

Organizational Learning Self-Assessment Tool V1.0

A simple set of questions to self-assess your organization's learning culture and identify steps for action.

2018



According to the literature, learning is often linked to or leads to greater innovation, better programming or responsiveness, and improved organizational performance. It is also seen as a precursor to better evaluation. In short, developing a strong learning culture is vital to helping nonprofit organizations achieve their mission. 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.
- Strong leadership that supports and prioritizes learning in both supporting staff and organizational processes.
- Significant capacity in terms of systems/processes, expertise, and resources to identify, analyze, and reflect on data and what was learned.

Our research has shown that defining a culture of learning is not something that can be reduced to set a number of statements or questions. Rather it includes a number of somewhat intangible factors and may also be perceived differently by different staff members. As such, this tool is a starting point, but it is not intended to tell the complete story of learning in your organization. Instead, it can be seen as one tool to help identify areas of strength as well as areas for improvement.

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 more systemic and organization wide focus on sustainability and effectiveness. It is about moving from data to information to knowledge.”

Suggested steps for use

1. Take the survey on your own first. 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 in brackets for most questions). You can elaborate further in the comment boxes below each section.
2. Pause. 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 team you may set an expectation with your team that things may change in the short term. In other words, only proceed to step three 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 step, see the Self-Reflection Questions section at the end of this document.
3. Share the survey with your colleagues and set dedicated time to discuss any issues or questions that may arise from this.
4. 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 the services and programs your organization offers. 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 your learnings.
5. Let us know what you think about this tool by [completing this short survey](#). What’s missing? What could be improved? What did you like?



Organizational Habits and Behaviours

Organizational habits and behaviours are those qualities that help inform an organization's learning culture. These habits and behaviours may be written down in formal documents (such as strategic plans), but more commonly are reflective of the practices, processes, and attitudes of staff and board members.

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 handles failure well and is open to change (e.g., adapts to setbacks, unexpected developments, mistakes and failures are openly discussed, etc.).	1	2	3	4	5	N/A
2. My organization is adaptable (e.g., there is a willingness to make course corrections, we implement changes based on evidence, pilot new ideas, etc.).	1	2	3	4	5	N/A
3. My organization makes time for sharing and reflection (e.g., there is time for brainstorming, debriefs, this time is well facilitated and organized, all relevant staff members are involved etc.).	1	2	3	4	5	N/A
4. My organization engages outside stakeholders (e.g., there are advisory groups for programs or projects, there is regular contact with partners, etc.).	1	2	3	4	5	N/A
5. My organization values evaluation (e.g., evaluation is part of decision-making, resources are dedicated to evaluation, etc.).	1	2	3	4	5	N/A
6. My organization emphasizes strong communication (e.g., reports or findings are publicly shared, reports or findings are easy to access, etc.).	1	2	3	4	5	N/A

Comments (Is there anything you wish to elaborate on from the previous section?)



Leadership

Leadership refers to the decisions made by executive directors, board members, or senior managers that help to inform and guide the direction of the organization or departments.

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's leadership develops learning goals and processes for individual staff (e.g., key learning indicators are identified, learning goals/priorities are included in job descriptions, professional development opportunities are discussed, etc.).	1	2	3	4	5	N/A
8. My organization's leadership develops learning goals and processes for teams and projects (e.g., key learning indicators are identified, learning goals/priorities are included in project work plans, time is allocated to review of those goals, etc.).	1	2	3	4	5	N/A
9. My organization's leadership regularly reviews learning goals and processes with individual staff members and teams.	1	2	3	4	5	N/A
10. My organization's leadership provides opportunities for input (e.g., staff are encouraged to provide feedback, etc.).	1	2	3	4	5	N/A
11. My organization's leadership promotes and rewards learning (e.g., learning achievements are acknowledged, professional development is supported and encouraged, sharing negative feedback is encouraged, etc.).	1	2	3	4	5	N/A
12. My organization's leadership values evaluation as part of organizational planning (e.g., learning is discussed in strategic plans, staff recruitment, etc.)	1	2	3	4	5	N/A

Comments (Is there anything you wish to elaborate on from the previous section?)



Organizational Capacity and Resources

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 has the right tools to organize and manage information in a way that supports learning (e.g., information storage software, CRMs, data collection software, etc.).	1	2	3	4	5	N/A
14. My organization has the right tools to reflect on and share lessons learned and share with colleagues (e.g., templates, workplans, dashboards, collaborative writing/editing tools, etc.).	1	2	3	4	5	N/A
15. My organization has a high degree of staff expertise when it comes to learning (e.g., staff are comfortable with data collection and analysis, evaluation is part of some staff job descriptions, staff are trained in learning from mistakes, etc.).	1	2	3	4	5	N/A
16. My organization has adequate resources available to support learning (e.g., professional development opportunities are available to staff, funding is allocated to evaluation, etc.).	1	2	3	4	5	N/A
17. My organization has sufficient physical space or encourages staff to use external space to brainstorm, debrief, discuss progress, etc. as needed.	1	2	3	4	5	N/A
18. My organization's staff structure is appropriate to facilitate learning (e.g., clear lines of communication exist, it is easy to work with and get feedback from other team members as needed, team size is appropriate, etc.)	1	2	3	4	5	N/A

Comments (Is there anything you wish to elaborate on from the previous section?)



Bonus Questions

19. Can you provide a recent example of a time 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)

20. Do you believe that others in your organization would have a similar understanding of your organization's learning culture as you have indicated in your responses above?

Yes No Unsure

21. What new insights emerged from using this tool? What steps, if any, might you take as a result of this tool to further encourage a culture of learning in your organization?



Scoring

Organizational Habits/Behaviours / 6 =	Leadership / 6 =	Organizational Capacity and Resources / 6 =
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Bonus Questions

Q19 >> Give yourself 1 point if you are able to answer this question clearly and with detail within 5 minutes.

Q20 >> Give yourself 1 point if you answered 'yes'.

Q21 >> Give yourself 1 point if you were able to think of some concrete actionable next steps to promote a culture of learning in your organization.

Total (Add score from the above categories):

Score

5 or below	6-10	11-16	17 or above
Learning is not currently a priority in your organization.	Your organization has some good learning practices, but needs to spend some time thinking more holistically about how learning can be better supported.	Your organization is on the right track to developing a strong learning culture, but still has some work to do.	Your organization has a strong learning culture.



Self-Reflection Questions

The following are a few questions to consider now that you have completed the self-assessment. These questions should be seen as prompts to help you determine what potential action you might take next. It is not intended to be used in a judgmental way or to cast blame on other colleagues, but rather to highlight where the opportunities are. Keep in mind that your colleagues 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 more broadly as a team 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. What, if anything, surprised you about your responses?
2. What, if anything, do you think other staff would agree or disagree with you on? Why?
3. What, if anything, are you unsure about how other staff would answer?
4. Where do you feel there are opportunities to improve or develop a learning culture within your organization?
5. Where do you feel there are not opportunities to improve or develop a learning culture within your organization? What are the barriers?
6. What are the risks if you were to discuss with your colleagues your organization's policies and practices to support learning?



Resources

Several additional tools and resources for assessing organizational learning culture (or elements of a learning culture like evaluation) can be found online. Each has a particular niche and speaks to a particular element of organizational learning and may be useful starting points to gain further knowledge about your organization's learning culture or develop some practical strategies and actions for improvement.

Self-assessments

[Getting your organization ready to do evaluation - Part 2](#)
Superu

A self-assessment questionnaire focused on the context that shapes your organization, the organization itself, and the people/individuals who make up the organization. The questionnaire is designed to be completed by all relevant staff for the purposes of having a conversation afterward about the results.

[The Learning Organization Survey](#)
Harvard Business Review

A self-assessment survey for employees within an organization focused on personal perceptions of organizational culture.

[Learning Self-assessment for foundations](#)
Alliance Magazine

A short article that offers a few questions for foundations to consider that learning and sharing foundations might do.

[Learning Assessment Map](#)
(See appendix)
Lorraine S. Nemeth

Designed to identify patterns of everyday learning in an organization. It is focused mainly on individuals providing answers in a self-assessment survey.

The Readiness for Organizational Learning and Evaluation Instrument FSG	This instrument is designed to help an organization determine its level of readiness for implementing organizational learning and evaluation practices and processes that support it.
Evaluation capacity diagnostic tool Informing Change	Designed to help organizations assess their readiness to take on many types of evaluation activities. It captures information on organizational context and the evaluation experience of staff and can be used in various ways.
Utilization-Focused Evaluation Checklist Michael Quinn Patton	This checklist is for evaluators to assess and build evaluation readiness in organizations to do useful evaluation.
Resource guides	
Inspiring Impact: The Code of Good Impact Practice NCVO	The Code of Good Impact Practice provides broad, agreed guidelines for focusing on impact. It sets out a cycle of impact practice and a series of high level principles to follow. Each principle includes a brief description of how your impact practice would look if you were applying the principle, an explanation of why it is important and some ideas about how to implement it.
Learning Together: Actionable Approaches for Grantmakers Grantmakers for Effective Organizations (GEO)	In this publication, GEO offers actionable ideas and practices to help grantmakers make learning with others a priority. The publication includes stories about foundations that are learning together with a variety of partners, plus a discussion of the key questions that can help shape successful shared learning. It is based on research and interviews conducted from late 2013 to 2015, including extensive outreach to grantmakers, evaluation practitioners and others. The focus of GEO's inquiry: documenting the challenges facing grantmakers as they set out to learn with others, lifting up what it takes to do this work successfully and identifying grantmakers that show a commitment to learning together.

<p>Facilitating Intentional Group Learning: A Practical guide to 21 Learning Activities FSG</p>	<p>From quick 20-minute activities to multi-hour gatherings, this guide provides detailed instructions on how to conduct high-energy, inclusive, and productive experiences.</p>
<p>Collaborating, Learning, and Adapting (CLA) Toolkit USAID Learning Lab</p>	<p>A set of broad questions directly related to the work that an agency conducts that, when answered, enables the agency to work more effectively and efficiently, particularly pertaining to evaluation, evidence, and decision-making. Also prioritizes and establishes a plan to answer short- and long-term questions of the highest value across relevant program and policy areas.</p>
<p>A resource guide for Head Start programs: Moving beyond a culture of compliance to a culture of continuous improvement Office of Planning, Research and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services</p>	<p>Focused on Head Start agencies, this resource guide offers advice on how to better understand and work with data, create a culture of learning, and increase the ability to identify gaps and continuously improve programs.</p>
<p>Developing a Culture of Evaluation Community Literacy of Ontario</p>	<p>This project combines a variety of innovative consultation mechanisms and online training opportunities to help Ontario’s non-profit organizations learn about the value of creating a culture of evaluation and how to foster this in their own organizations.</p>
<p>Learning Together: Five Important Discussion Questions to Make Evaluation Useful Ontario Nonprofit Network</p>	<p>This guide is meant to help you articulate more clearly what you want to get out of an evaluation and what concerns you may have about the process. It is meant as a conversation starter and is a means to open up a dialogue with your stakeholders in a subject area that can be complex and difficult. That’s why we have developed this discussion guide. It provides tips about how to ask these questions in different contexts, the challenges that can come up, and what to do about them.</p>

[Collaborative Evaluation Approaches: A How-To Guide for Grantmakers](#)
Ontario Nonprofit Network

The purpose of this guide is to provide grantmakers who support the nonprofit sector with practical guidance about how to take a more collaborative approach to evaluation. When we use the term grantmaker, we are referring to non-governmental funders that provide financial support to nonprofit groups including United Ways, corporate, public, and private foundations.