# LEARN Stage Checklist

*Name of Initiative Here*

*This template will help to decide whether you are ready to apply for approval to move into the DESIGN stage, using a checklist of activities that need to be covered.*

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| **Have we completed all LEARN stage activities?** | |
| * Can we clearly articulate the purpose, scope and outcomes of the project (using the scoping template)? | * Has an audit been completed of the existing state (ie. what happens now in each area)? |
| * Have we consulted extensively at all 3 levels of the organisation, asking what do you need (using the engagement template)?   + Executive leadership/sponsors   + End-users/frontline/clients   + Department who will do the work | * Have we conducted the dreaming phase (using the dreaming template)? * Have we identified and analysed all the required needs, constraints, values, funding, legal & compliance requirements? |
| * Have we identified the measurements that will be used to determine when the objectives are met? | * Have we conducted a ‘root-cause analysis’ |

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| **Are we ready to move into the DESIGN stage?** | |
| * Have we analysed the learnings and data we’ve collected and clearly articulated the outcome? | * Do we feel confident that we have covered all aspects of learning, and that we have all the information we need to move into the DESIGN stage? |
| * Have we developed a clear list of design principles based on the learning?   *(Note, no model or design should have been developed at this stage. The design principles will provide the parameters for the DESIGN activities)* | * Is the whole group in agreement with the design principles? |
| * Can we provide a clear rationale for why the change should occur and what the benefits would be? | * Have we prepared a LEARN stage report to be submitted for approval? |
| **If the group has not been able to reach agreement**  Where a group has been unable to come to agreement on the design principles or the way forward, it may be necessary to approach the approval giving body for further direction.  In this case, the group is not going to the authorizing body for approval to proceed to design stage, but rather is seeking further direction on how to proceed with the LEARN stage in the face of disagreement.  The LEARN group should provide a full report to the authorizing body, outlining all activities to date, as well as details of the outstanding issues that have not been agreed.  The authorizing body may provide a number of options   * Give direction on what design principles will be used * Disband the group and assign another group * Provide further facilitation | |

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| **LEARN Stage Report** |
| In order to provide adequate information for the authorising body to approve moving into the DESIGN stage, a LEARN stage report should be provided, including the following: |
| **Details of all LEARN stage activities**   1. Overview of all LEARN activities, outcomes and design principles, including: 2. A rationale for why the change should occur, and what the benefits would be 3. Details of all activities conducted 4. A summary of the agreed learnings 5. Detailed agreed design principles 6. A statement of joint agreement, signed by all members of the LEARN group 7. An appendix of the following briefs:    1. A copy of the scoping work brief    2. A copy of the engagement document, with full details of all engagements that were conducted and the information gathered    3. Details of what was explored & discovered in the dreaming activity    4. A copy of the ‘root-cause’ and ‘cause-consequence’ analyses    5. A copy of the LEARN Stage checklist |