

Building and Using a Learning Toolkit: A Practical Reflection Guide for CSOs

Introduction

This guide was co-designed with CSOs as part of the FEF-OSC 2025 programme. During the first in-person workshop, participants prioritised “Learning Toolkit” as a coaching topic because many organisations recognised that lessons, templates, and resources often get lost or repeated. Staff turnover, weak documentation, and project deadlines all contribute to these gaps.

The aim is that by creating a simple Learning Toolkit, CSOs can capture, store, and share what they’ve already developed and make it easier to learn, unlearn, and relearn across teams. This guide builds on the facilitated session that was held on September 10 with registered CSOs and provides reflection points for step-down use with their team.

1. What is a Learning Toolkit?

A Learning Toolkit is a curated collection of tools, templates, and resources that your organisation can draw on repeatedly. It’s not about creating new material every time, but about organising and re-using what you already have. It can be digital (shared Google Drive folder, Dropbox, OneDrive) or physical (binder, folders, manuals). The key is that it is accessible, practical, and evolving.

Reflection: How would you explain what your “Learning Toolkit” is to a new staff member in your CSO? Think ‘orientation/induction’.

2. Why Does It Matter for CSOs?

A Learning Toolkit matters because it strengthens organisational effectiveness in several ways:

- Prevents reinventing the wheel: saves time and energy.
- Builds institutional memory: lessons don’t disappear when staff move on.
- Supports onboarding: new staff learn faster when they see past work.
- Enhances credibility: organised resources impress donors and partners.

Reflection: Where have you seen knowledge get lost in your organisation? What difference would it make if it was captured in a toolkit?

3. Key Components of a Learning Toolkit

A complete toolkit could include:

- Templates & forms (reporting, budgeting, proposals, meeting notes).
- Guidelines / SOPs (how to run community meetings, safeguarding procedures).
- Case studies & lessons learned (from past projects).

- Resource library (policies, donor guides, reference documents).
- Action planners / checklists (to make tasks easier for staff).

Reflection: If you had to start today, which 3 items would you add first to your toolkit?

4. What Form Could It Take?

Your Learning Toolkit doesn't have to be sophisticated. It could be:

- A simple Google Drive folder with labelled subfolders.
- A shared binder with sections (Templates, Guidelines, Case Studies, Resources).
- A hybrid solution — digital storage + printed “go-to” binder for field staff.

Reflection: Which form would work best in your organisation — digital, physical, or hybrid?

5. Looking Inward – Embedding the Toolkit in Your Organisation

The real power of a Learning Toolkit is not just in creating it, but in making it part of how your CSO works every day. To start, reflect inward with your team:

- What documents do we already have but never use? Example: Past donor reports, old proposals, training manuals from a previous project, or even meeting minutes that contain lessons but sit in a folder.
- What tools do we keep recreating for every new project? Example: Budget templates, activity reporting forms, sign-in sheets, or safeguarding guidelines that get designed from scratch each time.
- Which resources would help new staff succeed faster? Example: An onboarding pack with HR policies, a “how we work” guide, or even a simple project orientation slide deck.
- Who will be responsible for maintaining and updating the toolkit? Example: The M&E officer could update data tools, the finance officer could manage budget templates, and the programme manager could oversee case studies and lessons learned.

Reflection: How can your organisation embed the Learning Toolkit into its daily work so that it becomes a living resource and not a forgotten folder?

6. Next Steps – Start Small, Grow Over Time

Practical steps to begin:

- Step 1: List 3–5 tools/templates you already use often.
- Step 2: Assign a focal point to gather them into one place.
- Step 3: Decide where the toolkit will “live” (Google Drive, binder, etc.).
- Step 4: Share with your team and invite contributions.
- Step 5: Review every 3–6 months; add lessons, remove what's outdated.

Reflection: What one action will you take in the next 30 days to start your CSO's Learning Toolkit?