	Africa Technical Families: Operational Quality and Knowledge
AFTRL	Africa Technical Families: Operational Quality and Knowledge Results and Learning
AIS	Activity Initiation Summary
BBL	Brown Bag Lunch
CD-ROM	Compact Disk - Read Only Memory
CLO	Chief Learning Officer
CO	Country Office
CSRRM	Resource and Performance Management Department
EAP	East Asia and Pacific Region
EAPCO	East Asia and Pacific Central Operational Services Unit
EAPVP	Office of the Regional Vice President of the East Asia and Pacific Region
ECA	Europe and Central Asia Region
ECAVP	Office of the Regional Vice President of the Europe and Central Asia Region
ESSD	Environmentally and Socially Sustainable Development Network
EXT	External Affairs, Communications and United Nations Affairs
FSE	Financial Sector Vice Presidency
FY	Fiscal Year
GA-GD	Grade A through Grade D
GDLN	Global Development Learning Network
GE	Grade E
GF	Grade F
GG	Grade G
GH	Grade H
HDN	Human Development Network
HQ	Headquarters
HR	Human Resources
HRS	Human Resources Vice Presidency
IBRD	International Bank for Reconstruction and Development
ILP	Individual Learning Plan
ISG	Information Solutions Group
IT	Information Technology
JPA	Junior Professional Associate
K&L	Knowledge and Learning

KLB	Knowledge and Learning Board
LCR	Latin America and Caribbean Region
LCRVP	Office of the Regional Vice President of the Latin America and Caribbean Region
LCSLU	Latin America and Caribbean Region Operational Services Regional Learning Unit
LCSOS	Latin America and Caribbean Region Operational Services
LIC	Low-income country
LMS	Learning Management System
MIC	Middle-income country
MNA	Middle East and North Africa Region
MNACS	Middle East and North Africa Region Operational Core Services
MNAOS	Middle East and North Africa Region Operations Services
MNAVP	Office of the Regional Vice President of the Middle East and North Africa Region
OECD	Organisation for Economic Co-operation and Development
OPCS	Operations Policy and Country Services Vice Presidency
P&T	Professional and Technical
PREM	Poverty Reduction and Economic Management Network
PSD	Private Sector Development Network
RLC	Regional Learning Coordinator
RMT	Regional Management Team
SAP	Systems, Applications, and Products
SAR	South Asia Region
SAROQ	South Asia Region Operations Quality Unit
SARSQ	South Asia Region Operational Services and Quality
SARVP	Office of the Regional Vice President of the South Asia Region
SFR	Strategy Finance and Risk
SLC	Strategic Learning Center
SPC	Strategy and Performance Contract
TF	Trust Fund
TLAP	Trust Fund Learning and Accreditation Program
TTL	Task Team Leader
VP	Vice President
VPU	Vice Presidential Unit
WBI	World Bank Institute
WBIEG	World Bank Institute Evaluation Group
WPA	Work Program Agreement

EXECUTIVE SUMMARY

1. By the beginning of fiscal year 2006 (FY06), a combination of three conditions—the sophistication of middle-income country counterparts, decentralization of the World Bank to over 100 country offices and increased reliance on newly hired, local (frequently junior) staff and consultants—had created a situation whereby the highest performance risks in all Regions related to staff capabilities. Regional Managers expressed concern about shortcomings in staff (a) professional and technical expertise, including sensitivity to the political economy of the country and ongoing global issues, (b) practical operational knowledge, including project implementation skills, and (c) communications skills and country knowledge needed for being effective on the ground. *Yet nearly half of observable learning opportunities offered to and received by Regional staff in FY06 were not aligned with these priorities, having instead the objective of raising awareness rather than building key skills*.

2. Compounding this and despite the recognized efforts of many Regional and Strategic Learning Center learning coordinators, internal formal staff learning remained a low priority with front line managers. Moreover, the Bank's budget process was not designed to deliver resources for learning where they were most needed, with all Regions receiving the same notional share of budget for learning in their annual budget envelope and most of this budget distributed to and managed by front-line units. Over three-quarters of Regional learning resources were, *de facto*, not subject to Knowledge and Learning Board (KLB) review or included in Knowledge and Learning (K&L) Plans.

3. This report examines the alignment of staff learning with World Bank business priorities, and makes recommendations on how to improve alignment. The data analyzed in this report come from (a) interviews with a random sample of Regional unit managers, stratified by headquarters and country office and by Region, (b) a two-question survey of the staff of those managers, (c) interviews with Learning Coordinators from all Regions, all Network Anchors and designated other representatives on the KLB, (d) Learning Management System (LMS) records of all learning sessions for FY06 and FY07 as of May 1, 2007, (e) selected human resources' data regarding learning participants, (f) Regional Strategy and Performance Contracts for FY06 and FY07, (g) the World Bank Group Staff Survey of 2005, (h) K&L Plans for FY06, (i) quarterly staffing reports for FY06, and (j) background studies and reports.

4. The study concludes that staff learning is only partially aligned with corporate and Regional priorities, and that major revisions in current practices will be required to improve alignment considerably. The most essential will be to:

- subject staff learning to the standard World Bank business processes for Work Program Agreements;

- consolidate learning into major programs for Professional and Technical and Operational learning;

- focus on more tailored approaches targeted at different groups of staff; and,

- utilize the learning budget more strategically through formula funding, conditional cash transfers, reduction in fungibility, and revision of learning fiscal year.

5. It will also require some "quick fixes" to the LMS, to provide better user interfaces for essential information and facilitate better targeting of learning opportunities. A radical reform in terms of the governance of learning is also suggested.

1. INTRODUCTION

1.1 By the beginning of fiscal year 2006 (FY06), a combination of three conditions—the sophistication of middle-income country (MIC) counterparts, decentralization of the World Bank to over 100 country offices and increased reliance on newly hired, local (frequently junior) staff and consultants (table 1)—had created a situation whereby the highest performance risks in all Regions related to staff capabilities (appendix A).[1]

Table 1: High Regional decentralization and "juniorization" of staff, June 2005

	AFR	EAP	ECA	LCR	MNA	SAR
Regional offices (number)	39	13	27	19	9	8
All staff with < 3 years in Bank (%)	29	32.5	23.4	29.7	23.3	32.6
E-level staff with < 3 years in Bank (%)	38.4	40	23.6	38.8	9.6	55.1

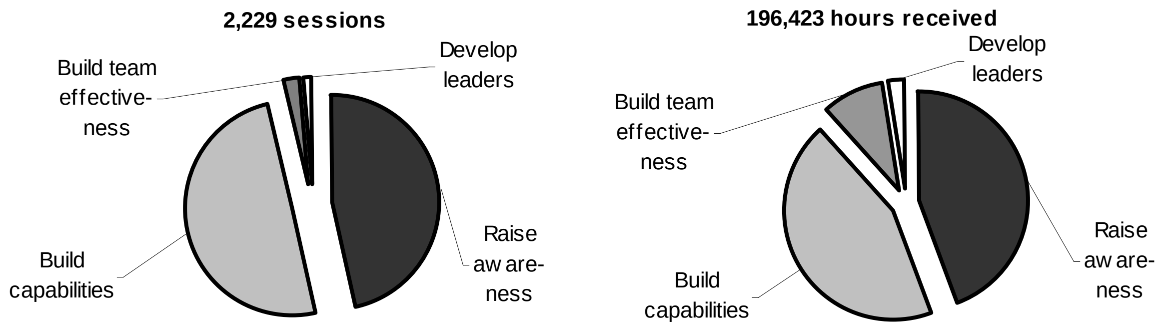
Source: IBRD Quarterly Staffing Report, FY04 Quarter 4

1.2 Regional Managers expressed concern about shortcomings in staff professional and technical expertise, absence of sensitivity to country context and political economy, and lack of practical operational and implementation knowledge. *Yet nearly half of observable learning opportunities offered to and received by Regional staff in FY06 were not aligned with these priorities, having instead the objective of raising awareness rather than building key skills* (figure 1).[2]

1.3 Compounding this and despite the recognized efforts of many Regional and Strategic Learning Center (SLC) learning coordinators, formal internal staff learning remained a low priority with front line managers. Consensus among managers is that the best learning comes from interaction with peers and the mentoring of junior staff by senior staff, particularly in the field. Managers also report that senior staff are best served by external learning opportunities that maintain their professional and technical expertise. Unit budgets for learning, however, are typically insufficient to support much peer learning, senior staff on-the-job mentoring of junior staff, or external professional and technical learning.

[1] As reported in FY06 and FY07 Regional Strategy and Performance Contracts (SPCs)
[2] Observable learning opportunities are those recorded in the Learning Management System (LMS).

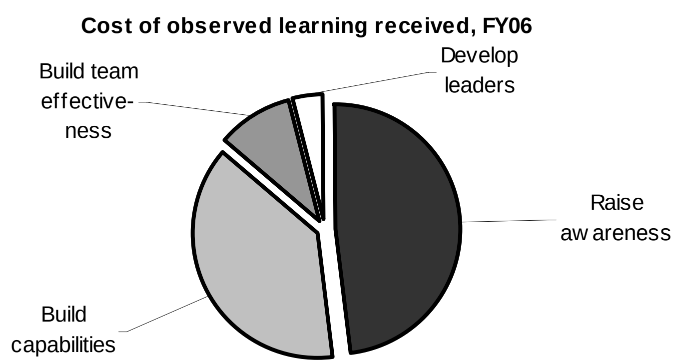
Figure 1: Nearly half of staff learning sessions and hours of learning received by Regional staff in FY06 were for raising awareness rather than building staff capabilities[3]



Source: Authors' analysis of LMS data for FY06

1.4 The Bank's budget process is not designed to deliver resources for learning where they are most needed. All Regions receive the same notional share of budget for learning in their annual budget envelope, without regard to need. Charges against this budget can include Regional management of learning, creation and delivery of learning, and participation in learning (learning received). Resources for knowledge are managed separately. Approximately half of the observable costs for learning received are directed to raising awareness (figure 2).

Figure 2: More learning resources for raising awareness than for building capabilities[4]



Source: Authors' analysis of LMS data for FY06

[3] In FY06, 2,832 sessions (including internal, external and on the job-learning) were recorded in the LMS. Out of them, 2,229 sessions (79 percent) were attended by at least one Regional staff member. All World Bank employees received 425,574 hours of learning, of which 196,423 hours (46 percent) were received by Regional staff members with regular, open and fixed term contracts.

[4] Observable costs of learning received are those imputed to observable learning sessions on the basis of session duration and the average hourly wage rate of participants; they do not include development or delivery costs. For FY06, $3,882,151 was spent on raising awareness and $3,074,558 was spent on building staff capabilities. The report's data include Brown Bag Lunches (BBLs) recorded in the LMS. Excluding BBLs, the distribution of learning received (in hours and in cost) among raising awareness, building individual staff capabilities, building team effectiveness and developing leaders, remains equivalent.

1.5 The remainder of this report elaborates on these conclusions and offers two sets of actionable recommendations: one set that the Knowledge and Learning Board (KLB) could implement independently and a second set that would require the agreement of the Resource and Performance Management Department (CSRRM). A third recommendation, a radical reform of learning governance, is also described.

2. DETAILED ANALYSIS OF ALIGNMENT

2.1 We look for alignment in three dimensions: between Regional priorities and Regional Knowledge and Learning Plans, between these plans and observed learning, and between observed learning and Regional priorities. The two main sources for information about Regional priorities are the Regional Strategy and Performance Contract (SPC) and our interviews with a random sample of managers selected from country offices and headquarters, who were asked to comment on the written document and provide their own observations.

Data sources

2.2 Data analyzed in this report come from (a) interviews with a random sample of Regional unit managers, stratified by headquarters (HQ) and country office (CO) and by Region, (b) a two-question survey of the staff of those managers, (c) interviews with Learning Coordinators from all Regions, all Network Anchors and designated other representatives on the KLB, (d) Learning Management System (LMS) records of all learning sessions for FY06 and FY07 as of May 1, 2007 attended by staff working in Regional VPUs, (e) selected Human Resources' (HR) data regarding learning participants, (f) Regional Strategy and Performance Contracts (SPCs) for FY06 and FY07, (g) the World Bank Group Staff Survey of 2005, (h) Knowledge and Learning (K&L) Plans for FY06, (i) quarterly staffing reports for FY06, and (j) background studies and reports (see appendix B for list of documents consulted).

Table 2: Population, samples and response rates for selected data sources

	Population	Sampled or designated	Respondents	Response rate
Regional unit managers	279	24	23	96%
Staff of Regional unit managers	4,964	457	299	65%
Learning Coordinators/KLB Members	23	18	17	94%
LMS learning sessions attended by at least one Regional staff member[5]	2,229	2,229	n.a.	n.a.

Source: Authors

Regional Strategy and Performance Contracts identify staff skills as risk

2.3 We examined Regional SPCs for FY06 (spring 2005) and FY07 (fall 2006), to obtain an indication of Regional priorities, and—more importantly—the risks for achieving these priorities as perceived by Regional management around FY06. In all

[5] The study focuses on learning of Regional staff for two reasons: they represent the core business of the Bank, and they comprise over 50 percent of staff.

six Regions, indicators of staff skills were rated as serious risks (defined as the impact of the risk multiplied by its likelihood on scales of 1-9) for achieving Regional objectives (see appendix A for details). For AFR, ECA, and SAR, no category was given a higher risk rating than "staff skills and mix" (72, 56 and 56, respectively). For all six Regions, indicators of "agility" (competitive positioning, responsiveness to global developments, readiness for crisis assistance) were given risk ratings over 45. For AFR, EAP, and SAR implementation skills (reliable procurement, disbursements, implementation management, Trust Fund compliance, managing of projects with complex safeguard issues) were rated 56 and in LCR implementation was rated over 45; only in ECA were implementation issues not rated as risks. To place these ratings in context, in LCR, MNA and SAR workplace security issues were accorded high risk ratings (56, 63 and 56 respectively), and in LCR and MNA these issues were paramount.

2.4 In general, the interviewed managers agreed with the strategic priorities and the performance risks as identified in the Regional SPCs. All interviewed HQ managers and half of interviewed CO managers mentioned concerns related to shortcomings in staff skills, in three main areas: (a) professional and technical (P&T) expertise, including sensitivity to the political economy of the country and ongoing global issues, (b) practical operational knowledge, including project implementation skills, and (c) communications skills and country knowledge needed for being effective on the ground (table 3).

Table 3: Priorities for staff learning as identified by Regional managers

	AFR	EAP	ECA	LCR	MNA	SAR
P&T knowledge (Advanced)	✓	✓	✓	✓		✓
Operational skills (including procedures, policies)	✓	✓	✓	✓		✓
Communications skills	✓	✓	✓	✓	✓	
Knowledge transfer (OECD to MICs, MICs to LICs)		✓	✓	✓		✓
Political economy		✓		✓		✓
Country and cultural knowledge		✓	✓		✓	
Operations implementation (including reforms)	✓			✓		✓
P&T knowledge (Introductory)	✓					✓
Governance and anti-corruption	✓					✓
Cross-regional experience	✓			✓		

Source: Authors' analysis
Note: This table represents a summary of 23 confidential interviews and the checks indicate whether or not a particular topic was mentioned; no statistical tests of differences were made and no statistical significance is implied by the check marks.

2.5 With respect to professional and technical expertise, Regional managers observed that senior staff working in middle-income countries (MICs) are often no better informed on issues than their sophisticated counterparts, who may have attended the same graduate programs in the United States or Europe as attended by Bank staff.

In AFR and SAR, managers reported that junior staff needed basic sectoral learning. Staff in LCR and AFR were seen as lacking in cross-regional experience; managers viewed LCR staff as "insular" and staff in AFR as being "stuck" in the Region. In both Regions, managers observed that clients could be better served by learning from country experience outside the Region. In particular, knowledge and skill transfers from MICs whose experience could be adapted to the low-income countries (LICs) and from OECD countries whose experience could be adapted to MICs, would be valued in several Regions.

2.6 On the operational side, the principal observations were that countries value knowledge about "how to do" rather than "what to do," and that junior task team leaders (TTLs) lacked this practical knowledge, particularly about how to implement reforms. In addition, managers noted that CO staff were less well socialized into Bank practices and culture and often lacked the full range of Operational skills.

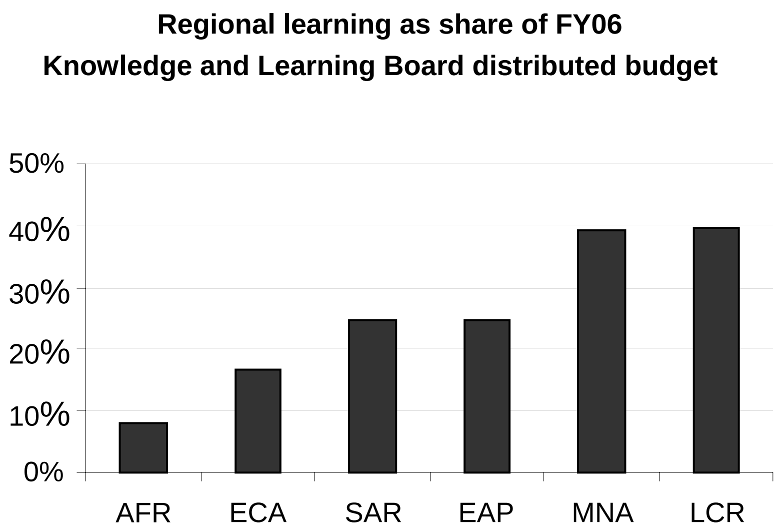
2.7 Communication skills were consistently identified by CO managers as an issue. They reported that some international staff lacked country knowledge and cultural sensitivity, including the "soft skills" needed in MNA. The ability to deal with the political economy was identified as a learning need in EAP, LCR, and SAR. Junior TTLs, in particular, were identified as "too green" to engage in dialogue with governments; they were viewed as technically proficient but lacking in knowledge of the political economy of the country. In some Regions, the international language skills (principally spoken and written English) of local staff were weak.

FY06 Regional K&L Plans lack specificity about learning programs

2.8 No discussion of Regional K&L Plans can begin without a discussion of the budgets that support these plans. Budget allocations for learning are not strategic. All Regions receive the same notional budget share for learning (approximately 3.9 percent) and most of this budget is distributed to and managed by units. Over three-quarters of Regional learning resources are, *de facto*, not subject to KLB review. Staff and managers drive the bulk of learning in the Regions, and K&L Plans play a small role.

2.9 Regional K&L Plans seem to apply only to the share of the Regional K&L budget that is managed by the Regional Learning Coordinator (RLC), which for FY06 ranged from less than 10 percent in AFR to nearly 40 percent in LCR and MNA (figure 3). For ECA the share was 17 percent, and for EAP and SAR it was 25 percent. This amount included resources for the RLC (salary, travel, support, and in some cases evaluations) and to underwrite Regional learning activities including staff travel (in SAR); staff-initiated "skills development grants" (in ECA); cross-sectoral, task or country teams (LCR, ECA, MNA, SAR); and mentoring or coaching programs (in LCR, EAP, ECA, MNA). In several Regions staff or units competed for resources. The remainder of the learning budget, identified in the K&L Plans for "individual learning" (or "unallocated"), was typically distributed to units and managed by unit managers. In all, therefore, 22 percent (about $7 million) of the Regional learning budget was subject to KLB review and/or authorization.

Figure 3: Regions vary widely with respect to the share of the learning budget retained for Regional learning



Source: FY06 Regional Knowledge and Learning Plans; FY06 Annual Report on Learning

2.10 Consistent with their control of 60-90 percent of the Regional learning budget, unit managers view their staff and themselves as primarily responsible for determining how knowledge and learning resources are used, and note that most decisions regarding resource use are in response to staff initiatives (appendix C). Indeed, managers—other than those with direct involvement in Regional Learning Committees—do not view the Regional Learning Coordinators as influential with regard to staff learning. Managers report interest in distributing resources "fairly" and often establish unit learning committees to decide on the use of the unit-level learning budget, which is small, averaging $40,000-$100,000 depending on the number of staff. Some managers note that staff travel associated with periodic sectoral events held in Washington (e.g., PREM Learning Forum, Financial Management – Fiduciary Forum) use all their variable cost budget for learning. Managers of small remote COs view the learning budget as insufficient, particularly to cover travel to Washington or Regional hubs for learning, whereas CO managers in hubs (such as Bangkok) view staff time as a major impediment to learning. HQ managers also view staff time, rather than budget, as a concern.

2.11 In determining how to use the FY06 budget, Regional Learning Coordinators undertook serious efforts to develop K&L Plans in coordination with Regional Management Teams (RMTs). This involved staff surveys, one-on-one meetings with staff, meetings with Country and Sector Directors and Managers, reviews of staffing by unit, reviews of past learning of staff and the active involvement of Regional Learning Committees. In Regions where the Regional Learning Coordinator was a member of the RMT, this process was facilitated by regular contact with members of the RMT.

2.12 Clarifying alignment between the resulting plans and Regional strategies and performance risks is difficult, because the descriptions of the strategic focus/priority areas for Regional FY06 K&L Plans are typically comprehensive, but rarely indicate detailed content for the learning program. Rather, lists of anticipated courses are provided, and in many cases, only the modality of learning, rather than its content, is described (see table 4 for examples). One exception to this observation is the reference to building team effectiveness, which occurs in all K&L Plans. Moreover, the K&L Plans are viewed as "living" documents, subject to change as the fiscal year progresses and responsive to unanticipated requests from managers.

Table 4: Summary of FY06 K&L Plans' strategic focus/key priority areas

Region	Strategic focus/key priority areas
AFR	[no text] List of 50 learning activities.
EAP	"Continue to provide delivery of core programs to country office staff…complement face-to-face course delivery at HQ, country offices and the Bangkok hub with an increasing number of workshops, short modules and distance learning…continued focus on teams and team leaders…implement an operations course…place greater attention on on-the-job-learning…explore the use of e-learning…implement the advanced operations and leadership course for managers…" List of 50 learning activities.
ECA	"We are focusing on the skills mix in our strategic staffing effort, retooling staff skills, including by learning from other Regions and Part I best practice institutions, and building stronger teams." List of 72 learning activities.
LCR	"…provide maximum support to staff on the front-line, by equipping them with strong operational, client engagement and team skills, maintaining a high level of awareness of developments on the cutting edge, and providing strong managerial and administrative support." List of 75 learning activities.
MNA	"…continued Regional delivery of Field Orientation workshops and of Introduction to Bank Operations…five-day workshops tailored to the needs of field office and HQ staff…allocate a significant amount of resources for…supporting operational team efficiency…" List of 26 learning activities.
SAR	[same as EAP] List of 69 learning activities.

Source: FY06 Regional Knowledge and Learning Plans

2.13 K&L Plans for FY06 did not consistently indicate how learning resources were to be allocated across priorities or activities, and most of the activities listed in the plans did not have costs associated with them. For example, the AFR plan called for $9.6 million for learning, including $780,000 reserved for Regional activities, of which the lion's share ($700,000) was allocated to the Regional operational learning course, Assuring the Quality of Bank-Assisted Operations in Africa. The rest ($8.9 million) was designated as "unallocated" and apparently programmed at the unit level.

2.14 Many weaknesses in the FY06 K&L Plans were to have been repaired in FY07, and these comments apply only to the FY06 plans. What is clear, however, is that the Regional learning programs only partially addressed the risks identified in the SPCs and further elaborated by the Regional managers. As an example, implementation of operations was notably absent from the list of SPC performance risks in ECA, and managers emphasized the need for new, cutting edge P&T skills and expertise. Yet about one-third of the Regional learning budget was allocated to courses devoted to operations and project implementation, for which only half the expected participants showed up, suggesting a supply that was not aligned with demand. By comparison, a well-regarded learning program on a new P&T topic, "Regional development," was oversubscribed, with nearly 350 participants.

A glass half full: Learning received is only partially aligned with corporate priorities

2.15 The literature identifies four major objectives of staff learning: raising staff awareness, building individual staff capabilities, building team effectiveness and developing leaders (Lockheed and Arango 2005). In the World Bank, typical activities to build awareness include the orientation program for new staff, sector forums and professional and technical (P&T) brown bag lunches. Activities to build staff capabilities include formal courses such as Fundamentals of Bank Operations, and other non-course approaches, such as on-the-job training or mentoring. Team effectiveness is built through programs that directly support teams, such as the Multi-sectoral Team Learning Program. Leaders are developed through formal courses and coaching. Regional SPCs and managers emphasize the importance of building staff capabilities for carrying out operational responsibilities and for engaging in professional and technical dialogue with clients.

2.16 Analyses of the observed learning received by all Regional staff in FY06 find that the learning sessions received by Regional staff were only partially aligned with the Regional risks and weaknesses in staff skills as identified by managers (see appendix D for observed learning hours for specific topics). Specifically, the following suggest misalignment:

- *Nearly half of learning received was for raising awareness* (accounting for 46 percent of learning sessions and 44 percent of total observed learning hours).

- *About half of learning received had the objective of building staff capabilities* (50 percent of sessions and 44 percent of observed learning hours).

- *Building team effectiveness was the objective of less than 10 percent of learning* (3 percent of sessions and under 10 percent of learning hours).

- *Most activities designed to build staff capabilities were not differentiated according to level* (introductory, intermediate, advanced) to facilitate appropriate targeting of staff.

- Very little learning to build staff capabilities related to the corporate topic of *governance and anti-corruption* (less than half a percent of learning hours).

- Very little learning focused on other Regional priorities; only a few recorded sessions dealt with issues of *political economy*, and none dealt with issues of "*agility*" in responding to changes in country conditions or requests from governments.

2.17 In other respects, however, learning was well aligned with corporate priorities.

- *Nearly half of learning for building staff capabilities focused on Bank operations skills* (41 percent); the remainder focused on professional and technical skills (21 percent), communications skills (17 percent), IT skills (14 percent), resource management skills (4 percent), and other various skills (3 percent).[6]

- *Among Bank operational skills,* the most frequently learned involve procurement and portfolio management.

- *Among professional and technical skills,* the most frequently learned involve monitoring and evaluation and economics.

- *Learning activities received by country office staff are more likely to focus on building staff skills* and less likely to focus on raising awareness, and are *twice as likely* to focus on building *operational skills,* as compared with learning activities received by headquarters staff (see appendix E for details).

- *Ethics is a major topic of learning for raising awareness.* Ethics awareness comprises 8 percent of learning for raising awareness; only rural development and procurement receive more hours of learning.

- *Governance/anti-corruption is a topic of learning for raising awareness,* accounting for nearly 3 percent of learning hours received for raising awareness.

[6] Communication skills include country knowledge and cultural sensitivity, ability to deal with the political economy, engaging in dialogue with clients, conveying messages effectively and written and spoken language skills (including English).

3. WHAT ACCOUNTS FOR THE GLASS HALF EMPTY?

3.1 Misalignment may arise from the governance of learning; difficulty staff and managers face in obtaining information about the quality, relevance and availability of learning opportunities; the weakness of the LMS for use as an accountability tool; failures of staff to register some team and individual learning in the LMS; and other impediments as identified by managers and prior studies.

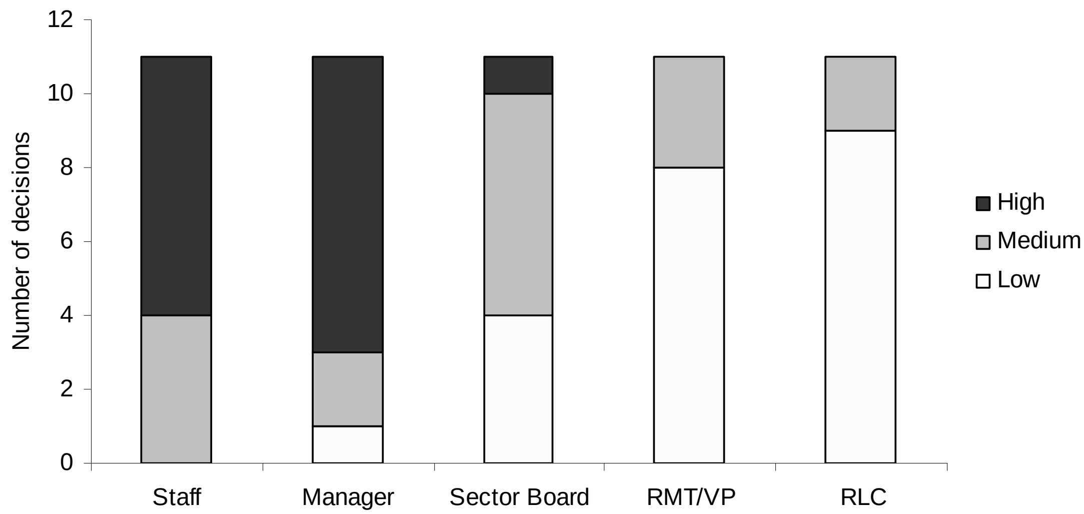
Governance of learning is multi-layered and transaction intensive

3.2 Governance of staff learning is complex and inconsistent across Regions in terms of organizational form, strategies used to identify staff learning needs, and degree of cooperation with other Regions and SLCs. A visible difference among the Regions is the seniority of the "learning coordinator" and his or her organizational proximity to the Regional Management Team (RMT) or Vice President's (VP) office. ECA's Regional Learning Coordinator (RLC) reports directly to the VP, EAP's RLC reports through one administrative level, while the RLCs in AFR, LCR, MNA and SAR report through at least two levels of administration (see appendix F). Moreover, multiple learning committees operate within Regions, typically beginning at the unit level and culminating at the level of the VPU front office. In addition, Regional sector managers and directors serve on sector boards and councils, respectively, which authorize sector learning programs.

3.3 While RLCs strive to ensure alignment of learning with corporate priorities at least on the portion of the budget that they oversee, managers in all Regions attribute to themselves and their staff the greatest influence over the production and utilization of learning opportunities, with Sector Boards being a distant second for all but advisory services (figure 4 and appendix C).

3.4 Standard procedures for identifying staff learning needs and ensuring that learning responds to these needs are lacking. RLCs engage in a wide range of approaches for identifying learning needs. Strategies mentioned by RLCs include (a) conducting "needs assessments" via surveys and one-on-one meetings with staff, (b) reviewing corporate priorities such as "governance and anti-corruption" or "results" and focusing on these areas, (c) reviewing human resources' data to focus on new local staff with orientation and operations courses, (d) reviewing the staff survey results, (e) meeting with Regional directors with lists of new staff that have not received training, (f) consulting with the Operations Policy and Country Services vice presidency (OPCS) on operational learning, and (g) creating a database on all Regional staff and training received. These strategies are used in various combinations.

Figure 4: Managers view themselves and their staff as influencing most of 11 observed decisions about the creation, dissemination and use of knowledge and learning



Source: Authors analysis; see appendix C.

3.5 Cooperation between Regions and other SLCs varies considerably across the Bank. RLCs attributed lack of cooperation to (a) the number of units that "own" certain topics (e.g., governance, results, evaluation), (b) the absence of a formal coordinating mechanism including some means for sharing "visibility" for learning, (c) personalities and "ownership" by certain Regional staff of certain topics, and (d) differences among Regions with respect to importance of various topics. Successful examples of cooperation were mentioned, particularly for cross-regional cost sharing on specific topics.

Identifying good available learning opportunities can be difficult

3.6 Numerous learning opportunities are advertised daily to managers and staff alike. Faced with this amount of information, some managers expressed the need to know which learning opportunities—internal or external—would be valuable to their staff. To reduce the amount of messages and help staff plan their learning, some groups (e.g., Asia Learning, Information Solutions Network) advertise events monthly. Nevertheless, the large volume of messages offering learning opportunities impedes strategic choices.

3.7 Given the abundance of learning opportunity information, a good Learning Management System is needed to help managers, learning coordinators, and staff make strategic decisions about learning. However, searching activities in the LMS can be cumbersome and misleading. Getting a calendar of upcoming events sorted by dates is not possible. Additional issues with the search functions of the LMS are described in appendix H.

The LMS is an inappropriate tool for accountability

3.8 As a tool for accountability, the LMS is not viewed positively by either managers or learning coordinators. It is viewed as "user-unfriendly" and as a consequence it remains an underutilized tool. Comments were decidedly negative. Managers and learning coordinators cannot easily extract the training history of staff. They rely on the KLB secretariat to provide data that they want to query on their own for just-in-time use. Once provided, the data are often seen as too unreliable to be used. Appendix H details issues that make the LMS a poor accountability tool.

3.9 The LMS has earned such a poor reputation as an accountability tool that some managers and learning coordinators try to avoid using it. In response to the shortcomings of the LMS, some Regional Learning Coordinators have even established their own local database to provide them with the staff learning information they need, such as the training history of staff in their Regions, and to monitor the learning budget.

Some learning is not recorded

3.10 Some observed misalignment may be due to failures in registering learning in the LMS and in constraints imposed by higher managers. One indication that learning is not recorded adequately is that it is difficult in the LMS to account for the entire Regional budget allocation (table 5).

Table 5: Unexplained KLB Regional budget allocation, FY06

	Item	Cost	Source
(a)	Budget allocation, all Regions	$32,421,000	FY06 KLB Annual Report
(b)	Staff time cost of learning (imputed)	$7,678,364	LMS staff participant hours multiplied by net market rate of participants
(c)	Regional consultants, temporaries and JPAs participation cost[7]	$1,279,684	LMS participant hours of consultants, temporaries and JPAs multiplied by their rate
(d)	Travel cost charged to all Regions for training received	$5,604,011	SAP FY06 Travel Expense/Forecast Report
(e)	Staff travel time to and back from the training[8]	$3,438,613	16 hours multiplied by net market rate of participants
(f)	Learning development and delivery	$7,400,000	FY06 KLB Annual Report
(g)	a – (b+c+d+e+f)	$7,020,328	Unexplained

Source: See table

[7] Consultants, temporaries and Junior Professional Associates (JPAs) were excluded from our main analysis. However, in table 5 to provide a conservative estimate of the unexplained budget allocation we included them as follows. For short-term consultants and temporaries, LMS participant's hours were multiplied by the participant's actual hourly wage rate. For extended term consultants and temporaries, we applied the distribution by grade group of the regional staff to impute their participation costs. For JPAs, we used the net market reference point-hourly wage rate of Grade D staff.

[8] When the country of delivery of a face-to-face learning session was different from the country of duty of the staff member, we assumed that the staff member spent two days (16 hours) traveling for this learning session. To compute the cost of this traveling time, we multiplied the net market reference point-hourly wage rate by 16.

3.11 In table 5, the imputed staff time cost of learning recorded in the LMS accounts for approximately 24 percent of FY06 allocation and an additional 4 percent could be explained by the time of temporaries, consultants and Junior Professional Associates (JPA) assuming that they were paid for attending the learning sessions. The cost of participants' travel and the estimated cost of participant staff travel time to and back from the training account for 17 percent and 11 percent respectively. Another 23 percent correspond to the Regional learning development and delivery costs. This analysis leaves a conservative estimate of 22 percent of the budget allocation to all Regions unexplained, possibly in part a consequence of failures in recording participation.

3.12 Participation under-recording is particularly relevant to peer learning. Managers observed that on-the-job learning from more knowledgeable and experienced peers is universally valued; they provided several examples. Staff agreed (appendix G); among staff surveyed, 46 percent reported that they learned on the job from a colleague and/or had participated in a group peer learning program; this was second only to reading a study, operational guide or knowledge website (49 percent). This learning is often not captured in the LMS; for example, only 9 percent of the same staff had their peer learning recorded in the LMS.[9] In addition, some types of team learning organized at the country office unit level, including "retreats" or "study tours" to visit projects under implementation, were administratively curtailed, according to several managers.

What managers see as impediments to learning

3.13 Misalignment may be due to constraints on Regional staff. Country managers identified three main impediments for learning: (a) distance (in time zones and travel time) between the CO and HQ or Regional hubs, (b) demands on staff time for operational work, and (c) in a few cases, staff lack of familiarity and comfort with distance learning (e-learning and video-conferencing). Budget was rarely mentioned as a defining impediment, although it was an issue in three cases. First, small, remote COs found that the unit budget for learning was too small to allow for much staff travel. Second, for the years in which major sectoral events (such as sector forums) occurred, travel budgets for sectoral staff were viewed as insufficient. Third, budgets were generally viewed as insufficient for obtaining senior level staff (or retiree) mentors for junior TTLs.

3.14 Another source of misalignment may come from staff motivation for learning. Staff ratings for learning sessions are generally positive, but relatively low with respect to relevance to their present job (Ling, Dasgupta, and Yenice 2006). It may be that career development rather than job performance is the main incentive for learning.

[9] The period observed in the survey and the corresponding LMS data cover FY06 and the first ten months of FY07.

4. RECOMMENDATIONS

4.1 Alignment of staff learning with corporate and Regional priorities can be considerably improved with a number of major revisions in current practices. The most essential will be to subject staff learning to the standard Bank business processes for Work Program Agreements, consolidate learning into major programs, and focus on more tailored approaches targeted at different groups of staff. It will also require some LMS fixes, to provide better user interfaces for essential information and facilitate better targeting of learning opportunities. A radical reform in terms of the governance of learning is also suggested.

4.2 The following "basket" of learning, tailored to staff job responsibilities, would improve learning alignment with Regional corporate priorities:

- For ACS and local staff, continuous updating on Bank operational skills (portfolio management, procurement, etc.) and Bank policies, largely through e-learning

- For junior task team leaders (TTLs), (a) coaching by senior staff on political economy and project implementation, within the country context, (b) a standard TTL learning program (expanding on Fundamental of Bank Operations) across Regions, and (c) introductory P&T learning through sectoral "flagship" courses or externally provided courses

- For senior experts, particularly for those working with MIC clients, professional expertise enhancement through external learning

- For international staff moving to COs, pre-departure learning on country and culture.

4.3 The challenge is how to achieve this "basket" in the absence of clear budget authority and incentives for implementation or compliance. The following recommendations include those that can be achieved without changes in budget management as well as those that would require coordination with Resource and Performance Management Department (CSRRM).

Actionable recommendations not requiring changes in budget management

4.4 The following are recommendations that the KLB could decide to implement independently.

KLB actions to improve targeting and alignment of learning

- Eliminate "open enrollment" for most face-to-face learning opportunities other than BBLs.

- Use LMS and HR data to identify staff movement (from HQ to CO, CO to HQ, from one position to another) and provide staff, managers and RLCs with a list of learning aligned with the requirements of the new position.

- Target junior task team leaders for TTL learning and sectoral P&T courses (including "canned" courses and those provided outside the Bank).

- Schedule longer formal courses for the first two quarters of the fiscal year.

KLB actions to improve business processes for learning

- Improve transparency, by (a) sending a Learning Dashboard to Regional VPs to document learning received and resources spent, and (b) sending summary unit data on learning received and resources spent to managers and staff of Regional units and to the Regional Learning Coordinator.

- Follow the World Bank's standard business processes for review and approval of learning programs, i.e., concept note, review meeting, Work Program Agreement (WPA).

KLB actions to improve P&T skills alignment with business priorities

- Differentiate courses by level, i.e., basic, intermediate, and advanced. (OPCS does this already in their "roadmap.")

- Identify new learning opportunities for advanced P&T (through partnerships with universities, think tanks, etc.); RLCs could identify decentralized opportunities and Network Anchors could identify international opportunities.

- Commission a study group to examine how to respond to learning needs on "political economy" and country context.

KLB actions to improve operational skills alignment with business priorities

- OPCS and the Learning Support Group should expand the number of short, online or CD-ROM based courses for specific operations skills (procurement, supervision, disbursement, etc) with regular (at least annual) updates to keep current with operational requirements. (Financial Management does some of this already.)

- Establish a "Senior Operations Specialist" fund to support on-mission mentoring of junior TTLs by senior TTLs (possibly those 60 or older).

- Establish peer learning and mentoring awards as incentives.

- Load non-course/event learning tools into the LMS (e.g., self-assessments, checklists, etc).

KLB actions to make the LMS more user-friendly (Appendix H details all LMS recommendations.)

- Create user-friendly search tools and reports to provide unit managers with information on staff learning history and plans.

- Create user-friendly interfaces for staff to easily find relevant learning opportunities and sort them by dates.

KLB actions to use LMS more strategically

- Send managers (with copy to the RLC) a quarterly email list of their staff with (a) their past learning received, (b) suggestions for their next learning, linked to upcoming events, (c) links to the unit's manager reports to enable autonomous just-in-time monitoring, and (d) links to tutorials for managers and staff to find and enter information in the LMS.

KLB actions to improve LMS data

- Better define the target audience by (a) replacing the field "grade groups" and "HR manager flag" with "function," (b) adding "intact team" versus "individual" learning, and (c) specifying CO/HQ target differently.

- Better define the activity content by (a) mandating the completion of the "learning objectives" field in a structured results-oriented format, and (b) differentiating all activities by difficulty levels (i.e., introductory, intermediate, and advanced).

- Capture in the LMS sessions that would otherwise be unrecorded, by enabling learners to add sessions that they attended but that were not recorded in the LMS, thereby creating a flag prompting the retrospective entry of sessions in the LMS.

- Add a field to the LMS to identify peer learning or mentoring providers (name of staff).

- After fixing the LMS, communicate all improvements to users to rebuild their trust in using the system's data.

Actionable items requiring agreement of CSRRM

4.5 The following recommendations should help improve the strategic use of learning budget. If the variable cost learning budget were managed by the Chief

Learning Officer's office (rather than included in each Region's budget envelope from CSRRM), alignment with corporate priorities could be improved. Some alternatives to consider are:

- *Formula funding of variable cost budget*: Allocate unit funding for learning based on a formula that takes into account such factors as (a) travel cost to HQ or Regional hub, (b) time zone distance and overlap with HQ, (c) internet connectivity speed at office, (d) access to GDLN/videoconferencing service, (e) share of new and/or junior staff, (f) number of peers in CO to provide peer learning, (g) country governance index, etc.

- *Conditional cash transfers:* Distribute budgets to units on the basis of quarterly performance measures based on observed staff learning participation in activities for which they match the target audience, up to the limit of the budget envelope.

- *Reduce fungibility of learning budgets by*: (a) limiting use of learning budgets to pay for staff participating in learning (allow limited use of Regional training development/delivery budget to adapt—not reinvent—programs, (b) limiting use of SLC budgets to design and delivery of learning (except for their units' budgets for staff learning), and (c) monitoring WPAs for compliance.

- *Change the fiscal year for learning:* A learning fiscal year aligned with the calendar year would reduce many of the time conflicts for staff and could impose greater discipline on learning providers to develop most learning in the first two quarters of the Bank's fiscal year. A first step is to develop an 18-month WPA covering fiscal year 2008 and calendar year 2008.

A radical reform specific to governance

4.6 A change in learning governance might be in order. This could involve the creation, in each Region, of a small "Learning Unit" (and Learning Manager) that would be responsible for staff learning and that would manage the entire Regional budget for learning (that is, the entire 3.9 percent received by Regions for this purpose). Learning deliverables would be organized into programs and segmented by targeted staff. Learning Units would follow standard budget procedures for monitoring the progress of these programs (e.g., identification, concept note review, draft review of learning content, delivery to country or sector client, evaluation, and implementation report). The scale of learning resources at the Regional level (an average of about $5 million per Region) would justify the creation of such small specialized units for learning. Activity Initiation Summaries (AISs) would be created in SAP for each learning program (not activity) with specific deliveries identified. Since the Learning Unit would manage the budget, the Regional managers would not have the incentive to use the learning budget for non-learning purposes or as rewards to staff.

4.7 Learning Units would serve as brokers, but would neither create nor deliver learning opportunities. Instead, Learning Units would enter into contracts with Country or Sector units to deliver a set of products that would be aligned with the country or sector strategies, and into contracts with Network Anchors, other SLCs or outside vendors to develop and deliver the learning sessions called for in the Country or Sector unit contracts. Since the Learning Units would not design or deliver learning, they would not have an incentive to use the learning budget to "reinvent the wheel," which should reduce the number of nearly identical learning offerings.

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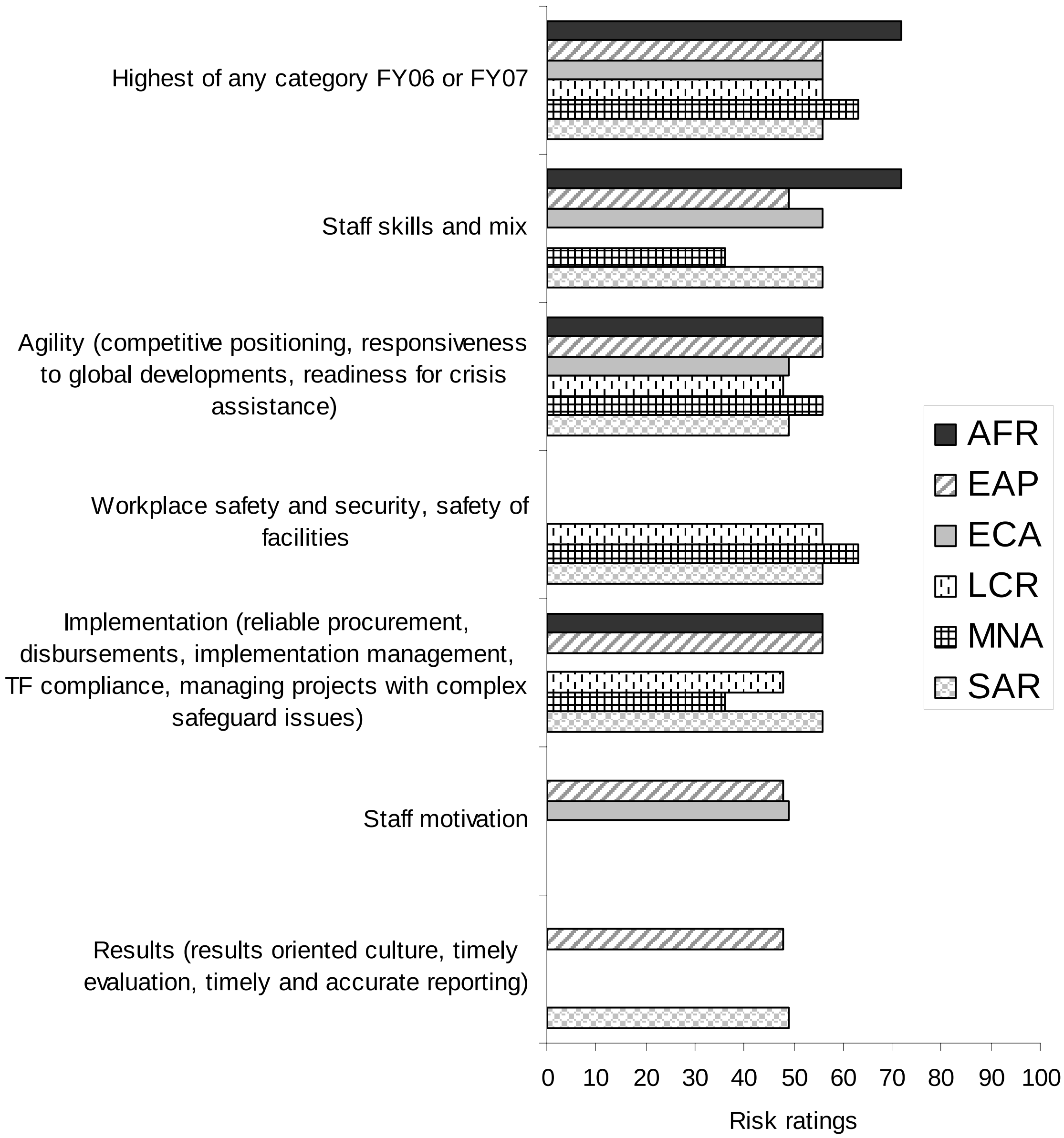
APPENDIX A: RISK ASSESSMENT, FY06 AND FY07 REGIONAL STRATEGY AND PERFORMANCE CONTRACTS



Note: Risk ratings are obtained by multiplying "potential impact" with "likelihood of adverse outcomes." Both risk elements are rated on an ascending 10-point scale. Thus, the highest possible risk rating is 100. In each category the chart indicates the highest risk rating between FY06 and FY07.

APPENDIX B: LIST OF DOCUMENTS CONSULTED

Building Staff Capacity for Development Results: Update on the Staff Learning and Knowledge Program FY06. Office of the Chief Learning Officer/ Knowledge and Learning Board, October 2006.

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FY06 Learning Plan, Latin America and Caribbean Region, (last modified on 9/1/05). Downloaded 5/10/07.

FY06 Learning Plan, Middle East and North Africa Region, (last modified on 8/16/05). Downloaded 12/27/06.

FY06 Learning Plan, South Asia Region, (last modified on 2/6/06). Downloaded 12/27/06.

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FY06 Strategy and Performance Contract, Environmentally and Socially Sustainable Development, (final as of 4/1/05).

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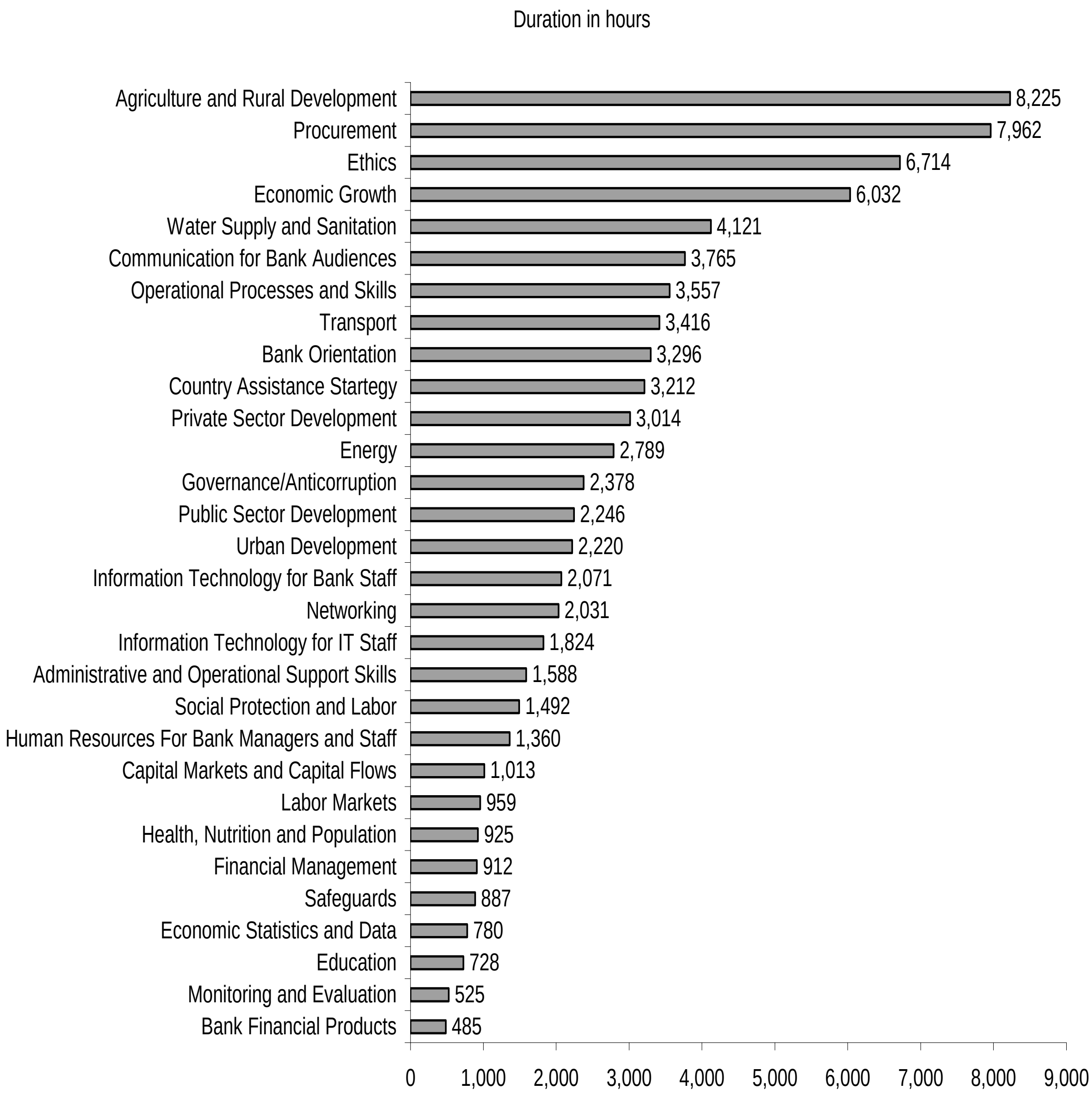
APPENDIX C: MANAGERS' ASCRIPTIONS OF DECISION-MAKING AUTHORITY FOR LEARNING (PRO-RATED VOTES)

K&L resource use for: / Decided by:	Staff	Manager or Director	Sector Board	VP/ Regional Manage-ment Team	Regional Learning Coordi-nator
Creating short learning activities (e.g., BBLs, short seminars)	High (17.7)	Medium (9.7)	Medium (5)	Low (2)	Low (0.7)
Creating courses (face to face or online) or workshops (½ – 10+ days)	Medium (4.5)	High (13.5)	Medium (7.5)	Low (1)	Medium (9.5)
Creating Advisory Services (e.g., help desks)	Medium (4.5)	Low (2.5)	High (14.2)	Low (1.2)	Low (0.7)
Creating knowledge products (e.g., discussion papers, toolkits, databases, video, debriefing)	Medium (7)	High (19)	Medium (9)	Low (1)	Low (1)
Creating knowledge storage and retrieval (e.g., creation of websites)	High (11.7)	High (10.7)	Medium (4)	Medium (5.7)	Medium (3)
Disseminating knowledge (e.g., presenting papers at conferences)	High (10.5)	High (15.5)	Low (1.5)	Medium (4.0)	Low (0)
Attending short learning activities (e.g., BBLs, short seminars)	High (32)	Medium (6)	Low (0)	Low (1)	Low (0)
Attending longer learning activities (½ – 10+ days)	High (17)	High (19)	Low (0)	Low (1)	Low (1)
Taking online learning (e.g., Fundamentals of Bank Operations)	High (25.5)	High (10.5)	Low (0)	Low (0.5)	Low (0.5)
Acquiring on-the-job learning (through cross-support, being mentored)	High (16)	High (20)	Medium (3)	Low (0)	Low (0)
Taking institutionally mandated courses (e.g., TLAP)	Medium (9.2)	High (18.2)	Medium (3)	Medium (4.2)	Low (1.5)

Note: Managers were asked "Who decides how Knowledge and Learning resources are used? Please indicate the MOST influential person or group and the SECOND MOST influential person or group for each decision listed below." Each manager was accorded two votes per decision (that is, no distinction was made between the most influential and the second most influential). Votes of managers who cast only one vote were doubled (e.g., if a manager voted for one decision maker, that decision maker was accorded two votes). Votes of managers who cast more than two votes were weighted by the inverse of the number of votes they cast (e.g., if a manager voted for four decision makers, each decision maker was accorded 0.5 votes (2/4)); "other" is omitted. High is defined as 10.5 votes or more; medium is defined as 3.0 < 10.5; low is defined as < 3. Three managers did not complete the question.

APPENDIX D1: REGIONAL LEARNING RECEIVED FOR RAISING AWARENESS (IN HOURS)

This appendix presents the number of hours of learning received by Regional staff members (with regular, open, or fixed term contract) in FY06 and recorded in the LMS for the topics that received over half a percent of the total number of observable learning.



Hours of Regional learning received for raising awareness by topic and Region

Topics	AFR	EAP	ECA	LCR	MNA	SAR	Total
Agriculture and Rural Development	2,065	2,165	1,165	1,315	683	832	8,225
Procurement	2,928	616	1,954	984	552	928	7,962
Ethics	2,536	6	272	242	64	3,594	6,714
Economic Growth	1,744	848	1,424	784	512	720	6,032
Water Supply and Sanitation	1,077	578	632	555	563	718	4,121
Communication for Bank Audiences	1,464	432	768	549	168	384	3,765
Operational Processes and Skills	593	615	908	116	334	992	3,557
Transport	1,245	489	582	394	173	532	3,416
Bank Orientation	768	800	368	608	104	648	3,296
Country Assistance Strategies	672	147	609	1,451	202	132	3,212
Private Sector Development	1,438	319	329	212	131	586	3,014
Energy	660	400	685	276	300	469	2,789
Governance/Anticorruption	182	953	524	60	42	618	2,378
Public Sector Development	859	424	596	88	160	120	2,246
Urban Development	486	252	966	258	12	246	2,220
Information Technology for Bank Staff	439	430	434	358	185	227	2,071
Networking	427	328	543	292	209	233	2,031
Information Technology for IT Staff	410	126	489	650	84	66	1,824
Administrative and Operational Support Skills	218	488	440	107	24	312	1,588
Social Protection and Labor	360	140	592	170	96	134	1,492
Human Resources for Bank Managers and Staff	400	80	720	80		80	1,360
Capital Markets and Capital Flows	62	235	259	227	77	154	1,013
Labor Markets	390	22	204	47	195	102	959
Health, Nutrition and Population	297	15	149	51	155	259	925
Financial Management	155	181	202	170	86	118	912
Safeguards	223	203	100	177	108	76	887
Economic Statistics and Data	304	70	200	72	40	94	780
Education	211	245	36	113	40	83	728
Monitoring and Evaluation	107	188	70	75	33	52	525
Bank Financial Products	91	48	99	154	58	36	485

Hours of Regional learning received for raising awareness by topic and grade group

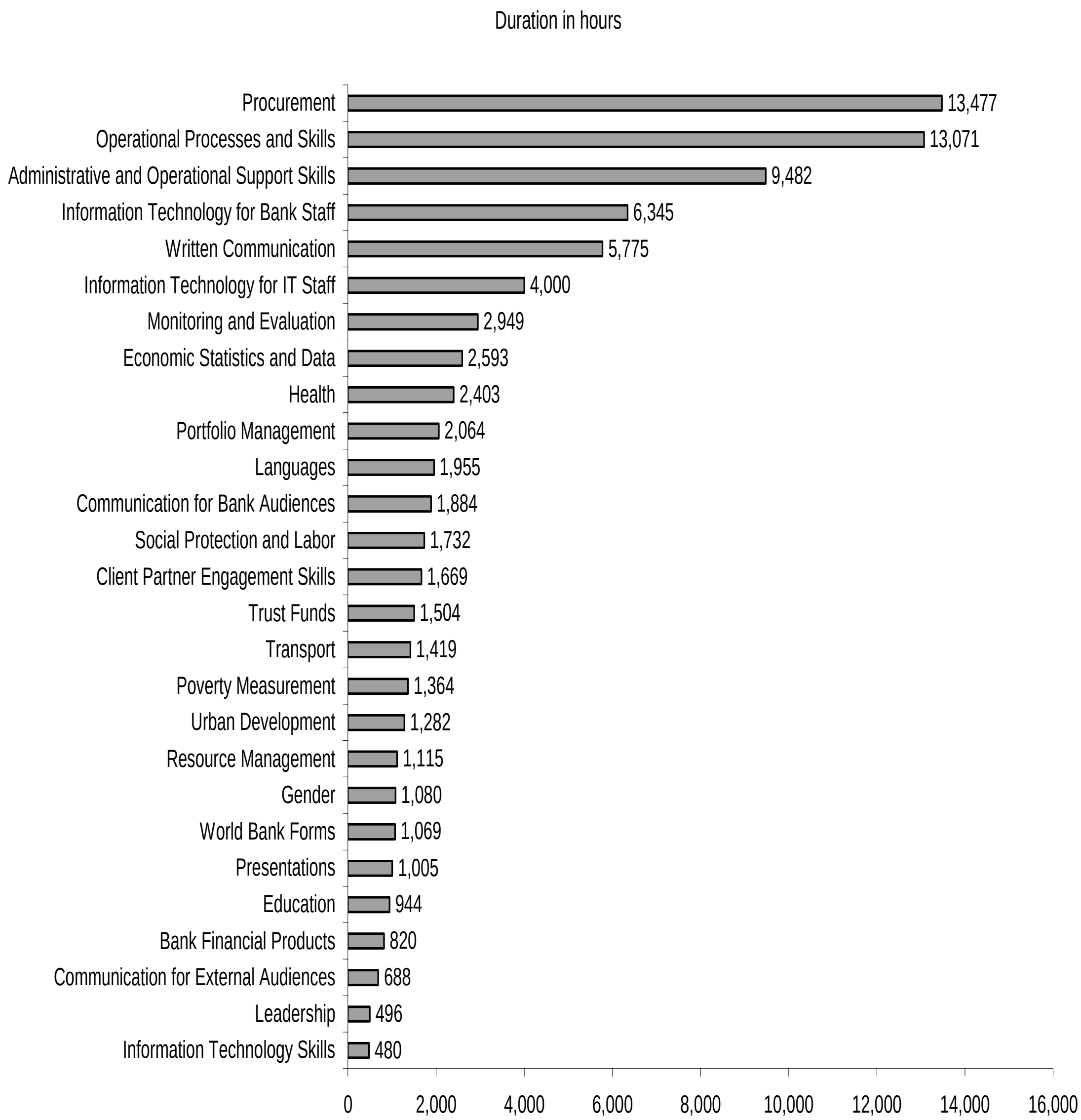
Topics	GA-GD	GE	GF-GG	GH+	Total
Agriculture and Rural Development	1,007	154	4,964	2,100	8,225
Procurement	2,836	976	3,526	624	7,962
Ethics	2,882	1,414	2,090	328	6,714
Economic Growth	192	352	3,904	1,584	6,032
Water Supply and Sanitation	74	260	3,085	703	4,121
Communication for Bank Audiences	1,317	840	1,560	48	3,765
Operational Processes and Skills	1,351	680	1,517	9	3,557
Transport	33	143	2,626	613	3,416
Bank Orientation	960	464	1,824	48	3,296
Country Assistance Strategies	480	830	1,690	213	3,212
Private Sector Development	194	104	2,273	443	3,014
Energy	98	173	1,916	603	2,789
Governance/Anticorruption	88	107	1,559	624	2,378
Public Sector Development	40	131	1,993	82	2,246
Urban Development	486	246	1,476	12	2,220
Information Technology for Bank Staff	767	154	1,014	137	2,071
Networking	1,525	274	198	35	2,031
Information Technology for IT Staff	787	515	522		1,824
Administrative and Operational Support Skills	1,533	51	5		1,588
Social Protection and Labor	9	17	1,268	198	1,492
Human Resources for Bank Managers and Staff	800	480	80		1,360
Capital Markets and Capital Flows	43	147	582	241	1,013
Labor Markets		5	919	35	959
Health, Nutrition and Population	138	5	736	47	925
Financial Management	4	16	715	177	912
Safeguards	195	72	551	69	887
Economic Statistics and Data	128	170	444	38	780
Education	9	20	527	172	728
Monitoring and Evaluation	9	42	344	130	525
Bank Financial Products	111	26	292	56	485

Hours of Regional learning received for raising awareness by topic and years in the Bank (as of December 31, 2005)

Topics \ Years in the Bank	0-3	4-10	11-20	21+	n.a.	Total
Agriculture and Rural Development	2,092	3,082	2,040	693	318	8,225
Procurement	2,064	3,278	2,060	488	72	7,962
Ethics	1,824	2,690	1,558	304	338	6,714
Economic Growth	1,904	2,304	1,120	336	368	6,032
Water Supply and Sanitation	1,216	1,590	923	170	222	4,121
Communication for Bank Audiences	1,824	1,398	315	57	171	3,765
Operational Processes and Skills	2,004	719	374	136	325	3,557
Transport	1,432	860	560	200	365	3,416
Bank Orientation	1,800	480	24		992	3,296
Country Assistance Strategies	1,912	570	212	238	280	3,212
Private Sector Development	1,139	1,150	612	64	50	3,014
Energy	652	1,115	530	194	300	2,789
Governance/Anticorruption	698	860	559	190	71	2,378
Public Sector Development	1,222	609	152	55	209	2,246
Urban Development	972	984	12		252	2,220
Information Technology for Bank Staff	545	742	370	158	256	2,071
Networking	243	825	505	418	41	2,031
Information Technology for IT Staff	492	862	216	184	72	1,824
Administrative and Operational Support Skills	830	305	136	32	286	1,588
Social Protection and Labor	725	418	251	47	51	1,492
Human Resources for Bank Managers and Staff	400	480	400	80		1,360
Capital Markets and Capital Flows	448	404	136	24	2	1,013
Labor Markets	337	548	68		6	959
Health, Nutrition and Population	303	442	156	3	21	925
Financial Management	361	399	94	52	6	912
Safeguards	294	309	180	20	84	887
Economic Statistics and Data	510	138	76	4	52	780
Education	189	352	156	28	3	728
Monitoring and Evaluation	155	176	92	49	53	525
Bank Financial Products	211	206	51	2	16	485

Note: The "years in the Bank" categories follow the breaks and labels provided by the LMS.

APPENDIX D2: REGIONAL LEARNING RECEIVED FOR BUILDING INDIVIDUAL CAPABILITIES (IN HOURS)



Hours of Regional learning received for building individual capabilities by topic and Region

Topics	AFR	EAP	ECA	LCR	MNA	SAR	Total
Procurement	4,957	1,600	1,612	2,145	1,894	1,270	13,477
Operational Processes and Skills	8,303	374	2,147	551	424	1,273	13,071
Administrative and Operational Support Skills	1,925	3,152	3,039	598	536	232	9,482
Information Technology for Bank Staff	1,237	1,040	2,347	802	835	85	6,345
Written Communication	1,441	1,324	1,104	564	124	1,219	5,775
Information Technology for IT Staff	1,906	668	946	684	152	124	4,480
Monitoring and Evaluation	638	184	966	593	343	226	2,949
Economic Statistics and Data	652	231	458	814	288	150	2,593
Health	1,240	320	112	443	288		2,403
Portfolio Management	96	32	1,056	144	728	8	2,064
Languages	421	15	68	1,301	150		1,955
Communication for Bank Audiences	688	96	252	584	216	48	1,884
Social Protection and Labor	722	160	247	42	240	320	1,732
Client Partner Engagement Skills	210	231	97	715	22	395	1,669
Trust Funds	352	320	268	104	76	384	1,504
Transport	604	195	228	124	64	204	1,419
Poverty Measurement	468	50	276	192	214	164	1,364
Urban Development	424	183	114	231	164	166	1,282
Resource Management	8		848	241	18		1,115
Gender				1,080			1,080
World Bank Forms	119	360		64	4	523	1,069
Presentations	263	312	244	63	64	59	1,005
Education	240	224	160	160	80	80	944
Bank Financial Products	260	64	176	144	64	112	820
Communication for External Audiences	120	320	48	72	112	16	688
Leadership	120	8	192	88	40	48	496

Hours of Regional learning received for building individual capabilities by topic and grade group

Topics	GA-GD	GE	GF-GG	GH+	Total
Procurement	3,339	1,911	7,790	437	13,477
Operational Processes and Skills	5,772	1,254	5,816	229	13,071
Administrative and Operational Support Skills	9,405	69	8		9,482
Information Technology for Bank Staff	3,761	1,625	928	32	6,345
Written Communication	2,341	650	2,678	106	5,775
Information Technology for IT Staff	2,228	1,906	346		4,480
Monitoring and Evaluation	366	350	2,019	215	2,949
Economic Statistics and Data	479	357	1,713	44	2,593
Health	280	80	1,803	240	2,403
Portfolio Management	160	576	1,248	80	2,064
Languages	446	343	1,165	1	1,955
Communication for Bank Audiences	360	336	1,084	104	1,884
Social Protection and Labor	80	40	1,490	122	1,732
Client Partner Engagement Skills	301	173	1,147	48	1,669
Trust Funds	304	112	956	132	1,504
Transport	67	44	1,248	60	1,419
Poverty Measurement	40	162	1,096	66	1,364
Urban Development	62	27	933	260	1,282
Resource Management	888	182	45		1,115
Gender			1,080		1,080
World Bank Forms	987	13	66	4	1,069
Presentations	626	76	303		1,005
Education			944		944
Bank Financial Products	24	16	668	112	820
Communication for External Audiences	136	40	256	256	688
Leadership	496				496

Hours of Regional learning received for building individual capabilities by topic and years in the Bank (as of December 31, 2005)

Topics / Years in the Bank	0-3	4-10	11-20	21+	n.a.	Total
Procurement	6,369	4,344	1,409	424	932	13,477
Operational Processes and Skills	5,896	4,453	1,473	632	617	13,071
Administrative and Operational Support Skills	3,146	4,069	1,670	417	180	9,482
Information Technology for Bank Staff	1,479	3,370	1,084	242	171	6,345
Written Communication	2,625	2,372	453	20	306	5,775
Information Technology for IT Staff	616	3,360	353	114	37	4,480
Monitoring and Evaluation	1,022	1,380	258	169	122	2,949
Economic Statistics and Data	1,355	669	235	144	191	2,593
Health	1,035	1,048	120	120	80	2,403
Portfolio Management	1,000	976	40		48	2,064
Languages	1,364	550	41			1,955
Communication for Bank Audiences	784	636	200	96	168	1,884
Social Protection and Labor	646	843	162	40	40	1,732
Client Partner Engagement Skills	623	551	208	93	195	1,669
Trust Funds	496	420	332	80	176	1,504
Transport	784	387	36	48	164	1,419
Poverty Measurement	626	560	24	40	114	1,364
Urban Development	398	428	341	66	49	1,282
Resource Management	81	1,034				1,115
Gender	360	720				1,080
World Bank Forms	707	203	142		18	1,069
Presentations	331	415	195	56	8	1,005
Education	288	448	80	48	80	944
Bank Financial Products	316	308	80	64	52	820
Communication for External Audiences	192	328	112	48	8	688
Leadership	80	232	168	16		496

Note: The "years in the Bank" categories follow the breaks and labels provided by the LMS.

APPENDIX E: LOGISTIC REGRESSION ANALYSIS OF LMS DATA FOR SIX REGIONS, FY06

The following analysis is based on all LMS data for staff working in the six Regional VPUs. Activities were coded into four broad categories based on their objectives: raising staff awareness, building individual staff capabilities, building team effectiveness and developing leaders. Within each of these categories, specific objectives were identified (for example, ethics awareness, P&T skills) and further refinements made where appropriate. We then examined the probability of participating in various activities, according to staff Region, country office (vs. headquarters), grade group, and years at the Bank (table A.E.2). A further analysis was undertaken for activities for building individual capabilities specifically (table A.E.3).

Regions differ in their attention to raising awareness, building individual capabilities, building team effectiveness and developing leaders. Staff in EAP, LCR and SAR are more likely and staff in MNA are less likely to participate in awareness activities than staff AFR or ECA. Staff in AFR and MNA are more likely to participate in activities to build skills compared with staff in other Regions. Staff in ECA are three times as likely to engage in activities to enhance team effectiveness than staff in AFR, those in MNA are half more likely to, while those in EAP and SAR are less likely to do so. Leadership development is largely unrelated to Region, but staff in LCR are 80 percent more likely to engaged in leadership development than staff in AFR, and staff in MNA are 70 percent more likely to do so.

Among staff who participate in activities designed to build their capabilities, those working in AFR, MNA or SAR are more likely to focus on building operational skills, as compared with staff in EAP, ECA or LCR, for whom the odds are much lower. Staff working in SAR have lower odds of learning related to P&T skills, and staff in EAP, LCR and SAR have higher odds of learning related to communication, when compared with staff in other Regions.

Country office staff, when compared with headquarters staff are half as likely to participate in awareness activities and over twice as likely to participate in those that build skills. CO staff are 40 percent more likely to participate in activities to develop leadership. Location is not related to the probability of participating in activities to build team effectiveness.

Among staff who participate in activities designed to build capabilities, CO staff are twice as likely to focus on building Operational Skills compared with HQ staff. However, CO staff are significantly less likely to participate in activities related to other major areas of capability: P&T skills, resource management skills, administrative skills, or IT skills.

Staff grade groups—and hence job descriptions**—**are strongly related to the odds of participating in various types of learning. Staff levels GE and above are significantly more likely to participate in learning activities to build awareness than are GA-GD staff, whereas GA-GD staff are significantly more likely to participate in learning activities to build their skills. Staff levels GF and above are more likely to participate in learning activities to build team effectiveness and those in levels GG and above are more likely to participate in leadership development activities. Among staff who participate in activities designed to build capabilities, staff levels GE and above are much more likely to engage in learning about P&T skills, operational skills, and resource management, and less likely to engage in learning about administrative skills, IT skills or communications, as compared with those in levels GA-GD.

Grade group by location interactions: Country office staff in levels GF and GG are twice as likely to engage in learning about operations, compared with other staff, and are about half as likely to engage in P&T and communications learning activities.

Table A.E.1: Odds ratios for observed learning for selected staff capabilities by grade group and location, World Bank Regional staff, FY06

	Odds Ratios *(significance)*		
Interaction term	**Operations**	**P&T skills**	**Communications**
CO x GE	0.94	0.20***	1.27
CO x GF	2.05***	0.53*	0.43***
CO x GG	2.12***	0.56*	0.25***
CO x GH	0.84	1.06	0.57

* = p < .05; ** = p < .01; *** = p < .001
Note: After controlling for grade group, Region, years in the Bank, and location.

Table A.E.2: Odds ratios for observed learning by major purpose of learning, World Bank Regional staff, FY06

	Raising Awareness	Building Capabilities	Team Effectiveness	Developing Leaders
Region				
AFR	1.00	1.00	1.00	1.00
EAP	1.67***	0.62***	0.70*	1.01
ECA	1.02	0.73***	3.15***	0.79
LCR	1.21***	0.78***	1.17	1.81**
MNA	0.88*	1.02	1.55**	1.68*
SAR	1.70***	0.63***	0.58**	0.86
Location				
Headquarters	1.00	1.00	1.00	1.00
Country Office	0.44***	2.25***	1.03	1.44*
Grade Group				
GA-GD	1.00	1.00	1.00	1.00
GE	1.20**	0.83**	0.97	0.86
GF	1.34***	0.70***	1.66***	1.64
GG	1.37***	0.60***	2.47***	2.42**
GH+	1.58***	0.29***	3.29***	39.32***
Years in the Bank				
0-3 years	0.84***	1.19***	1.10	0.48*
4-10 years	0.85***	1.12*	1.31*	1.09
11+ years	1.00	1.00	1.00	1.00
Number of cases	17292	17292	17292	17292

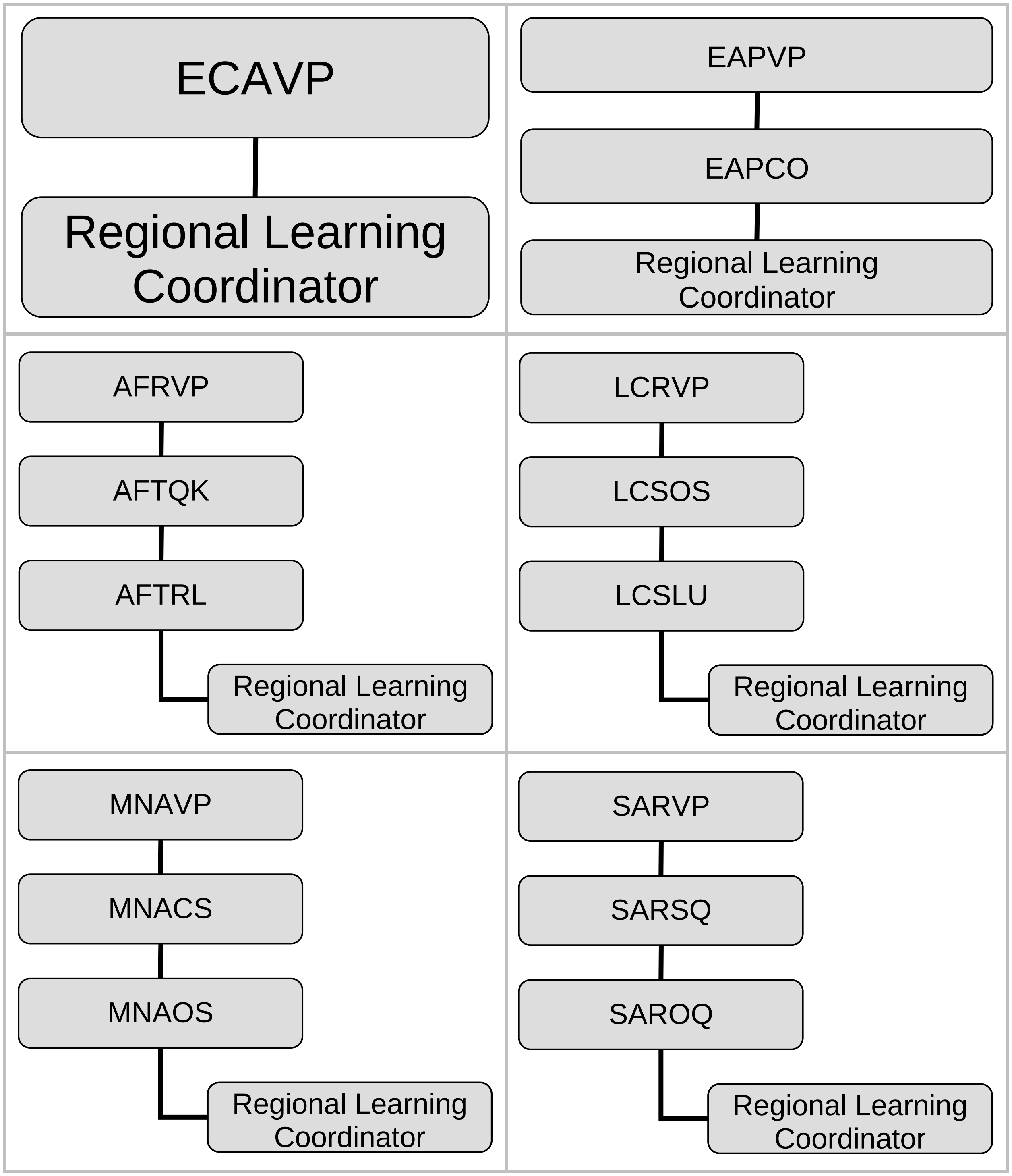
* = p<.05; ** = p< .01; *** = p< .001

Table A.E.3: Odds ratios for observed learning for selected staff capabilities, World Bank Regional staff, FY06

	Operational Skills	Administrative Skills	P&T Skills	Communications	IT Skills	Resource Management
Region						
AFR	1.00	1.00	1.00	1.00	1.00	1.00
EAP	0.59***	0.66	1.23	2.74***	1.01	1.40
ECA	0.63***	0.53**	1.12	1.12	1.28**	1.15
LCR	0.69***	0.87	0.99	1.72***	1.22*	1.17
MNA	1.34**	0.28*	0.81	1.00	1.18	1.04
SAR	1.07	0.77	0.72*	1.32*	0.75	1.42
Location						
Headquarters	1.00	1.00	1.00	1.00	1.00	1.00
Country Office	2.21***	0.63*	0.38***	1.20*	0.78**	0.62***
Grade Group						
GA-GD	1.00	1.00	1.00	1.00	1.00	1.00
GE	3.70***	---	5.45***	0.58***	0.70**	1.24
GF	2.52***	0.02***	17.69***	0.82*	0.22***	2.69***
GG	4.84***	0.04***	16.75***	0.54***	0.14***	2.56***
GH+	4.55***	0.14**	18.84***	0.73	0.13***	1.89*
Years in the Bank						
0-3 years	1.30**	1.09	1.12	1.09	0.76*	0.85
4-10 years	0.99	0.84	1.00	1.15	1.29**	0.57***
11+ years	1.00	1.00	1.00	1.00	1.00	1.00
Number of cases	7270	6450	7270	7270	7270	7270

* = p<.05; ** = p< .01; *** = p< .001

APPENDIX F: ORGANIZATIONAL CHART FOR REGIONAL LEARNING COORDINATORS



APPENDIX G: SURVEY OF STAFF FROM SAMPLED REGIONAL UNITS

Staff of sampled managers were asked: "Since July 1, 2005, what **types of learning** experiences did you have (other than World Bank training sessions)? Please check an option only if the World Bank sponsored, arranged, and/or organized at least part of it. (Please check all that apply.)" Out of 457 staff surveyed, 299 (65 percent) answered.

Type of learning modality	Number of participant responses	Response rate
a. Carrying out a developmental assignment or secondment	23	8%
b. Participating in an immersion program (e.g., language immersion, field immersion)	27	9%
c. Visiting other organizations or field visits	63	21%
d. Learning on-the-job from a colleague (e.g., bringing a Network sector expert on mission, getting a mentor or coach)	117	39%
e. Participating in a group peer learning program or community of practice	52	17%
f. Learning with your team using real work through a facilitator (e.g., multi-sectoral team learning)	60	20%
g. Using a help desk or consulting an expert who provides advisory services	77	26%
h. Using a self-learning tool designed to help you perform a specific task	13	4%
i. Reading a study, operational guide, and/or a knowledge web site	146	49%
j. Being evaluated through a 360 degree assessment	24	8%
k. Attending a non-World-Bank course (but paid in part by the WB)	61	20%
l. Participating in a non-World-Bank conference or professional association meeting (but paid in part by the WB)	48	16%
d or e or both. Learning on-the-job from a colleague (e.g., bringing a Network sector expert on mission, getting a mentor or coach) and/or Participating in a group peer learning program or community of practice	137	46%

Source: Authors' analysis

Appendix H: List of Recommendations for the LMS

This appendix highlights a series of issues and provides actionable recommendations related to making the Learning Management System a more useful tool to align staff learning strategically. The tables below are the result of a diagnostic of the LMS functions as of May and June 2007. This exercise uncovered other issues not listed here, as these are less relevant to the topic of this report. The appendix focuses on functions for two types of users of the LMS, i.e., learners and managers. When functions for course administrators affect the information for learners, the recommendations also covered the screens completed by course administrators. In each table the recommendations are organized around three types of actions: (a) providing relevant information to help managers and learners use the LMS strategically, (b) making the LMS more user-friendly, and (c) fixing malfunctions.

Functions for learners and background functions for course administrators

Issues	Recommendations
Providing relevant information clearly	
<u>Target audience by functions</u>: Learning activities are often designed around people's functions. Yet, the LMS does not have a target audience field by function. Instead the LMS uses two proxy fields, grade groups and "HR manager flag." While both fields jointly provide an indication of the function, indicating the target audience directly by functions would be simpler and more relevant. For example, a course administrator may select GF-GG as a grade group to indicate that the course is for TTLs. GE TTLs may miss it in a search by grade, while GF non-TTLs may return this course in their search.	Replace the target audience field "HR manager flag" and "grade group" with the "function" with the following values: managers (higher level), task team leaders, other higher level staff, office managers, and ACS staff.
<u>Specify HQ/CO target audience differently</u>: The LMS recently added a HQ/CO target audience field. Identifying activities for CO staff is useful, but the field is used inconsistently and can confuse learners who search through this field. Some course administrators tag HQ activities both HQ and CO, because CO staff are welcome to attend, if they happen to be in HQ. Learners in COs find these activities in searching for CO activities. Conversely, tagging HQ activities for HQ only may signal to CO based learner that s/he is not the target audience, even if s/he happens to be at HQ. CO is not a specific location. Bangkok sessions are irrelevant to Dakar-based staff.	Eliminate the HQ/CO target audience field. The country of delivery (a useful recent addition to the LMS search) or the online delivery mode (if canned or with moderation on their time zone) are better means of signaling to CO staff which activities are designed for them.

Issues	Recommendations
Target individuals vs. intact teams: A major difference in target audiences is individuals versus intact team. Yet, the LMS does not have a field distinguishing these types of audience.	Add to the session screen: "Is this session for intact teams?" yes or no. Next to this question, add an information icon that specifies: "Click yes if the session is specifically for participants who work together outside of the learning session. If participants need not be related to each other, click no."
Make target information search precise: All categories of target audience and course difficulty level are selected by the course administrator as multiple-choice options. Many activities are tagged with all choices available. Learners select a search criterion because it matters to them. They would expect to find only activities meeting their search criteria. However, they also find activities for which all choices were tagged, making the list needlessly long and potentially misleading. For example, a learner who searched for introductory activities may assume that all activities returned by the search are introductory, but some activities are tagged with all levels of difficulty.	Make the search return only activities tagged specifically with the selection criterion, i.e., the course administrator did not select at least one of the options available in the field. In the course administrator's activity detail screen, add an information icon next to the categorical target fields explaining the consequences of selecting all choices available when learners search by this field. In the learner's advanced search screen, add an information icon next to the categorical target fields explaining that specifying a criterion will only return the activities that specifically met the criterion. If a learner wants to find activities that may or may not meet the criterion, s/he should not search by this criterion.
Rename the difficulty level categories: The activities have recently been classified in the LMS as "introductory," "advanced," and/or "cutting edge." However, "cutting edge" relates to a concept different from "introductory "and "advanced." A topic can be cutting edge and treated at an introductory level. Conversely, a long-established topic can be taught at an advanced level. Therefore, the categories are not clearly mutually exclusive.	Rename the difficulty level categories "introductory," "intermediate," and "advanced."
Enable search by duration: Duration matters to learners who search for learning opportunities. Yet, the LMS search screens does not enables learners to search activities by duration.	In the advanced search screen, add a field to enable the search of activities by duration ranges.

Issues	Recommendations
Mandate clear learning objectives: The learning objectives field is often empty. Guidelines to fill it are vague: "specify learning objectives for this learning activity. This field appears in the Catalog." When information is provided, it is frequently written in terms of process (e.g., "participants will have the opportunity to discuss the issue") rather than targeted outcomes. Currently, the value of this important field is limited.	Make the learning objectives field mandatory. Guide the writing of results oriented learning objectives by offering three text boxes to type the objectives. Have the following read above each window (one sentence per window): • Upon completion of the activity, the participants will have greater awareness of: • Upon completion of the activity, the participants will be able to: • Upon completion of the activity, the participants will have developed: Add the following instructions in the information icon next to the field: "Write the learning objectives in the relevant text box(es). If a text box does not apply to the activity, please leave it blank. Examples of completed learning objectives: Upon completion of the activity, the participants will have greater awareness of: (a) the risks associated with ignoring corruption, and (b) tools available to deal with corrupt environments. Upon completion of the activity, the participants will be able to: (a) recognize the prevailing types of corruption in a given environment, and (b) choose an appropriate response to the corrupt situation. Upon completion of the activity, the participants will have developed: (a) greater confidence in their ability to respond to corrupt situations; (b) an action plan to deal with the corruption environment affecting their project; (c) stronger ties with their teammates, and (d) contacts with a network of professionals with whom they could discuss corruption issues."

Issues	Recommendations
Clarify delivery modes: Delivery mode information matters particularly to country office staff. Yet, the LMS delivery mode information is not intuitive and not always available to the learners. "Face to face" means that everyone takes the session at the same time, including webminars and videoconferences. "Online" relates to activity content taken online in a self-paced fashion. The advanced search screen lacks the icon explaining these definitions. Reading the explanatory icon leaves learners wondering how moderated online activities are recorded in the LMS. Also, no field indicates the time zones covered by live moderators. "Blended" means that the activity has both a required online and face to face components. However, blended activities returned by a search do not display session information. Instead learners are expected to click "enroll" before knowing the dates of the face to face component of the activity.	*Interim fixes*: Rename the delivery mode options. "Face to face" should become "synchronous (face to face, videoconference, webminars, moderated online)" and "online" should become "online without moderator." Update the information help menu accordingly and add it to the advanced search screen by the delivery mode field. Rename the "enroll" link of blended activities "view sessions." *Ultimate fixes*: Create a field for course administrators to select all applicable delivery modes among: • Face to face • Videoconference • Online with moderator • Online without moderator • Webminar • Other, specify: For activities "Online with moderator," add fields for the start and end time of live moderation (including the time zone). Let the learners search by this revised delivery mode field.
Inform learner of session's exact location: In FY06, the LMS did not let learners know the city and country of delivery of sessions. The location field was an open-ended field most often filled with a room number and not systematically searchable. Recently, this open ended location field has been replaced with city and country of delivery. This is great progress, particularly for CO staff. However, from the current LMS, learners do not know the precise location of a session, beyond city or country. Before enrolling, learners should be able to know the precise location of the session, notably when sessions take place out of the Bank's buildings.	Add an "address/room number" field to the session information screen.
Inform users of sessions' schedule: To help learners fit training in their work, several activities use non-consecutive sessions. The LMS session information screen does not let the learner know the exact session schedule, before enrolling. After enrolling, the learner receives an automatic calendar invitation by email that covers all hours between the start and end dates of the sessions, including the time not assigned for the session.	Inform users of the exact session time before enrolling. Fix the interface with the Lotus Notes calendar entry.

Issues	Recommendations
Expand the language field: The drop down list of activity language only enables a selection between Arabic, Chinese, English, French, Portuguese, Russian, and Spanish. If an activity is in another language, it cannot be indicated and searched by this language. Also, the LMS does not enable course administrators to indicate sessions delivered in several languages, e.g., a joint client staff learning session in French and English with interpretation.	Add "other, please specify" to the list of activity languages. Make the language field a "select all that apply" type of field.
Enable learners to flag unrecorded sessions: The individual learning plan screen enables learners to add external training and on-the-job learning opportunities to their learning records. However, learners cannot add internal sessions that they attended but that were not recorded in the LMS. Learners who want to keep accurate records of their learning are left with the choice of recording missing internal learning sessions as external or not recording them at all. The LMS could take advantage of the fact that some learners keep their records accurate to identify unrecorded learning sessions and have them recorded retrospectively. It would take only one participant to flag a missing session and prompt the session to be included in the catalog after the fact thereby improving the records of all participants.	Add a "WB session not in the catalog" button to the individual learning plan screen. Have this button open a dialog box asking for the session title, dates, city of delivery, duration in hours, estimated number of participants, and contact person's name. Once a participant completes the information, the CLO's office should receive a flag email prompting them to verify the information and have the course administrator retrospectively include the session in the catalog and update the participants' records. The CLO's office could decide to follow-up only on activities that are over a certain duration, e.g., at least three hours.
Recognize mentors by name in the LMS: The LMS has fields to identify the training providers of internal and external activities, but not for on-the-job activities. Staff who receive on-the-job training from a peer or mentor cannot include their mentor's name to the LMS. Enabling this would encourage staff to record some of the largely underreported peer learning and mentoring activities. This information should get to the mentors' learning records and to their managers for recognition.	In the on-the-job learning activity dialog box filled by learners, add a field asking for the names of people who provided peer learning or mentoring. Have this information appear on the records of the mentors, their managers, and the learners.
Making the LMS more user-friendly	
Send learners relevant search updates: The current LMS does not enable learners to save searches. Learners interested in a topic for which no session is scheduled need to return to the LMS in the hope that a relevant session will be available at the time of their next search. This may induce learners to enroll in less relevant sessions available at the time of their search rather than waiting for more relevant sessions.	Enable learners to have the LMS notify them of upcoming sessions meeting their search criteria. Enable learners to disable this function anytime.

Issues	Recommendations
<u>Enable search refinement</u>: The LMS help menu in the activity view returned after a search says: "There are seven advanced catalog search fields that you can use to further refine your search by topic, delivery type, location, date, language, activity type, and Region. After completing a search, you may further refine your results if necessary by selecting the "Refine" link at the top of the search results panel." However, the "refine" link does not exist and search refinement is not possible. Learners need to select all search criteria from the start every time.	Enable learners to save searches. Add a "Refine search" button on the search results screen to enable learners to refine existing searches. Update the help menu to match the fields by which one can search.
<u>Allow several selections in dropdown lists</u>: The advanced search screen has several fields that are conceptually designed for multiple selections, i.e., topic, language, learning activity type, delivered by, country delivered in, level, sector, VPU, organization, time in Bank, and grade group. Yet, these fields appear in dropdown list allowing only one choice at a time.	In the advanced search, enable multiple selections for the fields that are currently in drop down lists with more than two options, notably: topic, language, country delivered in, level, and sector.
<u>Enable exclusion of Brown Bag Lunches</u>: BBLs are numerous and generally advertised by emails. Learners who look for in-depth knowledge cannot exclude BBLs from the list of activities returned in a search.	Add a check box on the advanced search screen to allow users to exclude BBLs.
<u>Easily omit activity without sessions</u>: Unless learners search by dates, the LMS returns all matching activities, including those without scheduled sessions. The screens do not intuitively let users search only activities with scheduled sessions. Learners who browse by topic return all activities and cannot select only those with scheduled sessions.	Add a check box to the advanced search screen to return "activity with scheduled sessions only." For this search, count online activities as having scheduled session. On top of the search result screen, add a button to show or hide activities without sessions.
<u>Display search criteria in the results screen</u>: When a search is conducted, for most fields the results screen does not indicate what was searched.	On top of each search results screen indicate the criteria selected, akin to what is already done for the date fields.
<u>Enable the sorting of search results</u>: The LMS searches return activities sorted by alphabetic order of the title. This sort order is of little value to learners, and there is no means to change it. Also, the list of activities is split by screens of about fifteen activities. Longer lists cannot display on one screen.	Enable all searched activities to be displayed on one screen, regardless of length. Add the start date of the sessions to the activity search results screen. Use the first session's start date as default sort order. Place online activities after the activities with sessions. Place face to face activities without sessions at the end. Enable each column to be sorted (in ascending or descending order) by clicking on its header.

Issues	Recommendations
Display sessions with activity information: Learners can either see activity information or session information. Both related pieces on information cannot be viewed together.	Display the list of sessions at the bottom of the activity description.
Enable session view exit without enrolling: Often, though not always, learners who view the sessions of an activity are only offered the choice to enroll in a session. There is no exit button, and the Internet "back" button generally gives error messages. Then, learners need to rebuild their search from scratch, a needlessly time-consuming task.	Create a "back" button from the session screen, and make it work.
Highlight activity target and level better: If a course administrator selected all available options in the target audience or difficulty level fields, each option is displayed in the activity description viewed by learners. This makes the information on target audience and level long and confusing.	In the learner's view of the activity, display "any" instead of the list of each option, when the course administrator selected all available options.
Clarify the sector field: Both course administrators and learners are presented with a long and unclear list of sector's acronyms not spelled out, making the sector field hardly useful in its present form. The list can also be confusing, e.g., the options include URB and URBAN, or INF and INFRA without explaining the differences.	Spell out the acronyms of the sector field values on the screens of course administrators and learners. Review and possibly shorten the list of options, notably those that refer to the same sector.
Fixing malfunctions	
Find countries under the Region searched: The "country delivered in" field lists world Regions. A learner searching for activities delivered in a Region expects to find all activities delivered in the countries of the selected Region. Instead the search result omits all activities delivered in the countries of the Region—potentially misleading country office staff.	Have the LMS advanced search return all activities delivered in the countries that make up the selected Region.
Place "rest of the world" after "South Asia:" In the drop down list of the field "country delivered in" the option "rest of the world" comes before "South Asia."	Reorder the dropdown list option to place "South Asia" before "rest of the world."
Fix the "exclude these words" field: The advanced search field "search for all of the words" or "search for any of the words" together with "exclude these words" returns only the activities that have both the words to include and those to exclude. The activities corresponding to the search are precisely those not returned by the search.	Make the "exclude these words" field exclude—rather than include—activities with these words.

Functions for managers

Issues	Recommendations
Providing relevant information	
Add learning content to manager reports: Managers need to know what their staff have learned, and what they need to learn. The LMS reports for managers are not providing information on the content of their staff's learning activities. The information currently available to managers in the LMS reports is limited to the staff name, number of completed learning activities, and number of days spent on learning.	Add to the LMS reports for managers the options to: 1. display the topics and learning themes of the learning activities completed by staff ("learning theme" currently appears in the reports, but without data) 2. display the title of the leaning activity, with or without date of completion[10] 3. query and group the results by topics and learning themes, enabling multiple selections 4. query and group the results by title of a particular activity (e.g., FBO, TLAP) selected from the Catalog.
Add staff profile to manager reports: Learning needs depend in part on functions and areas of expertise. The current LMS reports for managers only provide information by grade, location, gender, years in the Bank, appointment type, and HR manager flag.	Add to the LMS reports for managers the following variables for query, grouping and display: 1. Function, i.e., managers (higher level), task team leaders, other higher level staff, office managers, and ACS staff. (Each person could be automatically coded using HR and SAP data.) 2. Sector mapping 3. Professional affiliation 4. Specialization.
Display learning content in ILPs: Managers have the option to view the learning plans of their staff one person at a time. However, the individual learning plans are uneasy to read and do not provide information on the content by categories.	Add topics and learning themes to the individual learning plan's view.
Email suggested learning to managers: Managers need to have a relevant menu of learning corresponding to the learning program recommended for each staff member.[11]	Quarterly email the unit's manager suggested learning for each staff member based on: 1. past learning (no course repetition, taking into account prerequisites), 2. staff profile (years in the Bank, grade, function, sector mapping, professional affiliation, specialization), and 3. available matching upcoming events for the next six months.
Making the LMS more user-friendly	
Save default queries: To busy managers, the reports may look cumbersome to build. A manager is most likely to query his unit. Yet, the default unit value is blank. Once a manager builds a query s/he is likely to monitor the same data in the future, but the queries cannot be saved.	1. Create a default query based on the manager's unit, grade, and number of days spent in learning. 2. Enable a manager to save queries, including saving a customized query as default.

[10] The LMS should enable staff to exclude some training from their learning records. For example, some staff may not want to attend training about harassment, if managers receive this information.
[11] Excluding short-term temporaries, consultants and contractors.

Issues	Recommendations
Improve the ILP view: The Individual Learning Plan's view is confusing. The records are displayed in an unfriendly manner. Over time, ILPs display more and more records. Newer records appear at the bottom, sometimes hidden in the collapsed section.	1. Enable ILP sorts by displayed fields. 2. Put the date and location in separate fields to enable sorting by date. 3. Give the option to hide the location. The room number is an unimportant piece of information that clutters the ILP and managers' view of the ILP. 4. Enable records to show or hide based on filters akin to an Excel auto-filter function (e.g., planned events, events within specific dates)
Expand the ILP comment length: The comment sections of the ILP are limited to 256 characters.	Do not limit the length of the "comment" field.
Make the tutorials more complete: The LMS tutorial for managers stops short of explaining what information the reports provide (or do not provide, e.g., lack of information on learning content).	Explain the reports in the tutorial.
Clarify the report's navigation: When a manager's report appears on screen, users may think that only the "main report" or "aggregate results by numbers" is available because the drop down menu only shows "main report." The arrows on top of the screen indicate "1/1+" instead of the actual number of pages. It is misleading. Only after clicking the yellow arrows showing the subsequent pages will the subsequent section "section 1" with individual records appear in the drop down menu, and the number of pages in the report be indicated.	Make the navigation of the report clearly indicate the content of the report from the start.
Fix the export function: The report format "MS Excel 97-2000" exports numeric data as text. Statistics cannot be directly computed on the number of staff, number of completed learning activities, and number of days spent on learning. The report format "MS Excel 97-2000 (Data only)" does not provide the data in a spreadsheet format ready for analysis. It only exports the section "report by staff name." Empty rows separate records. Variables related to the query (unit queried, grouping variables) are not associated with each record. Variable names are not in the same columns as their data.	Export numeric data as numeric data. Make the report format "MS Excel 97-2000 (Data only)" export data in a spreadsheet format ready for analysis, including all grouping variables indicated on the section "report by aggregate numbers" associated with each individual's record. Put the data in the column corresponding to their variable names.
Describe the report's selected content: The reports do not indicate the exact choices made at the query time. Someone receiving the report cannot tell the parameters of the report (i.e., start and end dates of the data, grouping variables, sorting order). Every report is exported with the same file name "CrystalReportsViewer."	Describe on the report the exact parameters used to produce the report, i.e., the unit and start and end dates of the period queried, the grouping variables, and the sort order. Automatically assign an export filename that indicates the parameters queried.
Fixing malfunctions	
Make the report internally consistent: The number of staff in the "report by aggregate numbers" does not match the number of staff in the next section of the same report called "report by staff name."	Have both sections of the same report match.

Issues	Recommendations
Fix the sorting function: The report's sort order "number of days spent on learning (from high to low)" sorts the data by "number of completed learning events (from high to low)" instead, and vice versa. Also, the sorting is inaccurate because the report treats numbers as text. Therefore, "10" appears between "2" and "1."	Make the report return what was requested. Treat "number of completed learning activities" as a numeric value and sort them accordingly.
Label and report years in the Bank clearly: The labels used to reports the years in the Bank are not continuous. Some people do not fit into any of the report's year ranges. People with less than a year in the Bank are reported as having "01-02" years. It is unclear whether people with two and a half years are counted with "01-02" or with "03-05" years in the Bank. The years of experience may match the actual years of experience of staff as of today, but not as of the dates queried. The reports do not explain what is counted as years of experience.	Rename the ranges of years in the Bank to indicate where the categories are cut—without gaps or overlaps. Display the years of experience as of the end date of the query and mention in the footnotes that the data are as of the end date of the query. Explain in a footnote what counts as years of experience, notably clarify how the following cases are counted: 1. non-consecutive years 2. short- and long-term appointments as consultants or temporaries 3. contractors 4. fixed term contracts, etc.
Use the query's end date for grade groups: The data on grade group is not always as of the dates queried. This is misleading when retrospective queries are conducted.	Display the grade group as of the end date of the query and mention in the footnotes that the data are as of the end date of the query.
Fix query processing errors: The reports for managers are slow and often return error messages. Even when the "report by aggregate numbers" displays data, the subsequent "report by staff name" may display error messages. The reports time out quickly. The error messages associated with the internet navigation suggest refreshing the query, but this operation is not feasible and leads to other error messages.	Make the queries return data instead of error messages.