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GUIDE TO LEVERAGING LESSONS LEARNED:

Enhancing Operational Effectiveness at the Inter-American Development Bank

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GUIDE TO LEVERAGING LESSONS LEARNED

to Enhance Operational Effectiveness at the Inter-American Development Bank

Introduction

This Guide seeks to increase the effectiveness of Inter-American Development Bank (IDB) projects across Latin America and the Caribbean by consolidating the generation and documentation of tacit and explicit knowledge throughout the duration of the project. [1]

It aligns with the IDB Group Institutional Strategy 2024–2030: Transforming for Scale and Impact, which strengthens and expands the institution's mandate regarding knowledge. For many years, the Bank has provided important financing to the region while becoming the preferred source of knowledge and solutions for public policy and development challenges. The institutional strategy confirms that the production of knowledge is essential to enhancing the IDB's development impact while its dissemination and use are central value propositions for executing agencies, governments, and clients in the region.

This Guide outlines the identification, documentation, dissemination, and reuse of operational lessons throughout the project life cycle and how these lessons are integrated into both formal processes (e.g., programming, monitoring, and evaluation) and informal exchanges (e.g., knowledge guided-exchanges methodologies). This approach ensures that all valuable insights and evidence from both successful and unsuccessful experiences are preserved and accessible to improve quality, decision making, accountability, and operational efficiency. This systematic gathering and sharing of knowledge ultimately lead to more effective development outcomes.

1 "Projects" refer to all types of sovereign guaranteed investment loans and herein are equivalent to "operations."

This document addresses the tendency for project results reports to be overly optimistic, with inconsistent levels of attention paid to lessons learned. Project Completion Reports, for example, often provide limited guidance on effectively documenting lessons that influence performance, leading to a situation where learning is not valued as much as accountability. In response to these findings, this Guide promotes continuous learning by encouraging staff to document both successes and setbacks in a safe environment. It provides a detailed overview of the following: (i) links between lessons learned and project effectiveness, (ii) phases of lessons learned, (iii) documentation of operational lessons in both formal and informal processes, (iv) tools to gain access to lessons learned, (v) roles and responsibilities, and (vi) future steps to better leverage lessons learned.

Lessons Learned in IDB Development Projects

According to Patton (2015) in his work on development evaluation, high-quality lessons should provide context and be evidence-based, actionable, and applicable to future initiatives. They should go beyond mere observations, supplying practical insights that inform decision making and drive effective action and offering clear guidance on how to proceed.

The IDB defines lessons learned as the knowledge gained from analyzing a process or experience. This involves reconstructing the logic (i.e., identifying key factors and cause-and-effect relationships) that may have influenced outcomes during the project cycle. The IDB divides the structure of a lesson learned into findings and recommendations.

A **finding** refers to the evidence or facts that show a causal relationship between the results of an intervention and the factors that contributed or failed to contribute to achieving them. A **recommendation** is a concrete, practical, and actionable proposal that, when applied in similar circumstances, can help solve problems, mitigate risks, or repeat and reinforce successes. Box 1 provides an example of lessons learned, presenting findings and recommendations that establish a clear cause-effect link between what occurred and actionable guidance for future interventions.

BOX 1.

Example of How to Structure a Lesson Learned

Lessons Learned from the National Agricultural Census in Latin America and the Caribbean

Some years ago, the IDB organized a knowledge exchange to share lessons learned and best practices from the design, implementation, and evaluation of National Agricultural Census (NAC) programs in Latin America and the Caribbean. It focused on the most recently launched programs in Brazil and Mexico and the ongoing process in Colombia, comparing the methods and best practices to those recommended by the United Nations Food and Agriculture Organization.

A NAC is a statistical operation that collects, processes, and disseminates foundational structural data on farm size, land tenure, land use, harvested areas, irrigation, livestock, assets, labor, and other agricultural inputs at the national or subnational level. A NAC is a core component of a national statistical system (complementing censuses, surveys, and administrative records), adding value in the following areas: (i) provides a reference point to assess the effectiveness of government policies and development programs; (ii) helps identify constraints to the growth and development of the agricultural sector; (iii) delivers comprehensive statistics to inform agricultural priorities; (iv) supports policymakers in analyzing poverty, food security, and gender-related issues; and (v) enables the private sector, including farmers, to make informed business decisions.

These elements are particularly critical in any large country with a significant agricultural sector, where carrying out an agricultural census is a complex, interdisciplinary task, typically requiring thousands of people, many years of planning and execution, and substantial financial resources. However, it also presents major benefits, such as training in new methods and techniques across various disciplines (e.g., statistics, cartography, and information technology); enhancing the broader national statistical system; updating materials and equipment within national statistics institutes; and producing reliable and timely data on the agricultural and rural sectors for the benefit of the entire population.

Findings and Recommendations

1. To ensure data comparability and interoperability, and to make full use of maps, geographic information systems, and shared infrastructure, NAC definitions and concepts should be compatible with or identical to those used in other components of the national statistical system (including demographic, industrial, and economic data).

2. In countries where NACs are infrequent and not coordinated with other complementary agricultural statistics, it is recommended to conduct one every five years. This applies to most countries in Latin America and the Caribbean, except for those with very small agricultural areas (e.g., islands or small territories). Conducting CNAs periodically is vital to update structural information, especially as pressure on the agriculture sector increases, including trade liberalization and free trade agreements, adoption of new technologies, changing business models, climate change and water availability, rural-to-urban migration, and the emergence of hybrid rural-urban lifestyles.

3. Develop an integrated agricultural statistics system based on three pillars:

    - Periodic NAC (every five years), primarily to understand changes to the structure of the sector.
    - An annual or seasonal national agricultural survey based on a probabilistic sampling design to ensure statistically reliable results.
    - A set of national or regional non-probabilistic surveys, based on well-organized networks of expert informants and administrative records. For administrative records, strong coordination is needed between the national statistics institute and the agency responsible for producing and maintaining the records.

The development impact of programs and projects depends on an organization's ability and commitment to learn from its operational experience. It is important to document lessons learned to systematize **tacit knowledge** (knowledge stored in people's minds) and transform it into **explicit knowledge** that can be shared and reused to improve project design and implementation. In addition to enhancing effectiveness, this process helps to strengthen risk management, foster collaboration, and support evidence-based policymaking by grounding decisions in practical experience. The IDB developed this Guide in alignment with its new institutional strategy as well as two of the guiding principles of its development effectiveness policy framework:

- **Development effectiveness intelligence:** data, knowledge generation, use, reuse and exchange, and learning from experience are inseparable from development effectiveness.

- **Country capacity:** monitoring, evaluation, and learning must be responsive to the great heterogeneity in capacities among countries as well as the data used to manage portfolios and projects for development results.

"Lessons learned are generated through formal processes and informal guided exchanges." / page 12

RODRIGUEZ, 2011

Lessons Learned Phases

There are four phases in management of lessons learned: identification, documentation, dissemination, and reuse.

1 —

Identification entails recognizing and making explicit the potential cause-and-effect relationships between project actions and outcomes. This phase entails acknowledging the likelihood of causal links between the results of an experience or process and the factors that contributed to those results. At this stage, it is important to reflect on what did and did not work in relation to the overall process, initiative, and expected outcomes.

2 —

Documentation involves identifying the key elements of a lesson learned and reconstructing the logic behind the results by tracing cause-and-effect relationships. Beyond conveying new knowledge, this phase provides the context to assess applicability to other projects, documents the causal links between expectations and outcomes, explains why certain results were achieved, and offers practical recommendations for future projects. To ensure consistency and accessibility, lessons are categorized using the IDB's risk framework.

3 —

Dissemination implies sharing newly acquired knowledge to encourage its reuse. The method of and format for this phase should be tailored to the audience and its specific needs.

4 —

Reuse involves applying lessons learned to other experiences and contexts. For this phase to be effective, project teams must recognize and embrace the value of learn from past experiences to avoid failures. Learning before, during, and after a project is an important and effective part of the development effectiveness framework.

How Does the IDB Collect, Systematize, and Share Lessons Learned?

Lessons learned are generated through formal processes (e.g., programming, preparation, monitoring, and evaluation) and informal guided exchanges (e.g., team debriefs and experience-sharing initiatives) (Rodriguez, 2011).

The Knowledge and Learning Division provides methodological guidance and support to different units across the Bank in collecting, systematizing, and sharing the lessons learned from these processes and exchanges (Briceño, Marshall, and Strand, 2019).

Formal processes often follow a linear model; however, integrating knowledge during project cycle stages is important to better leverage the learning opportunities already embedded within them. The learning ecosystem extends beyond formal project requirements, relying on tacit knowledge, community of practices, and informal exchange processes. The IDB's approach to knowledge management—its "knowledge loop"—emphasizes a continuous cycle of learning, where academic evidence informs operational decisions and operational experiences generate new evidence, ensuring that learning translates into action and drives greater development impact. Box 2 provides an example of this loop in motion.

BOX 2.

Bringing the IDB Knowledge Loop to Life

Identifying the Problem and Generating Evidence

When the IDB launched the Program to Support Employment (PAE I) in Bolivia—through the Ministry of Labor, Employment and Social Security—a key operational lesson quickly surfaced: job placement outcomes for people with disabilities were far below expectations. Only 10 percent of participants with disabilities secured employment, compared to 62 percent of participants without disabilities. This gap reflects deep systemic challenges: participants with disabilities often had less education and many required longer, more tailored pathways to develop job-ready skills. The IDB captured these insights through structured monitoring and evaluation processes, culminating in detailed Project Completion Reports, and transformed them into concrete action.

Using Lessons Learned in the Design of New Operations

When designing the follow-up operation (PAE II), the Bolivian government intentionally applied the lessons learned from PAE I through the following actions:

- Doubling the duration of on-the-job training for participants with disabilities, from three to six months.
- Providing intensive, personalized coaching throughout the process.
- Deploying specialized support teams in major urban areas.
- Engaging employers early with incentives and sensitization measures to foster inclusive hiring practices.

This strategic redesign demonstrates how operational knowledge, when systematically captured and applied, can reshape outcomes and foster transformative change.

Outcome

The employment gap narrowed to just 10 percentage points, a dramatic improvement from the previous 52-point disparity. Dropout rates among participants with disabilities declined significantly, thanks to enhanced support systems. In addition, participants reported greater confidence and preparedness for formal employment settings.

Maximizing development results requires a holistic learning approach, not only during project preparation and closure but also throughout implementation. It is important to document insights in accessible systems and integrate them into workflows. Informal guided exchanges of knowledge are especially valuable in this approach, enabling project teams to learn from past experiences and apply the knowledge in the design and implementation of operations. Figure 1 illustrates how knowledge management process, methodologies and tools help to capture lessons learned from both formal and informal processes and transform them into actionable, context-specific insights for development impact.

Figure 1. Opportunities to Capture Lessons Learned

What?

Forms of Knowledge

- Tacit
- Explicit

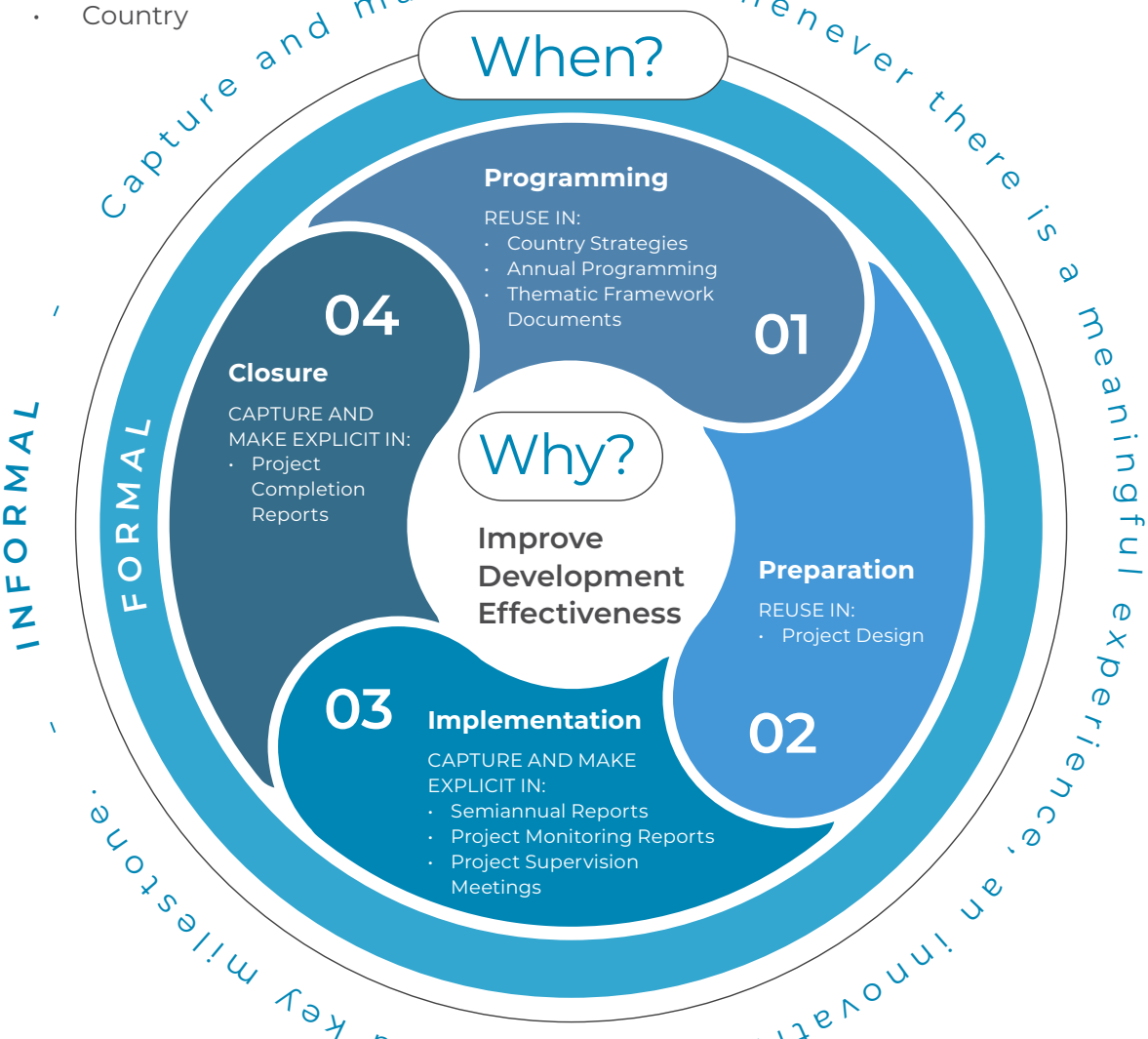
Types of Knowledge

- Sectoral
- Operational
- Country

Who?

Knowledge Sources and Users

- Internal
- External



How?

Key Enablers

- Knowledge Platform
- Capacity Building
- Lessons Writing Assistant
- Knowledge Sharing Methodologies

Transforming Tacit Knowledge into Lessons Learned

Team leaders are responsible for recording lessons learned in the formal documents for each IDB project. The format in which these lessons appear varies, depending on the context and phase of the project from which they emerge. Some examples include Country Strategies and Sector Framework Documents—now superseded by Thematic Framework Documents—Loan Proposals, Semiannual Reports, Progress Monitoring Reports, and Project Completion Reports. The formal phases in which lessons learned are generated and used are as follows:

Programming: country teams reuse lessons learned during this phase, including in-country strategies and annual programming documents. These insights help to anticipate sector or country-specific challenges, enabling them to design interventions and execution mechanisms informed by previous experiences.

Preparation: project team leaders reuse lessons learned to pinpoint actions or measures that may anticipate execution challenges, mitigate risks, or replicate successes.

Implementation: project teams capture and share insights, typically through Semiannual Reports, Progress Monitoring Reports, and supervision meetings.

Closure: project team leaders identify, document, and disseminate lessons learned from both the successful and unsuccessful aspects of implementation through Project Completion Reports. These reports include findings and recommendations to inform you about the design of future projects.

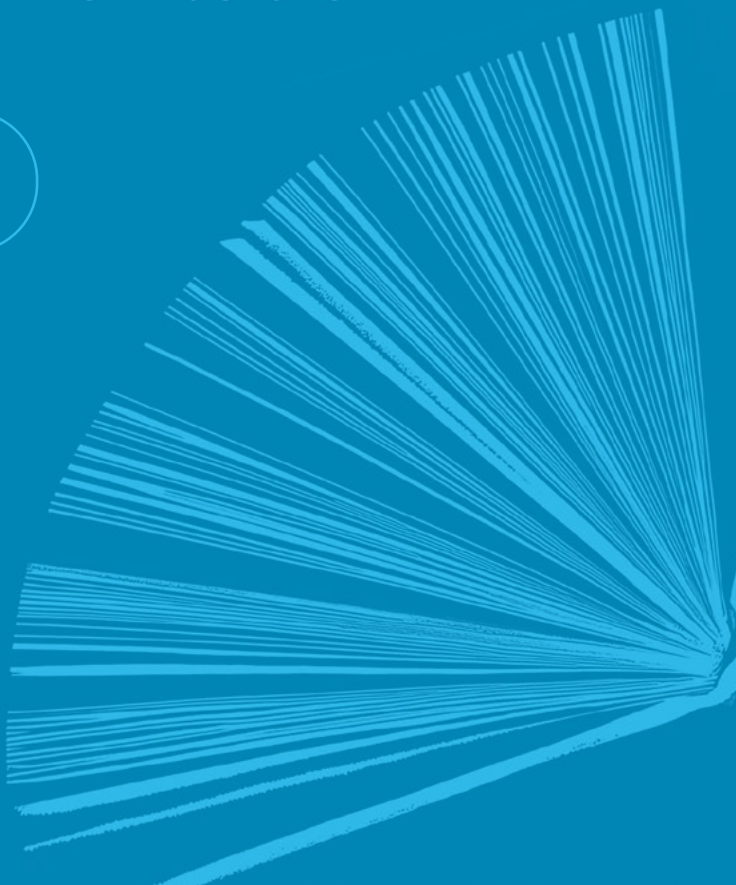
Generating lessons learned from informal, people-centered processes is crucial for harnessing tacit knowledge[2] and improving development effectiveness. Typical settings—such as workshops, webinars, and knowledge exchanges—encourage open dialogue and collaboration, bringing to the fore valuable operational lessons and insights, both quantitative and qualitative, that may not emerge through more formal channels. Engaging stakeholders directly in knowledge-sharing activities creates a friendly environment that promotes candid discussions of real experiences, practical solutions, and innovative approaches. The real-time feedback and iterative learning opportunities from these settings facilitate the gathering and transfer of tacit knowledge. Box 3 provides an example.

2 According to Nonaka and Takeuchi (1995), tacit knowledge includes mental models, beliefs, and perspectives so ingrained in individuals that they are often taken for granted. It contrasts with explicit knowledge, which can be easily codified, structured, articulated, documented, and shared. It is typically expressed in formal language and stored in tangible formats such as reports, databases, and guidelines. According to Snowden (2002), one of the key characteristics of this type of knowledge is that it is easily transferred.

"Operations Day supports generating solutions to the critical challenges faced by projects. Teams will gain practical knowledge validated by their peers and participate in exchanges to share lessons learned and promote effectiveness in project implementation"

GARCÍA FERRO, L.A., D. ZEPEDA, AND D. E. LARROTA ROJAS. 2023.

Guía para intercambios de conocimiento
Inter-American Development Bank.



BOX 3.

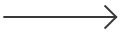
Superheroes of Development: Field-Tested Lessons from Executing Agencies and Clients

Each year, the IDB hosts *Superheroes of Development*, a competition that highlights the lessons learned among executing agencies. Approximately 85 teams submit stories that reflect not only their perseverance but also a deep commitment to learning, adaptation, and growth. These learning journeys offer critical insights into what does and does not work, and why. This competition creates a space for tacit knowledge systematization, helping ensure that the lessons learned (later captured in a dedicated publication) are shared widely. In doing so, individual knowledge becomes collective, turning isolated experiences into valuable guidance for practitioners across Latin America and the Caribbean and beyond. A powerful example is the Jamaica project described below.

Reviving a Stalled Project: The Yallahs and Hope River Basins in Jamaica

Context

The Yallahs and Hope River basins in Jamaica are vital watersheds, supplying over 40 percent of the potable water used in the Kingston Metropolitan Area. Their basins hold 7 percent of the land that is farmed on the island. The highest area is part of Blue and John Crow Mountains National Park, a wooded region from which various rivers descend, and is also home to endemic species of flora and fauna. Due to its exceptional biodiversity, the park has been named a UNESCO World Heritage Site. Human activity has been threatening the basins' integrity. Poor farming practices, wood extraction, mining, and the clearing of land to build homes have resulted in deforestation and degradation of biodiversity. A combination of erosion and intense rain has made the area more susceptible to flooding, landslides, and fires. In fact, a major fire impacted the basins' residents in 2015, causing US$3.7 million in damage in a matter of days. The IDB donation through the Global Environment Facility was worth almost the same amount (US$3.9 million).



Challenges

When the plan to protect these areas was designed, no one considered the complexity of coordinating actions and public policies among all of the institutions that had a role in the work. With six different agencies involved (the National Environment and Planning Agency, the Planning Institute of Jamaica, the Forestry Department, the Water Resources Authority, the National Water Commission, and the Rural Agricultural Development Authority) and no unifying mandate, coordination broke down. In addition, the project director changed three times during the design, approval, and implementation processes, which contributed to the lack of continuity.

Identifying the problem and generating evidence

The project team repositioned the initiative within Jamaica's National Development Plan, Vision 2030, framing it as a priority under Goal 13: Sustainable Management of Natural Resources. This alignment with national and Sustainable Development Goals elevated the project's visibility and urgency. As a result, the project was included in the 2018–2021 Public Policy Framework. Also, monitoring frequency increased from quarterly to monthly, while leadership and responsibility shifted to agencies with greater authority, reducing vulnerability to staff turnover. Coordination improved dramatically, and implementation accelerated. The first results were quickly visible. The project went from reforesting an area equivalent to just 100 football fields in 2017 to reforesting an area equivalent to approximately 1,000 football fields in July 2019. In addition, nearly 600 rural residents were trained in the best land management practices to prevent soil erosion and 400 were certified in smart farming activities. They even trained several communities in forest fire management, which avoided a tragedy in 2019 when another conflagration began to quickly spread. The flames were contained in time by residents of rural communities who had received proper training.

Key lessons learned

- A project can be successfully reactivated once its strategy for approaching stakeholders is completely overhauled.
- National alignment ensures institutional commitment. Embedding a project into a country's official development strategy increases ownership, boosts inter-agency cooperation, and ensures continuity, even amid political or staffing changes.
- Strategic communication can reset stalled initiatives. When institutional support is weak, repositioning the initiative through targeted lobbying and messaging, as was done by the National Environment and Planning Agency, can rebuild momentum without discarding earlier work.
- Stakeholder coordination must be designed, not assumed. Multi-agency projects require formal governance mechanisms, clarity of roles, and consistent engagement. Leadership must go beyond project management and include political and strategic alignment.
- Adaptability is essential to resilience. Reframing the initiative means building on past experience, diagnosing structural weaknesses, and adapting the strategy to ensure real institutional traction.

The informal nature of these processes encourages a more candid and early exchange of ideas and insights in safe spaces, breaking down hierarchical barriers and promoting peer learning. This approach is especially valuable for advancing a culture of continuous learning, from both failures and cancelled projects, emphasizing adaptability, reflection, trust, and collaboration, and allowing for nuanced discussions that go beyond what is typically documented in formal reports. In the informal processes, the Knowledge and Learning Division offers methodological guidance and support to various Bank organizational units for identifying, documenting, systematizing, and disseminating lessons learned according to the specific phase of the project cycle, whether for a portfolio or individual project.

Methodologies and Tools to Systematize and Disseminate Lessons Learned

METHODOLOGIES

Knowledge Exchanges are activities that promote peer-to-peer learning, enabling the identification of key elements, experiences, and best practices that help enhance technical knowledge (García Ferro, Zepeda, and Larrota Rojas, 2023).

Sectoral Deep Dives are activities that facilitate knowledge exchange among project team members and executing agencies. They include the analysis of operational documents of a specific social or economic thematic, identification of factors affecting the portfolio, sharing of the findings, and provision of insights to improve sector strategies and effectiveness.

What would you do? It is a methodology for sharing lessons based on real cases derived from the implementation of development projects, as narrated by the projects' protagonists. It provides an opportunity for teams who are facing similar challenges to engage in dialogue, exchange ideas on possible solutions, and identify lessons learned (Llaguno et al., 2018).

Operations Day is a workshop designed to enhance operational effectiveness by fostering the exchange of practical knowledge and lessons learned among executing agencies within a specific country project portfolio, enabling the identification of root causes and development of joint solutions to address cross-cutting implementation challenges. It focuses on improving the execution of active portfolios, emphasizing results-based management (García Ferro, Zepeda, and Larrota Rojas, 2023).

In-Action Review is a "learning while doing" technique that enables teams to identify quickly what is working and what is not. It captures lessons for immediate application, promoting prompt sharing and continuous improvement within projects (García Ferro et al., 2012a).

After-Action Review gathers and shares insights from a team's experience upon achieving a goal, completing a phase, resolving an issue, or closing a project. Through structured discussions, participants identify successes and failures and generate recommendations for improving future outcomes (García Ferro et al., 2012b).

Peer Assist is a facilitated workshop in which a diverse group of participants shares experiences and insights before deciding upon a specific course of action to deal with upcoming challenges of significant complexity, uncertainty, or risk (García Ferro et al., 2012c).

TOOLS: USING TECHNOLOGY TO COLLECT, SYSTEMATIZE, SHARE, AND REUSE LESSONS LEARNED

The IDB's Institutional Strategy emphasizes the need to strengthen its knowledge management approach through more efficient data collection, operational processes, and knowledge systems to more effectively and broadly disseminate lessons learned from both formal and informal experiences. The Bank is developing new tools to implement this approach.

IDB Knowledge Platform

The IDB Knowledge Platform is a digital solution—powered by artificial intelligence (AI)—designed to consolidate resources and facilitate the capture, systematization, and sharing of evidence-based knowledge. The platform offers the following key functionalities:

- **Open Search** is available to all users, including those who are not directly involved in loan operations, such as sector and regional economic advisors and knowledge generators, among others. Through this platform, the users receive AI-generated responses to their queries based on relevant institutional knowledge.

- **Contextualized knowledge** is tailored for team leaders and team members who are preparing or supervising loan operations. This functionality provides targeted information aligned with the specific stage and context of the operation, helping teams to improve project effectiveness.

Both functionalities generate content based on more than 30,000 institutional documents published since 2008. This includes all public documents such as Sector Framework Documents, Thematic

Framework Documents, Project Completion Reports, Country Strategies, and Loan Proposals. The platform will enhance the programming cycle, project preparation, and supervision by offering resources in the following areas:

Empowering teams to design more effective interventions. By providing tailored, easily accessible lessons learned and evidence from across the Bank's portfolio, the platform helps project teams ground their designs in what works, avoiding duplication and strengthening development impact.

Unlocking and scaling institutional knowledge. The platform increases the visibility and usability of lessons learned and operational insights, ensuring that the collective knowledge is leveraged across sectors, countries, and teams, maximizing its value across Latin America and the Caribbean and beyond.

Promoting continuous learning across the project's life cycle. By prioritizing knowledge from real operational experiences and integrating it into key decision points, the platform supports learning at every stage, from design to execution to evaluation.

Identifying knowledge gaps and informing future priorities. The Platform highlights not only the lessons learned but also what knowledge is still missing, guiding future research, investments, and collaboration opportunities.

Enabling new ways to access and reuse content through AI. Through generative AI, staff can openly ask questions and generate customized summaries, draft documents, and retrieve relevant content, transforming how knowledge is accessed, produced, and applied at scale.

"Knowledge exchanges are activities that promote peer-to-peer learning, enabling the identification of key elements, experiences, and best practices." / page 22

GARCÍA FERRO, ZEPEDA, AND LARROTA ROJAS, 2023

The Knowledge Platform securely streamlines the search process across the IDB, eliminating the need to navigate multiple sources and systems. By making lessons learned more accessible and visible, the platform supports project teams—particularly during the design phase—in identifying ways to mitigate risks or replicate successful past solutions. Users can trust the information, as it is sourced directly from the Bank itself, and rely on the platform's confidentiality, with any sensitive questions remaining internal.

Lessons Writing Assistant

The Lessons Writing Assistant is another digital solution developed to help IDB staff and executing agencies leverage operational knowledge. This tool guides users through key questions about their project experiences through AI technology. Based on the user's input and contextual data, the assistant refines and structures the responses to produce clear, actionable, and consistent findings and recommendations. The resulting lessons learned can be added to relevant project documents (e.g., Semiannual Reports, Project Completion Reports, and Progress Monitoring Reports) or used in other analyses. The assistant aims to accelerate operational learning by integrating it into the Bank's core systems and workflows. This will institutionalize the further generation of well-structured, actionable lessons, improving the quality and consistency of knowledge across all operations. Full integration of the assistant will embed learning into the project lifecycle, strengthening institutional memory and informing decisions.

Knowledge Graph

The knowledge graph serves as a standalone inventory of IDB knowledge products, detailing their context and connections and linking them across the various internal catalogs as well as to related external publications, such as journal articles. The graph uses taxonomy to provide conceptual structure and metadata to map

the relationships between knowledge products and their unique characteristics. This tool helps to generate reports and can inform other information systems to answer general or specific internal questions about IDB knowledge products. Other highlights include the following:

- Captures and links lessons learned across projects and sectors, making them easier to retrieve and analyze thematically or by context.
- Surfaces related cases and experiences, helping users identify patterns, avoid past mistakes, and build on proven approaches.
- Enhances institutional memory by preserving connections between implementation insights and formal knowledge outputs (e.g., evaluations, case studies, and technical notes).
- Enables cross-cutting analysis, such as comparing lessons across regions or sectors using metadata filters or AI-powered clustering.

In essence, the knowledge graph organizes and connects lessons learned and transforms them into actionable, reusable knowledge that supports better project design and policy development. The Bank will continue to incorporate cutting-edge technology into this tool and enrich it with relevant information.

Governance: Roles and Responsibilities in Lessons Learned Management

The effective leveraging of lessons learned depends on the active participation of Bank staff members and government counterparts according to their roles and responsibilities in implementing IDB projects.

Top leadership plays a vital role in ensuring lessons are systematically generated, shared, and reused to enhance their impact. IDB leaders must prioritize this process at every level, integrating it into strategic goals while fostering an adaptive and collaborative organization. These leaders are also responsible for reinforcing accountability by establishing mandates and policies that require project teams and other operational staff to document and apply lessons throughout the project cycle. In addition, leaders must create incentives that encourage staff to engage actively in knowledge sharing by linking recognition and career advancement to the effective systematization and reuse of high-quality lessons learned. Consistently emphasizing the strategic value of knowledge in driving learning and innovation, improving outcomes, and scaling up good practices will embed this process as essential to achieving development impact across the institution and the region.

IDB operational teams are central to the generation, documentation, and application of lessons learned throughout the project's life cycle. They are responsible for ensuring quality, robustness, systematic

documentation (e.g., through Loan Proposals, Progress Monitoring Reports, and Project Completion Reports), and accessibility of lessons learned throughout the project's life cycle. This responsibility extends to fostering a culture of knowledge sharing by disseminating lessons through both formal and informal settings, such as workshops, learning events and community of practices. This proactive approach prevents valuable insights from being siloed within individual projects and promotes broader institutional improvement. These teams also engage with project executing agencies and government counterparts to ensure lessons are revisited and integrated into new or ongoing projects, creating a bridge between knowledge and operational improvement. Their efforts enhance the effectiveness of the Bank's interventions over time.

Finally, the Bank's **counterparts** (e.g., project executing agencies and governments) play a crucial role in the effective collection, sharing, and application of lessons learned. As the primary source of real-time insights, they adapt interventions to local conditions and provide feedback that enhances implementation and sustainability. By contributing to institutional learning, they help strengthen the impact and adaptability of future development initiatives.

Advancing the IDB's Knowledge Agenda: The Future of Lessons Learned

The IDB is endowed with a diverse, engaged, and impact-focused workforce, supported by a culture centered on achieving meaningful outcomes. In particular, the Knowledge and Learning Division offers methodological guidance, systems, AI tools, and change management strategies to ensure high-quality lessons are effectively collected and applied, helping to strengthen development impact.

The Bank's new institutional strategy offers ample opportunities to introduce incentives that further promote knowledge systematization and sharing. The current trend is to equate documenting failures by assigning blame rather than recognizing that unexpected events and risks are inevitable. Sharing the lessons learned from these failures is essential to prevent future occurrences. Team leaders need adequate incentives to document openly what they learn through project design and implementation, exceeding the formal documentation requirements set with executing agencies. Moreover, the Bank aims to extend the reach and impact of its knowledge and learning efforts beyond internal staff. By collaborating more actively with external partners—such as government agencies, project executing units, and the private sector—the Bank will enrich the pool of shared insights and enhance its ability to influence broader development agendas in the region. Through initiatives in open knowledge sharing and strategic

partnerships, the Bank can position itself as a knowledge leader and catalyst for knowledge-based decision making across Latin America and the Caribbean.

Looking ahead, the Bank's role as a knowledge-driven institution will continue to evolve, requiring an adaptive approach to remain at the forefront of development effectiveness. One avenue for growth is the continued integration of cutting-edge technologies—such as AI and machine learning—into the Bank's knowledge management efforts. These tools will enable more sophisticated analysis of operational data, generate predictive insights, and identify emerging trends. By taking further advantage of AI, the IDB can increase the speed at which lessons are gathered, synthesized, and applied, enabling a more agile and responsive approach to development challenges.

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