



# Organizational Learning Question Bank

The Question Bank is a companion resource to **Achieving Greater Impact By Starting with Learning: How Grantmakers Can Enable Learning at the Grant Application Stage.**

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## Background

Organizations that are impactful aren't necessarily the ones that gather the most evaluation data or use the most sophisticated methodologies. They are the ones that are good at translating their evaluation findings (and other kinds of information) into insight and action. In other words, they have strong organizational cultures of learning. Organizations with strong learning cultures reach outside their own walls to listen and learn from partners. This is particularly true for grantmakers who are reliant on partnerships with grantees to make an impact. If grantmakers are to build strong learning cultures themselves, learning together with grantees is key.

For grantmakers who want to focus on shared learning, the grant application stage offers an early opportunity to learn from potential grantees about the work they do, the issues in their community as they hear them, and the culture of their organization. An early emphasis on developing learning relationships can have great value for grantmakers as it may ultimately lead to supporting organizations that are highly effective. This in turn may lead to greater long-term success as both the grantee and the grantmaker learn together and share in their goals and development of next steps.



**Achieving Greater Impact  
by Starting with Learning**

How grantmakers can enable learning relationships at the grant application stage

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

The questions in this question bank fall into three broad categories that emerged out of our research on the key qualities of learning organizations.

- ▶ 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.
- ▶ Organizational capacity and resources to support learning, including tools for analyzing data and reflecting on it, time and space devoted to learning, and good communication processes.

Within each of these categories, the question bank offers subcategories and indicators designed to provide further clarity and to bring the elements of a learning organization to light in practical and operational ways.



**Questions can be like a lever you use to pry open the stuck lid on a paint can...If we have a short lever, we can only just crack open the lid on the can. But if we have a longer lever, or a more dynamic question, we can open that can up much wider and really stir things up...If the right question is applied, and it digs deep enough, then we can stir up all the creative solutions.**

— FRAN PEAVEY

**Found in *The Art of Powerful Questions: Catalyzing Insight, Innovation, and Action***

# Using the Question Bank

In order to develop a deeper understanding of the culture within an organization and the way it approaches learning, users of the Question Bank should feel free to draw from questions in each category. Not all subcategories may carry the same importance in every context. Similarly, not all questions within each subcategory need to be asked. Instead, the subcategories can be seen as a guide (think of it as being similar to a keyword search) to help determine the type of questions to be asked.

Each category consists of a few descriptor sentences (indicators) intended to operationalize what a subcategory could look like in practice at its ideal. For example, under the subcategory: “Makes time for sharing and reflecting”, the indicator is “brainstorming and reflection are seen as important and time is set aside for each.” Therefore, it could be said that an organization that has regular meetings to debrief on recent events, for example, is partly satisfying this particular indicator or quality that is present in learning organizations.

Some of these questions can be used in a grant application template or in a more informal conversation with a potential grant recipient. They may also be useful internally for discussing or reviewing a grant application. Users should also see this guide as flexible. It can be adapted to meet your needs. Potentially, with use and testing, those questions that are identified as being more useful for your organization could be highlighted and prioritized to make it easier to create useful templates.

A sample template is provided at the end of this question bank to give an example of how you may use this tool.



# 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.

**Good learning habits demonstrate a willingness to share and reflect, and an ability to deal with change and get outside of comfort zones. There are six categories of questions in this section.**

An organization with strong learning habits and behaviours:

- ▶ **Makes time for sharing and reflecting**
- ▶ **Engages outside stakeholders**
- ▶ **Values evaluation**
- ▶ **Handles setbacks well**
- ▶ **Is highly adaptable**
- ▶ **Has strong communication processes**

# 1

## Makes time for sharing and reflecting

Sometimes, our day-to-day work is too focused on continually doing. Organizations with strong learning cultures realize that pausing, sharing, and reflecting with others can lead to new insights.



### Indicators

Brainstorming and reflection are seen as important and time is set aside for them.

### Here are some question ideas

- a.** How does your organization reflect on recent work?
- b.** In what ways do learning, brainstorming, or sharing take place within your organization (e.g., dedicated meeting agenda item, staff encouraged to block off time for brainstorming, etc.)?
- c.** What are the main opportunities for staff to share and reflect on their work with others?
- d.** Can you provide an example of a time when you or your staff made time to pause and reflect on a program or project? What was the reason? What was learned?

### Add your own:

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# 2

## Engages outside stakeholders

Learning happens in interaction, not in isolation, and often the best insights can come from conversations between those who have different experiences or points of view. Organizations with strong learning cultures involve outsiders in their learning process.



### Indicators

The organization seeks to learn from and test assumptions with the help of others outside the organization.

### Here are some question ideas

- a.** In what ways does your organization involve others in gathering feedback or input (i.e., funders, other nonprofits, clients/service users, community members, board members, etc.)?
- b.** Does your organization have an advisory group or committee for this project or program? If yes, how does this advisory group help to inform your work?
- c.** In what ways does your organization engage with project or program partners (e.g., do you have monthly meetings)?
- d.** Does your organization participate in relevant communities of practice or networks?

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# 3

## Values evaluation

Organizations with strong learning culture see evaluation as a tool for learning and action. They understand that evaluation requires thoughtful consideration and planning.



### Indicators

Evaluation is seen as an important tool for learning and valued by staff.

Evaluation helps inform decision-making.

### Here are some question ideas

- a.** How does your organization typically clarify the purpose and outcomes of your programs? For example, do you use a theory of change or logic model?
- b.** Does your organization have a staff member or staff members responsible for learning, research, or evaluation?
- c.** Does your organization use external evaluators? Why or why not?
- d.** How many of your programs, projects, or operations are evaluated?
- e.** Do you typically find evaluations to be helpful? Why or why not?
- f.** How do you go about extracting useful insights from evaluation?
- g.** Can you share an example of what was learned from a recent evaluation?

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# 4

## Handles setbacks well

Programs or projects — particularly new ones — rarely go exactly as planned. When setbacks occur, the real test of an organization with a strong learning culture is how well they handle them.



### Indicators

Failures, mistakes, or setbacks are openly discussed in constructive ways within the organization.

Failures, mistakes, or setbacks are communicated to external partners.

### Here are some question ideas

- a.** How does your organization deal with setbacks or disappointment?
- b.** What does your organization do with results that you were not expecting? How do you decide what to do next?
- c.** How does your organization create a safe space for staff to share dissenting opinions?
- d.** Can you give an example of a time where something didn't work as planned and what was learned from that experience?

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# 5

## Is highly adaptable

Organizations with strong learning cultures recognize that they are often working on complex issues and in rapidly changing environments. They understand that what worked one, two, or five years ago may not be the solution that they need today and are able to be responsive to what they are learning as they go.



### Indicators

Implements changes based on what was learned.

Uses evidence to inform the type of change needed.

Change is embraced and supported.

### Here are some question ideas

- a.** What has your organization learned in the last year about its work and the impact of that work?
- b.** What, if anything, is your organization doing differently now as a result of what it has learned? (May include changes to the delivery of existing programs, creation of new programs, or adapting them) What do you plan to do differently in the future?
- c.** How do you create space in your organization to experiment or try different approaches?
- d.** How are decisions made when it comes to deciding next steps or revisions?
- e.** Can you share an example of a recent pilot project that your organization has run?

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# 6

## Has strong communication processes

Organizations with strong learning cultures communicate what they are learning and engage with others. They do this to be transparent, to share their learning journey, and to build or deepen relationships with other partners. They are able to distill key messages and package them in various ways designed to be useful and engaging for different kinds of audiences. They use discretion to avoid misunderstandings or violating the confidentiality of staff or clients.



### Indicators

Reports or findings are made public and are easy to access.

The organization has clear processes for sharing information.

### Here are some question ideas

- a.** How do you typically communicate what you are learning internally, to staff and volunteers?
- b.** How do you communicate what you are learning to partners (e.g., funders, other organizations, etc.) or the general public? For example, does your organization publish regular reports, blogs, infographics, etc. or give presentations that speak to lessons learned?
- c.** How do you decide what information to share?
- d.** What challenges do you face in sharing what you have learned?

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## 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 as a whole or their department. It may also include the specific policies, strategic plans, or staff structures put in place by leadership.

**Strong leadership is crucial to the long-term success of any organization. The decisions and leadership style of executive directors, board members, or senior managers goes a long way to influencing how other staff function and by extension the degree to which learning is enabled and encouraged in the organization as a whole. There are three categories of questions in this section.**

An organization with strong leadership and strategic direction:

- ▶ **Develops learning goals and processes**
- ▶ **Provides opportunity for input**
- ▶ **Promotes and rewards learning**

# 1

## Develops learning goals and processes

Learning goals are different from outcome or impact goals. For example, “reducing youth homelessness” is an outcome goal, while “developing more meaningful ways to engage youth in our decision making process about our homelessness work” is a learning goal. Developing learning goals and processes helps an organization to build its learning culture.



### Indicators

Learning strategies are evident.

Staff job descriptions or work plans include evidence of learning priorities.

Key learning goals are identified.

### Here are some question ideas

- a.** As an organization, what are you most interested in learning right now? What are your organization’s learning goals or processes (e.g., in a strategic plan)?
- b.** How does your organization (i.e., board, staff) use evidence when making decisions?
- c.** How do you keep learning goals front of mind? How often does your organization review strategic priorities?
- d.** How do you make people aware of and committed to the mission of the organization?

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# 2

## Provides opportunity for input

For organizational learning to take place, all staff must be empowered to share and provide input based on their own individual learning.



### Indicators

Feedback loops are established.

Ongoing engagement with other staff, partners, or relevant stakeholders is encouraged and prioritized.

### Here are some question ideas

- a.** In what ways does your organization gather feedback from staff?
- b.** How often do staff meet to talk or reflect on the project or program progress?
- c.** In what ways does your organization gather feedback from external partners?
- d.** In what ways does your organization provide feedback to funders?

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# 3

## Promotes and rewards learning

Providing incentives for staff to engage in learning is an important part in creating strong learning cultures. Incentives don't necessarily refer to financial benefits, but can also include positive reinforcement or allowing for specific staff time to be focused on learning.



### Indicators

Managers or leaders support staff in conversations using evidence.

### Here are some question ideas

- a.** In what ways are staff members supported to participate in data analysis, provide feedback, share new ideas, etc. (i.e., by building expectations into job descriptions, allowing staff time to focus on this, focused meetings, etc.)?
- b.** How do you celebrate learning accomplishments (e.g., project goals, final reports completed, etc.)?
- c.** In what ways does your organization support staff to improve their skills?

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## 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.

**A well-run learning organization has the right tools and expertise at its disposal and is continually looking to create the conditions in which those tools and expertise can be leveraged to enable learning. There are three categories of questions in this section.**

An organization with strong organizational capacity & resources has:

- ▶ **Systems and processes**
- ▶ **Staff expertise**
- ▶ **Financial resources**

# 1

## Systems and Processes

Increasingly, organizations with strong cultures of learning are utilizing various tools to help them gather and make sense of information relevant to their work.



### Indicators

Data collection and analysis processes are in place.

Data collection and analysis software is in place.

### Here are some question ideas

- a.** What sources of information do staff use to stay on top of the issues of concern to your organization?
- b.** In what ways does your organization collect data and stories?
- c.** How do you share information useful for learning within your organization? Do you use a dashboard of some kind? Email distributions? A bulletin board?
- d.** How easy is it to access data or reports? What challenges do you face in making use of this kind of information?
- e.** How does your organization reflect on recent work?
- f.** How does your organization monitor ongoing programs or projects?

### Add your own:

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# 2

## Staff Expertise

Having the right staff in place is often easier said than done. However, being deliberate about how learning will be prioritized starting from the hiring phase, to supporting professional development, to potentially supporting staff advancement in the organization or in the field is important to creating the conditions for individual staff learning to transfer up to organizational learning.



### Indicators

Staff are comfortable with data collection, using databases, asking evaluative questions.

Evaluation and learning are part of some or all staff responsibilities.

Staff support one another (mentoring).

Staff are trained in learning from mistakes.

### Here are some question ideas

- a.** How often do staff participate in networks, events, or forums for sharing information (e.g., relevant listservs, conferences, roundtables, etc.)?
- b.** In what ways are staff cross-trained to perform various job functions?
- c.** In what ways does your organization create a culture of learning among staff?
- d.** Do (relevant) staff have training in data collection or using databases?
- e.** Who is responsible for learning and evaluation in your organization and what are their qualifications? If you do not have dedicated staff, do you foresee a need to hire someone with this expertise?
- f.** In what ways are staff being continually developed for future roles in the organization?

### Add your own:

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# 3

## Financial Resources

Creating a strong organizational learning culture requires intent and planning. Making learning a priority requires investment. This can be a significant challenge for nonprofit organizations. However, talking about the ways an organization invests in learning can be a great way to open up discussion.



### Indicators

Professional development opportunities are available to staff.

Staff are supported to learn and develop their skill set.

Funding is allocated to support evaluation.

### Here are some question ideas

- a.** In what ways does your organization support staff to improve their skills?
- b.** How does your organization invest in evaluation (in terms of money, staff time, technology, or other resources)?
- c.** How much or what percentage of your organization's/program's budget is dedicated to professional development?
- d.** What kinds of professional development opportunities does your organization see as most valuable?

### Add your own:

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# Sample Template

Below is an example of one way questions from the Question Bank can be used. In this example, a few questions are drawn from the three sections (in some cases edited for appropriateness) and added to a formal grant application.

## Grant Application - Learning Section:

**1.** Can you give an example of a time where something didn't work as planned and what was learned from that experience?

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**3.** How do you communicate what you are learning to partners (e.g., funders, other organizations, etc.) or the general public? For example, does your organization publish regular reports, blogs, infographics, etc. or give presentations that speak to lessons learned?

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**2.** How are decisions made when it comes to deciding next steps or revisions?

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**4.** As an organization, what are you most interested in learning right now? What are your organization's learning goals or processes (e.g., in a strategic plan)?

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**5.** In what ways does your organization gather feedback from external partners?

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**7.** What kinds of professional development opportunities does your organization see as most valuable?

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**6.** What relevant communities of practice or networks is your organization participating in?

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# Explaining how this template was created

The following questions were used from the Question Bank:



**Drawing from the indicators in the Question Bank, I am hoping these questions will help provide clarity to me regarding how the organization:**

- ▶ Embraces change (Organizational Habits & Behaviours)
- ▶ Uses evidence to inform the type of change that is needed (Organizational Habits & Behaviours)
- ▶ Shares information (Organizational Habits & Behaviours)
- ▶ Prioritizes learning (Leadership & Strategic Direction)
- ▶ Engages with external stakeholders (Leadership & Strategic Direction)
- ▶ Promotes continuous staff development (Organizational Capacity & Resources)

**Post-application discussion and review process:**

- ▶ What questions produced insightful responses?
- ▶ Which questions were not particularly insightful?
- ▶ Are there other questions we should be asking instead? If yes, which ones? Do they need to be asked as a follow up before a decision is made on the grant applicant?
- ▶ Are there other times or ways (such as through a one-on-one phone call or via our website) that we should be asking a particular question or providing background information?
- ▶ If needed, what will be our process for changing the grant application template in the future? (I.e., which staff need to be involved and when, should/can we get feedback from past applicants, etc.) What criteria will we use for determining which questions will be used instead and when they will be asked?

## Summary of Questions

## 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.

### 1. Makes time for sharing and reflection

**a.** How does your organization reflect on recent work?

**b.** In what ways does learning, brainstorming, or sharing take place within your organization?

**c.** What are the main opportunities for staff to share and reflect on their work with others?

**d.** Can you provide an example of a time when you or your staff made time to pause and reflect on a program or project? What was the reason? What was learned?

### 2. Engages outside stakeholders

**a.** In what ways does your organization involve others in gathering feedback or input?

**b.** Does your organization have an advisory group or committee for this project or program? If yes, how does this advisory group help to inform your work?

**c.** In what ways does your organization engage with project or program partners?

**d.** What relevant communities of practice or networks is your organization participating in?

### 3. Values evaluation

**a.** How does your organization typically clarify the purpose and outcomes of your programs? For example, do you use a theory of change or logic model?

**b.** Does your organization have a staff member or staff members responsible for learning, research, or evaluation?

**c.** Does your organization use external evaluators? Why or why not?

**d.** How many of your programs, projects, or operations are evaluated?

**e.** Do you typically find evaluations helpful? Why or why not?

**f.** How do you go about extracting useful insights from evaluations?

**g.** Can you share an example of what was learned from a recent evaluation?

#### **4. Handles setbacks well**

**a.** How does your organization deal with setbacks or disappointment?

**b.** What does your organization do with results that you were not expecting? How do you decide what to do next?

**c.** How does your organization create a safe space for staff to share dissenting opinions?

**d.** Can you give an example of a time where something didn't work as planned and what was learned from that experience?

#### **5. Highly adaptable**

**a.** What has your organization learned in the last year about its work and the impact of that work?

**b.** What, if anything, is your organization doing differently now as a result of what it has learned? What do you plan to do differently in the future?

**c.** How do you create space in your organization to experiment or try different approaches?

**d.** How are decisions made when it comes to deciding next steps or revisions?

**e.** Can you share an example of a recent pilot project that your organization has run?

#### **6. Strong communication**

**a.** How do you typically communicate what you are learning to staff and volunteers?

**b.** How do you communicate what you are learning to partners or the general public?

**c.** How do you decide what information to share?

**d.** What challenges do you face in sharing what you have learned?

## 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 as a whole or their departments. It may also include specific policies, strategic plans, or staff structures put in place by leadership.

### 1. Develops learning goals and processes

**a.** As an organization, what are you most interested in learning right now? What are your organization's learning goals or processes?

**b.** How does your organization use evidence when making decisions?

**c.** How do you keep learning goals front of mind? How often does your organization review strategic priorities?

**d.** How do you make people aware of and committed to the mission of the organization?

### 2. Provides opportunity for input

**a.** In what ways does your organization gather feedback from staff?

**b.** How often do staff meet to talk or reflect on the project or program progress?

**c.** In what ways does your organization gather feedback from external partners?

**d.** In what ways does your organization provide feedback to funders?

### 3. Promotes and rewards learning

**a.** In what ways are staff members supported to participate in data analysis, provide feedback, share new ideas, etc.?

**b.** How do you celebrate learning accomplishments?

**c.** In what ways does your organization support staff to improve their skills?

## 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.

### 1. Systems and processes

**a.** What sources of information do staff use to stay on top of the issues of concern to your organization?

**b.** In what ways does your organization collect data and stories?

**c.** How do you share information useful for learning within your organization? Do you use a dashboard of some kind? Email distributions? A bulletin board?

**d.** How easy is it to access data or reports? What challenges do you face in making use of this kind of information?

**e.** How does your organization reflect on recent work?

**f.** How does your organization monitor ongoing programs or projects?

### 2. Staff expertise

**a.** How do staff participate in networks, events, or forums for sharing information?

**b.** In what ways are staff cross-trained to perform various job functions?

**c.** In what ways does your organization create a culture of learning about staff?

**d.** Do (relevant) staff have training in data collection or using databases?

**e.** Who is responsible for learning and evaluation in your organization and what are their qualifications? If you do not have dedicated staff, do you foresee a need to hire someone with this expertise?

**f.** In what ways are staff being continually developed for future roles in the organization?

### 3. Financial Resources

**a.** In what ways does your organization support staff to improve their skills?

**b.** How does your organization invest in evaluation?

**c.** How much or what percentage of your organization's/program;s budget is dedicated to professional development?

**d.** What kinds of professional development opportunities does your organization see as most valuable?

## Acknowledgements

This document was created by Andrew Taylor and Ben Liadsky at Taylor Newberry Consulting ([www.taylornewberry.ca](http://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).