

Organizational Learning Self-Assessment Tool

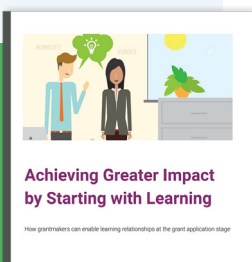
18 questions to self-assess your organization's learning culture and identify steps for action.

Developing a strong learning culture is vital to helping nonprofit and grantmaking organizations achieve their mission.

Organizational learning leads to innovation, better programming and improved organizational performance. It also sets the stage for better evaluation. However, defining a learning culture is not always easy. This self-assessment tool is meant to help organizations to identify and assess the state of learning in their organization. According to our research, learning organizations have the following qualities:

- ▶ Learning-oriented organizational habits and behaviours (i.e., formal and informal day-to-day practices, processes, and attitudes) that bring a learning culture to life.
- ▶ Strong leadership and strategic direction that supports, provides guidance, and prioritizes learning for staff and organizational processes.
- ▶ Resources and capacity to support learning, including tools for analyzing data and reflecting on it, time and space devoted to learning, and good communication processes.

A culture of learning, like any form of culture, is not something that can be reduced to a fixed number of statements or questions. Culture is always evolving and may be perceived differently by different staff members. As such, this tool is a starting point for discussion that can help identify areas of strength as well as areas for improvement. It is not intended to tell the complete story of learning in your organization.



The Organizational Learning Self-Assessment Tool is a companion resource to **Achieving Greater Impact By Starting with Learning: How Grantmakers Can Enable Learning at the Grant Application Stage.**

The Center for Nonprofit Excellence in the United States defines a **learning culture** as:



A learning culture exists when an organization uses reflection, feedback, and sharing of knowledge as part of its day-to-day operations. It involves continual learning from members' experiences and applying that learning to improve. Learning cultures take organizations beyond an emphasis on program-focused outcomes to a more systemic and organization wide focus on sustainability and effectiveness. It is about moving from data to information to knowledge.

NEXT: SUGGESTED STEPS FOR USE —>

How to use:



Take the survey (5-10 minutes): Depending on your context, it may be helpful to think about these questions in relation to a particular program/service or period of time. If your answer to a particular question doesn't perfectly align with the options provided, provide your best guess. Suggestions for consideration are included below each question. Feel free to use the comment box at the end of each section.



Pause and reflect (10 minutes): Think about your own answers. Think about your colleagues and whether they might agree or disagree with you. Ask yourself whether this survey would be good to share with others on your team. Keep in mind that there may be good reasons why things are a certain way in an organization. By asking these questions of your colleagues you may set an expectation that things may change in the short term. In other words, only proceed if you feel your colleagues are open to discussing as a team AND that there is a reasonable expectation that you and your colleagues are able to take action if the self-assessment highlights areas for improvement. To help with this process, see the Self-Reflection Questions section at the end of this document.



Take the next step:

- a. Try one (or more) of the 5, 15, or 30 minute actions found at the end of each section.** These short articles and resources offer a few suggestions for further action that may offer insights into how to improve your organization's learning culture.
- b. Share the survey with your colleague(s).** Set dedicated time to discuss any issues or questions that may arise from this process.
- c. Record and Publicize.** Consider documenting and sharing publicly (such as in an annual report) some of the activities and processes your team is doing to help promote learning and how that is leading to improvements in your organization's services and programs. If you have found something that works really well in your organization, there is a good chance another organization may also be able to benefit from what you learned.
- d. Share this tool with another organization.** Consider sharing this tool with a grant applicant/recipient, funder, or partner organization as a discussion starter to better understand how each other works and what each partner prioritizes, feels is a particular strength, or would like to improve on. Alternatively, pick some questions that you feel are particular strengths of your organization and which you may be able to share lessons from. It is not necessarily the final score that matters. Rather, this self-assessment tool can help to emphasize different aspects of organizational learning that you feel are important to focus on and develop in how you work with others and in how others outside your organization work with you.



Organizational Habits & Behaviours

Organizational habits and behaviours are the formal and informal day-to-day practices, processes, and attitudes of staff and board members that bring a learning culture to life.

On a scale of 1 to 5 with **1 meaning strongly disagree** and **5 meaning strongly agree**, how would you respond to the following statements regarding your organization's habits or behaviours?

1. My organization (or department or team) **makes time for sharing and reflection.**

1 2 3 4 5

▶ Brainstorming new ideas is encouraged. There is time to debrief after an event, program, or meeting occurs as needed to discuss what worked, what didn't, and possible next steps. When there is time for reflection, it is time well spent with good facilitation and opportunities for all relevant staff to contribute. There are opportunities to share and hear from others within the organization's normal day-to-day routine, with designated time and space. Examples may include lunch and learns or dedicated time at staff meetings.

2. My organization (or department or team) **engages outside stakeholders in the process of learning.**

1 2 3 4 5

▶ There are advisory groups for programs or projects that involve multiple partners such as service users/clients, other local organizations, or funders. There is regular contact with partners who are also engaged in conversations about learning. Outside stakeholders know who to go to for questions or to discuss an idea or issue. Outside stakeholders are valued for their contributions and are encouraged to share their ideas. The organization is willing to share what it has learned and any challenges it faced with others.

3. My organization (or department or team) **uses evaluation to learn.**

1 2 3 4 5

▶ Evaluation addresses important questions relevant to the work. Evaluation findings are discussed even when the findings are inconclusive or incomplete. Evaluation findings are used in decision-making.

4. My organization (or department or team) **handles setbacks well.**

1 2 3 4 5

▶ When things don't go as planned, there is space and time to talk through the issues. When unexpected information about our work comes up, it is considered. Mistakes or failures are acknowledged and openly discussed. They are not used to shame but seen as opportunities to improve. There is space for staff to share dissenting opinions.

5. My organization (or department or team) **is adaptable.**



▶ People throughout the organization are aware of the things that have been learned in the last year and how they informed practice. The organization is doing things differently than it did a year or two ago. There is a willingness to make small course corrections or big changes in program design when needed. When changes are implemented, they are based on evidence.

6. My organization (or department or team) **emphasizes strong communication.**



▶ Reports or findings are shared publicly, even if they reveal weaknesses or unexpected findings. It is clear who is responsible for capturing, distilling, applying, and sharing knowledge. Information is presented (most of the time) in an engaging way.

TOTAL SCORE DIVIDED BY 6:
eg. 24/6 = 4

Comments

Suggestions for Action



5 minutes or less actions

Do you have some information or data that others should know about, but aren't sure how to engage them in it? Why not try a data party? [This Community Solutions one-pager](#) offers some tips.

Are you curious about how to communicate when things don't go as planned? [This Fail Forward one-pager](#) offers some tips.



30 minute actions

Are you stuck on an issue or need to do some planning with others? [Explore the Liberating Structures library of facilitation techniques](#) to help stimulate discussion and arrive at particular goals.

Are you stuck on evaluation? [Check out this Ontario Nonprofit Network \(ONN\)](#) resource on how to make evaluation useful.

Looking for ways to communicate your impact? [This Ontario Nonprofit Network resource](#) and template has you covered.



Leadership & Strategic Direction

Leadership and strategic direction refers to the ways in which executive directors, board members, or senior managers inform and guide the direction of the organization or their department. It may also include the specific policies, strategic plans, or staff structures put in place by leadership.

On a scale of 1 to 5 with **1 meaning strongly disagree** and **5 meaning strongly agree**, how would you respond to the following statements regarding your organization's leadership?

7. My organization **has clear learning goals** that are relevant and well understood.

1 2 3 4 5

▶ These goals identify what the organization hopes to learn and why these things are important. They are tied to strategic plans and other key documents. Learning goals are frequently discussed and referenced by leaders. Learning goals evolve over time in response to experience.

8. My organization's leadership **promotes and rewards learning**.

1 2 3 4 5

▶ Completion of a project, program, or event is celebrated and discussed, with a focus on how the project has contributed to learning (as well as whether it met its objectives). Professional development is supported and encouraged. Sharing critical feedback is welcomed. There are incentives or rewards for those who promote learning.

9. My organization's leadership and strategic direction **values learning as part of organizational planning**.

1 2 3 4 5

▶ Learning is discussed in staff recruitment interviews or onboarding process. Leaders act as role models when it comes to a focus on learning. Staff or team structures are regularly reviewed to ensure that individual learning is shared with others.

10. My organization **considers its learning goals when planning for teams and projects**.

1 2 3 4 5

▶ Key learning indicators are identified. Learning goals or priorities are included in project work plans that align to the mission of the organization. Time is allocated to review learning goals and processes for projects and teams.

11. My organization's leadership **regularly reviews learning goals and processes** with individual staff members and teams.

1 2 3 4 5

▶ Staff meetings or performance reviews involve a discussion around learning goals and processes. Team building activities include some discussion of learning goals and processes.

12. My organization's leadership **provides opportunities for input.**



▶ Staff are encouraged to provide feedback to other staff. Staff are empowered to provide feedback to leadership (executive directors, board members, senior managers) where appropriate (e.g., staff are able to provide input on the development of strategic plans, staff are able to attend and participate in board meetings).

TOTAL SCORE DIVIDED BY 6:
eg. 24/6 = 4

Comments

Suggestions for Action



5 minutes or less action

Reach out to a peer at another organization. Arrange a time to chat or grab a coffee and learn about how another organization values leadership and what specific practices they may use.



15 minute action

[This Bridgespan Group article](#) outlines four actions that nonprofit leaders can take to transform organizational culture.

Leadership upheaval is real. Read this [Nonprofit Quarterly article](#) to understand how to prepare the next generation of leaders.



30 minute action

What leadership competencies are likely to be important in the future? [Read this Ontario Nonprofit Network \(ONN\) report](#) to find out.

Organizational Capacity & Resources

An organization that values learning puts tools and procedures into place to support learning. Organizational capacity and resources refers to the technical, physical, and financial resources in place to promote a culture of learning.

On a scale of 1 to 5 with **1 meaning strongly disagree** and **5 meaning strongly agree**, how would you respond to the following statements regarding your organization's capacity?

13. My organization (or department or team) has the **right tools to organize and manage information** in a way that supports learning.

1 2 3 4 5

- ▶ Information collection and storage is managed well. Tools may include online surveys, CRMs, or other digital databases as well as low-tech strategies such as bulletin boards or filing systems. It is easy to find, use, and communicate the information we gather. These tools are right-sized (i.e., neither too simple nor too complex) and the right staff are appropriately trained in how to use them.

14. My organization (or department or team) has the **right tools to reflect on and share lessons learned with colleagues**.

1 2 3 4 5

- ▶ These tools may include: templates; work plans, a dashboard, or collaborative writing/editing tools. There are processes or structures in place to ensure information is communicated in a timely manner (e.g., a communication or engagement plan). These tools are right-sized (i.e., neither too simple nor too complex) and the right staff are appropriately trained in how to use them.

15. My organization (or department or team) has a high degree of **staff expertise** when it comes to learning.

1 2 3 4 5

- ▶ Staff are comfortable with data collection and analysis processes. Staff receive training around things like learning from mistakes, listening to the reflections of others, or developing a new skill that would contribute to organizational learning.

16. My organization (or department or team) has adequate **resources (time and funding) available to support learning**.

1 2 3 4 5

- ▶ Professional development opportunities are available to staff that would support their learning. Funding is allocated to evaluation. Staff are encouraged to share and spend time reading relevant articles, reports, or other materials related to their field of work that would further their understanding of the issues they are working on.

17. My organization (or department or team) has **sufficient physical space or encourages staff to use external space** to brainstorm, debrief, or discuss progress as needed.

1 2 3 4 5

▶ Staff are able to leave their desk and move to a more conducive space for discussing, brainstorming, or reflecting on ideas as needed. It is easy for staff to find a place to meet and talk.

18. My organization's (or department's or team's) **staff structure** is appropriate to facilitate learning.

1 2 3 4 5

▶ Clear lines of communication between staff exist. It is easy to work with and get feedback from other staff as needed. Team size is appropriate for ensuring that necessary work gets done.

TOTAL SCORE DIVIDED BY 6:
eg. 24/6 = 4

Comments

Suggestions for Action



5 minutes or less action

Want to get a handle on what tools you can use to collect and analyze data? [Read this article by TechSoup.](#)

Did you know professional development is important? [Read this article by Nonprofit Quarterly.](#)

Want to know more about dashboards and how they can help? [This Council of Nonprofits blog post](#) can help direct you.



30 minute action

Change up how you hold meetings and try a walking meeting. [Beth Kanter explains how.](#)

Scoring

Please calculate your total score by adding from the below categories.

Organizational Habits & Behaviours =

Leadership & Strategic Direction =

Organizational Capacity =

0 to 3

Learning is not currently seen as a high priority in your organization/department.

Suggestions for next steps: Let's start with the basics. Why is organizational learning important and how can it help you, your team, and your organization to do its work better? [Watch this four minute video](#). Want to go deeper? [Read this ten minute article](#).

4 to 7

Your organization/department has some good learning practices, but strengthening the overall learning culture may require more work.

Suggestions for next steps: A first step may be to get some people together to talk about what's really going on. For some ideas on how to create well-functioning teams, [read this three minute article](#). Wondering what some of the barriers might be? [Read this five minute article](#).

8 to 11

Your department/organization has some thoughtful learning practices embedded and is on the right track to developing a strong learning culture, but still has some work to do.

Suggestions for next steps: Check out the [Readiness for Organizational Learning and Evaluation Instrument \(ROLE\)](#) to go deeper on some of the issues that were explored in this self-assessment.

12 to 15

Congratulations! Your department/organization has a strong learning culture. There is a deliberate and conscious attempt to value and prioritize learning throughout the organization/department.

Suggestions for next steps: Was there one area where you scored lower? Maybe it's time to do a group activity or some team building to both celebrate and discuss your team's culture as a group. Perhaps if you are a board member, executive director, or senior manager, now is the time to look at what professional development opportunities might exist to strengthen an area that needs improvement. If you can, you may want to set aside some money to help strengthen capacity for future learning opportunities.

Self-Reflection Questions

Now that you have completed the self-assessment, consider the following reflective questions. These questions are prompts to help you determine what potential action you might take next. These are not intended to be used in a judgmental way or to cast blame on others, but rather to highlight where the opportunities are.

Keep in mind that your colleagues or partners may have different experiences, backgrounds, relationships, and ideas related to the work of the organization and how the organization itself functions. **The goal in doing this exercise should be to promote shared understanding and identify where improvements can be made, while recognizing that learning is a process and can take time.**

1. Can you provide a recent example where learning led to new insights? How did this learning occur? I.e., what were the steps that took place that enabled that learning to take place? (Point form is fine)

2. What, if anything, surprised you about your responses to the self-assessment?

3. What, if anything, do you think other staff would agree or disagree with you on? Why?

4. What, if anything, are you unsure about how other staff would answer?

5. Where do you feel there are opportunities to improve or develop a strong learning culture within your organization?

6. What are the barriers to improving or developing a strong learning culture within your organization?

7. Thinking about your relationships with external partners (e.g., a grant applicant/recipient, a funder, a partner organization), in what ways can your learning culture inform your ability to work more effectively and learn with them?

Acknowledgements

This document was created by Andrew Taylor and Ben Liadsky at Taylor Newberry Consulting (www.taylornewberry.ca). It is part of a suite of products and resources designed to help grantmakers and nonprofits to better understand and support one another's learning goals. This work was funded by Wellspring Philanthropic Fund. This project builds on previous work to develop a [Sector Driven Evaluation Strategy](#) in collaboration with the Ontario Nonprofit Network (ONN).