

Recognizing the vital role that the OCHA-managed Pooled Funds play in catalyzing system change and in supporting learning across the Inter-Agency Standing Committee (IASC), the Pooled Fund Management Branch set out to develop a Learning and Knowledge Management Framework.

The primary objective of the framework is to maximize the value and impact of the Funds while fostering positive humanitarian system change. The framework is closely aligned with OCHA Strategic Plan and intends to position OCHA-managed Pooled Funds as platforms for developing, testing, and rolling out innovations, as well as for facilitating learning for the broader humanitarian system.

The framework will strengthen the efficiency and coherence of the Pooled Funds’ knowledge acquisition, management, integration into policy and guidance, and dissemination to OCHA staff and other organizations. The development of the framework was informed the organizational learning methodology employed by the Active Learning Network for Accountability and Performance (ALNAP)¹.

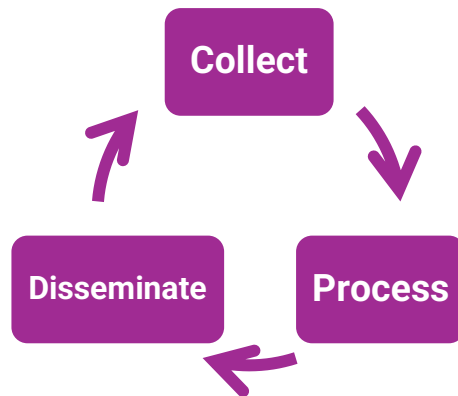
Following extensive research on learning and knowledge management practices across the humanitarian system, ALNAP concluded that...

“...so much research and analysis has highlighted the limitations and failures of organizational learning that it is safe to assume that absence of organizational learning is in fact the norm.”

Components of the Framework

The framework categorizes the pooled funds’ knowledge management efforts into three interlinked components: collection, processing, and dissemination.

The third component is dedicated to the consistent, effective and swift sharing and application of knowledge through appropriate channels tailored to meet the needs of each constituency.



The first component aims to leverage external knowledge sources and internal information on the performance of the Funds to create a comprehensive, structured, and up-to-date knowledge base.

The second component focuses on systematic analysis, management, and interpretation of knowledge, and ensuring its integration into the policy and guidance materials of PFMB.

Analyzing current learning and knowledge management efforts of the Funds across the three components resulted in identifying a set of priority activities with the highest potential for driving greater learning.

Constituencies

The learning framework identifies four key constituencies as stakeholders in Pooled Funds learning and knowledge management:

- OCHA pooled fund staff
- Pooled Funds partners (grant recipient organizations)
- Pooled Fund stakeholders (RC/HCs, donors, Pooled Funds advisory bodies, and other OCHA staff)
- The broader humanitarian system

The framework groups its activities by constituency to illustrate the impact that it will have on key stakeholders.

¹ ALNAP report *Learning to Change* ([alnap-learning-to-change.pdf](#)) describes organizational learning as a process that works to generate, consolidate, retain and share knowledge across organizations.

Advancing Learning and Knowledge Management of OCHA Pooled Fund staff

The framework outlines actions to help ensure that OCHA Pooled Fund staff remain knowledgeable about fund management best practices and engage in continuous learning, ensuring that the Funds remain fit for purpose.

The following priority actions are proposed:

1. **OCHA will continue to develop guidance notes for Pooled Funds**, articulating the Funds’ policy positions and practices across various priority thematic areas (e.g., gender, disability inclusion, localization, accountability to affected people). These guidance notes will enhance the Funds’ abilities to consistently advance key system-wide priorities and achieve greater alignment across different contexts. Each guidance note will be accompanied by a library of innovations and best practices, featuring easily accessible and replicable examples across Funds.
2. **OCHA will continue to roll out ‘Communities of Practice’ focused on a range of thematic issues**, serving as platforms for Pooled Funds’ staff to exchange knowledge and best practices. These communities will be the primary channel for disseminating guidance notes to field staff, drawing learning from them, and ensuring consistent updates. The ‘Communities of Practice’ will also provide opportunities to document and replicate impactful innovations.
3. **OCHA will develop a ‘Knowledge Portal’, which will be a shared drive with guidance notes, Standard Operating Procedures, libraries of best practices, tools, templates and all other documents related to day-to-day management and administration of the Funds**. It will consolidate existing resources into a single drive, organized by themes, such as capacity assessments, monitoring, audits, etc. The portal will serve as an online tool for Fund Managers and staff of Humanitarian Financing Units (HFUs).

Advancing Learning and Knowledge Management of Pooled Fund Partners

The framework outlines actions that will enable pooled fund partners to understand pooled fund policies and standards, and to be supported in developing and implementing high-quality projects. The following priority actions are proposed:

1. **OCHA will develop guidance for pooled fund partners**, establishing “minimum” and desirable standards on key thematic issues. This guidance will draw from existing policy frameworks and be developed in consultation with thematic experts. It will complement existing OCHA guidance for CERF and CBPFs, strengthening the translation of pooled fund standards into project outcomes, ultimately improving the quality of assistance for people in need. This guidance will also serve as valuable tool for OCHA pooled fund staff to ensure consistent review of project proposals.
2. **OCHA will strengthen training and knowledge sharing with partners** on thematic and other guidance, and enhance country-level partner support alongside this. While OCHA already engages with partners at the country level when allocations are launched, as well as through trainings, and lessons learned exercises after allocations, this will be expanded through the roll out of a standardized training package on topics covered in new CBPF/CERF guidance notes as well as a chat channel for partners to ask questions and exchange information.

Advancing Learning and Knowledge Management for key pooled fund stakeholders (RC/HCs, Donors, Advisory bodies, and other OCHA staff)

The framework outlines actions to support key pooled fund stakeholders in accessing up-to-date knowledge to support their interaction with, understanding of, and contribution to the pooled fund instruments. The following priority actions are proposed:

1. **OCHA will continue to develop guidance for RC/HCs on Fund management and support peer learning amongst this important stakeholder group**. OCHA will develop and disseminate essential information on the strategic use of the Funds, including on complementarity with other funding mechanisms and facilitate its dissemination through peer-to-peer exchange, sharing experiences, and ensuring adequate follow up. These

exchanges will be tailored to the needs of RC/HCs and, as much as possible, will leverage existing fora such as the annual RC/HC retreat. Additionally, dedicated one-on-one support will be provided if needed.

2. **OCHA will continue to strengthen ongoing engagement with members of the Pooled Funds advisory bodies** and will further invest in onboarding of new members and ensuring dedicated support as required, based on availability of resources.
3. **OCHA will provide customized communication materials for key stakeholders, and in particular Member States, on how the pooled funds have made a difference across a range of areas.** The “Pooled Funds in Action” series will seek to ensure a broader understanding of the Pooled Funds’ strategic goals and contributions on thematic areas. It will also highlight some key success stories and contribute to a better, wider understanding of how the pooled funds work.
4. **OCHA will draw on improved After-Action Reviews to promote learning among field constituencies.** Lessons learned at the country level can support the identification of best practices and innovations – which can greatly contribute to knowledge in-country, as well as across the humanitarian system.
5. **OCHA will continue to develop and enhance the knowledge on Pooled Funds among OCHA staff.** This effort will build on existing OCHA learning and development initiatives, and will target all OCHA staff (management and technical) who engage with the pooled funds across headquarters and field offices.

Advancing Learning and Knowledge Management for the Humanitarian System

The framework outlines actions to ensure that the Pooled Funds contribute to catalyzing ‘system change’ and facilitate learning across the broader humanitarian system. Lessons learned from strategic initiatives undertaken by Pooled Funds can offer valuable insights into the humanitarian system, benefitting numerous actors and contributing to policy development. Conversely, in this way, learning and the identification of best practices across the humanitarian system can also be reflected in pooled fund practice. The following priority actions are proposed:

1. **OCHA will strengthen its reviews and studies on the strategic initiatives undertaken by the Pooled Funds to generate knowledge that can be shared with and scaled across the humanitarian system.** These studies will provide insights into the effectiveness of the Pooled Funds’ strategic initiatives and identify key barriers encountered. OCHA will disseminate this knowledge within the humanitarian system, benefitting the design of strategic initiatives by other actors and fostering system-wide learning to drive positive change.
2. **OCHA will conduct systematic horizon scanning for new knowledge and strengthen its engagement in policy fora** to stay abreast of system-wide trends, and innovations, incorporating new knowledge from outside the humanitarian sector into the Pooled Funds. This will include consistent monitoring of the humanitarian landscape for new policies, studies, and innovations, as well as strengthened participation in key policy fora within and outside of the IASC.
3. **OCHA will strengthen its ability to develop innovative approaches through the pooled funds.** It will seek to more systematically identify, test, document, promote and roll out innovative approaches through the Pooled Funds. Through these efforts, OCHA will also share lessons learned on best practices with the broader humanitarian system, promoting their replication by other actors. This builds on Pooled Funds’ strong record in fostering innovations (e.g. on anticipatory action, climate financing, and risk sharing).
4. **OCHA will forge strategic partnerships for learning to support its ability to contribute and draw from knowledge across the humanitarian system.** Partnerships with academia and think tanks can introduce new knowledge into pooled funding, informing strategies and approaches, while partnerships with various networks can facilitate dissemination of lessons learned by the Pooled Funds, thereby promoting system-wide learning and positive change.
5. **OCHA will co-facilitate with ICVA global pooled funds community of practice.** This community will be open for partners of OCHA-managed Pooled Funds and several other large humanitarian, development, peace, and climate Funds. It will improve information exchange on pooled funding, accelerate standardization of approaches, and promote innovations.