



Strategies for Cultivating an Organizational Learning Culture

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High performance requires a significant culture shift within an organization. It is primarily about culture and people—not data and technology.

– Sotun Krouch, Roca Inc.

Increasing pressures for accountability and outcomes reporting coupled with increasing competition drive nonprofit organizations to implement continuous improvement strategies to meet internal and external needs. Learning is a key factor in the push for continuous quality improvement,¹ and nonprofits need data to make decisions, change their operations, and inform planning and program management activities. Nonprofit organizations accustomed to using data for accountability and reporting must think and manage differently to cultivate an organizational culture that values inquiry. Building and sustaining a learning culture, though beneficial, is seldom easy to achieve. This brief seeks to help nonprofit practitioners define a learning culture and the strategies needed to cultivate it.

BOX 1

Measure4Change

Measure4Change is a program of the World Bank Group and the Urban Institute to build performance measurement capacity among local nonprofits in the Washington, DC, metropolitan area. Nonprofits recognize the importance of measuring program effectiveness, but their abilities vary, and resources for improvement are scarce. Measure4Change aims to fill this long-standing gap between what nonprofits in the DC metropolitan area want and what they are able to do. The effort intends to deliver performance measurement training in a way that is practical and accessible for nonprofits and over an extended period of time to help it take hold. The ultimate goal of this effort is to help the DC region's nonprofits better understand how they are helping their constituencies and how they can do better. Measure4Change, sponsored by the World Bank Group, has three components: grant support and one-on-one technical assistance for grantees, a regional community of practice, and knowledge briefs.

What Is Organizational Culture?

Organizational culture refers to how things are done at an organization, as well as prevailing attitudes, patterns of accepted and expected behavior, and the habits that become part of the organization's principles and philosophy (Drennan 1992; Khademian 2002; Schein 2010). It is "the connective tissue that binds together the organization, including shared values and practices, behavior norms, and most important, the organization's orientation toward performance" (Morino 2011). An organization's culture often explains why certain systems, practices, and behaviors do or do not occur (Trice and Beyer 1993). Some organizational cultures are structured and controlled, governing employee behavior through rules and standard operating procedures. Other cultures are characterized by creativity and individuality, encouraging high levels of risk taking.

Organizations should consider culture when managing change or implementing new processes or practices. Organizational culture is multidimensional and can have subcultures beneath the dominant culture. For example, the accounting department may have a culture that is distinct from the culture in the marketing group. Further, an organization's subcultures may vary by group. For instance, the culture across younger employees may differ from the culture shared among more seasoned staff with longer tenure. Nonprofit organizations exhibit characteristics reflecting a mix of different cultures.

Organizational cultures also promote or inhibit certain behaviors and can channel behavior toward desired organizational practices and processes. A nonprofit with a family-like culture may stress the importance of adhering to the organization's traditions and norms and emphasize group activities and staff "doing things together." In contrast, a nonprofit with an entrepreneurial culture may be more likely to promote individuality and place a high regard on individual accomplishments. Culture reflects what an organization considers important and can help explain the attitudes and approaches that typify the way staff carry out their tasks.

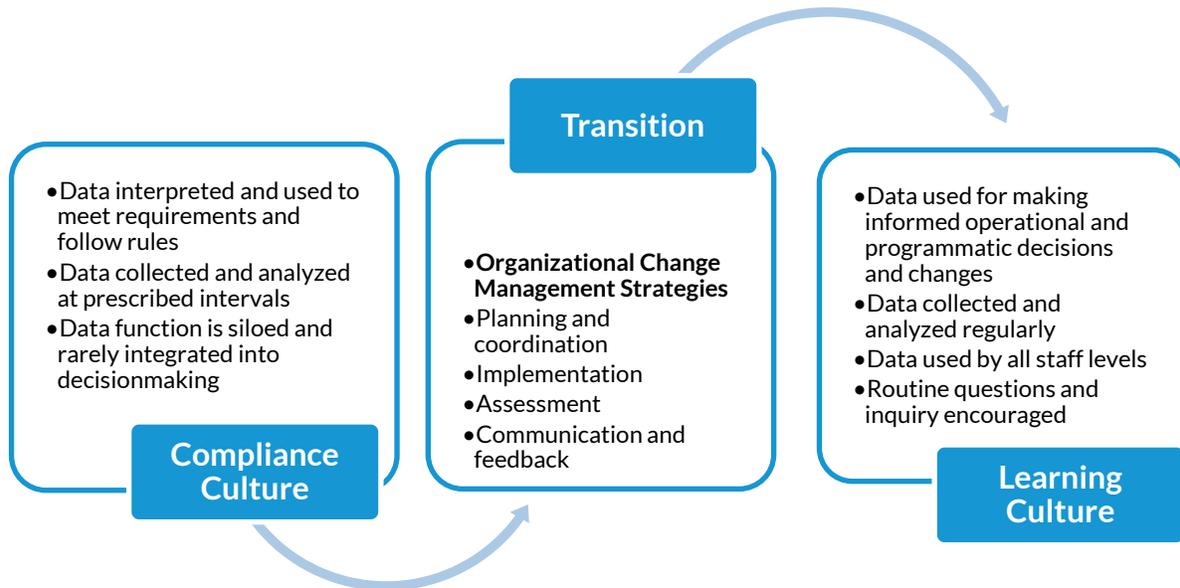
Despite attempts to define and characterize organizational culture, nailing down what this looks like for nonprofits in performance management and evaluation, or what needs changing, remains elusive for many. As part of the Measure4Change initiative, defining and cultivating a learning culture is top of mind for grantees and participants in the community of practice, based on polls to identify topics for large group meetings and as expressed in grantee applications. Even as nonprofits become more adept at defining barriers and challenges, they struggle to identify and implement strategies for changing behavioral norms about the role and purpose of data and decisionmaking.

Research shows that an organizational culture that values learning can be a key facilitator of data use for continuous quality improvement (Derrick-Mills et al. 2014). Organizations that foster a learning culture have staff who are interested in learning and apply what they have learned to improve their organizational, program, or individual performance. However, traditional compliance and accountability demands influence a nonprofit's organizational culture and how it functions. Nonprofits have adapted their internal environments in response to external pressures. Nonprofits with a compliance culture direct their attention and resources to ensuring compliance and tend to minimize using data to reflect and learn what the data mean and make informed decisions about program and operational improvements.

A learning culture moves beyond compliance by encouraging nonprofits to develop self-correcting mechanisms and internal practices that use data to examine failures and weaknesses to make programmatic and operational changes. Further, a learning culture minimizes barriers to data and knowledge and rewards and encourages data-driven practices, making learning and continuous improvement the rule, not the exception. Figure 1 captures distinctions between the two environments.

FIGURE 1

Cultivating a Learning Culture



What Does a Learning Culture Look Like?

“In my experience, people who improve, innovate, and adapt are curious souls and self-learners. An organization’s culture should encourage people to ask questions, seek advice, do research, improve what they do and how they do it, help each other, push each other’s thinking, probe, nudge, adapt, look at things from different vantage points. All of these behaviors lead to improvement and motivation for the organization and the individuals who are part of it.” – Mario Morino, Morino Institute

In February 2015, the Leap of Reason Ambassadors Community published the “Performance Imperative: A Framework for Social Sector Excellence” (Leap 2015).² The imperative offers a common definition of high performance, supported by seven pillars of highly effective organizations. The pillars range from leadership to management to evaluation for mission effectiveness. The fifth pillar, “A Culture that Values Learning,” includes eight principles that might characterize the performance culture in high-performing organizations (box 2).

Nonprofits that have been successful in building a culture that supports continuous learning and improvement often describe their efforts as a “journey, not a destination.” Furthermore, they acknowledge that the process can take many years, as mindsets and “old ways of doing business” do not change overnight. For many, the journey starts with strong leadership and a willingness to identify and devote the necessary resources. The remainder of this brief is devoted to specific strategies nonprofits can use to cultivate a learning culture.

BOX 2

An Organizational Culture that Values Learning

- The board, management, and staff understand the organization’s mission and desired results and review them periodically to ensure that they are still relevant.
- The board, management, and staff **continually seek to do even better for the people or causes they serve.**
- People in all parts of the organization have **high expectations of themselves** and of their peers.
- The board, management, and staff **take on the challenge of collecting and using information**, not because it’s a good marketing tool, and not because a funder said they have to. They believe it is integral to ensuring material, measurable, and sustainable good for the people or causes they serve.
- The board, management, and staff look for **opportunities to benchmark themselves against, and learn from, peer organizations** that are at the top of their field.
- Senior management leads by example and encourages people throughout the organization to **be curious, ask questions, and push each other’s thinking** by being appropriately and respectfully challenging. High-performance cultures are innovative cultures, mindful that every program and process eventually becomes dated, even obsolete.
- Senior management creates the conditions for staff members to **feel safe acknowledging when there are problems.** They use what others might deem “failures” as an opportunity for learning.
- Even the busiest leaders, managers, and staff members **carve out some time to step back, take stock, and reflect.**

Source: Leap (2015).

Strategies

Organizational change is easier said than done. An organization’s culture can present barriers when the organization tries to implement strategies and practices designed to encourage learning and enhance data use across staff. Nonprofit leaders and managers aiming to bridge the gap between staff and data use should identify the organizational factors and characteristics that can hinder or facilitate this effort. Once these factors have been identified, nonprofit leaders and managers will be better equipped to employ strategies that align with the nonprofit’s culture, which could be more effective and increase the likelihood of channeling staff behaviors toward desired data-use practices.

Cultivating a learning culture may be a fundamental change for an organization, requiring a combination of strategies to encourage and enhance data use across all staff levels. Because organizational cultures vary and are multidimensional, one strategy can yield different results as department cultures may respond differently. Nonprofit leaders and managers may have to adjust their approach when dealing with different groups within the organization. Whether the goal is to focus internally to improve operations or externally to enhance service delivery and programs, organizations must foster environments where data are viewed as a vehicle for ongoing learning, and staff have the tools and space to apply and share what they learn. Below are key strategies nonprofit leaders and managers can apply to help build capacity, embed data use into organizational routines and processes, and incorporate stakeholder feedback about programs and services.

Strengthening Organizational and Staff Capacity

Despite increased attention to the benefits of data use in organizations, data do not appear to be used widely by nonprofit staff to manage performance and make program and operational improvements (Moore 2000; Thompson 2014). Nonprofits suggest that the marginal use of data for data-driven decisionmaking and learning in nonprofit organizations can be difficult because of organizational and staff constraints. Consistent with the sector, the nonprofits involved in Measure4Change describe nominal data use to improve programs and operations at their organizations. In particular, the participating nonprofits highlight such challenges as limited access to quality data, staff buy-in and interest, capacity to work with data beyond what is required for reporting to funders, understanding data's value, and infrastructure and information systems in place to facilitate data use. To address these deficiencies, nonprofit leaders can use the following strategies to help bridge the gap between staff and data use.

CULTIVATING AN ORGANIZATIONAL CULTURE OF LEARNING REQUIRES COMMITTING RESOURCES

A workplace that values organizational learning should provide access to the skills, information, and technology needed for staff to engage in a learning culture. This access requires **investing resources to develop an organizational learning infrastructure, including staff capacity**. The learning infrastructure encompasses the day-to-day systems, processes, and assets that contribute to an organization's capacity to generate, collect, interpret, and disseminate data. Although many resources are important to building the infrastructure, investing in the requisite equipment and technology and building staff knowledge and skills are crucial to creating and sustaining organizational cultures that regularly use data to learn and make informed decisions (Derrick-Mills et al. 2014; Hatry et al. 2005; Poister 2010).

In some cases, limited staff capacity and analytic data skills are barriers for nonprofits. In the Nonprofit Finance Fund's 2015 State of the Nonprofit Sector Survey, 36 percent of nonprofits indicated that they do not have staff to collect and analyze outputs and outcomes data (Nonprofit Finance Fund 2015). Nonprofits also need to invest in staff training and development to acquire basic skills for collecting, analyzing, and using data.

The nonprofits participating in Measure4Change refer to resource constraints (e.g., data system limitations and lack of funding to support training opportunities, materials, and tools) that pose challenges to their efforts. The participating nonprofits that provide training often mention that technical abilities vary greatly among staff at their organizations, which can make targeting training materials to staff with a wide range of skill levels challenging and costly. In some cases, staff may require assistance beyond formal workshops and webinars.

Cost-effective ways to design and implement professional development efforts are available for nonprofits challenged to find resources for professional development. Organizations should consider **providing a combination of group training and individual technical assistance to staff**. They should also develop or hire staff to provide ongoing professional support or coaching (Kabacene et al. 2010; Means, Padilla, and Gallagher 2010). These data coaches can help staff develop the skills to use data effectively and incorporate data use into their regular job responsibilities (Derrick-Mills et al. 2014).

As new staff are hired, nonprofit organizations can use onboarding or orientation programs to demonstrate the organization's commitment to learning and help employees understand how using data can benefit their new roles. Including expectations about routine review and data use in organizational mission or values statements and as part of employee job descriptions are effective means of signaling the importance and value of this work. Modifying new employee orientation processes presents an opportunity to move toward organizational learning by addressing the organization's culture at the entry point. Further, organizations might consider **assigning a "data mentor"** to new employees (and current employees who need to strengthen their analytical skills) to coach staff and positively reinforce data utilization practices. Promoting a learning culture through mentoring can ensure new employees feel empowered to learn and increase engagement.

Embedding Learning into Organizational Routines and Practices

Embedding data use and learning into an organization's culture may require change (Shackelford et al. 2007). If a new organizational culture departs from an earlier culture, the most senior staff in should initiate and support this change. Leaders and managers can help establish a learning culture by finding ways to embed data use into regular organizational routines and behaviors. Although the amount of time leaders and managers commit to using data is important, research suggests that it is how leaders engage with staff that makes the difference. Hatry and Davies (2011) conducted interviews with federal employees and found that leaders of successful data-use initiatives were characterized as "hands-on, active, and constantly pushing." The ultimate goal, however, is that all members of the organization understand and feel ownership regarding their contribution and commitment to ongoing data use for learning and inquiry.

NONPROFIT LEADERS AND MANAGERS CAN SIGNAL THE IMPORTANCE OF LEARNING

Cultivating a learning culture requires leaders to help transform attitudes and actions to support information sharing, problem identification and resolution, and innovation. If **leaders signal willingness to use data to make decisions and changes**, support for these practices may filter through the organization, and employees may be more likely to embrace and model the same behaviors. Cultivating

a learning culture requires leadership behaviors that show data use is reinforced, encouraged, and expected. Leaders can bring about strategic changes in organizations by creating safe, trusting environments that foster learning, candid conversations, creativity, and innovation. Staff often look to their organization's leadership to model attitudes and behaviors. Leadership modeling may be a more straightforward approach to convincing staff to use data if they observe the leadership using data regularly.

The nonprofits in Measure4Change express the importance of leadership buy-in and commitment to using data to make informed decisions about programs and operations. The participating nonprofits that have leaders who are role models and lead data discussions seem to benefit from leadership conveying the value of using data to staff. Yet, the participating nonprofits agree that changing prevailing mind-sets and getting *all* employees, including senior leadership, to embrace continuous data use can be a challenge. Leadership at the nonprofits participating in Measure4Change place value on data and continuous improvement by designating a data management role within the organization, yet few participants think this is enough to help spread data responsibilities throughout the organization and incorporate data use as a part of daily work. Leaders must “walk the talk” and model the behaviors and practices they want to implement across the organization.

Below are two strategies to help nonprofit leadership signal the importance of organizational learning to get staff to be more curious about data and channel the behaviors toward desired data-use practices. The elements of an organization's culture can influence management philosophy and employee behaviors. Nonprofit leaders and managers should think about the elements of their organization's culture that need to be adjusted or abandoned to move beyond conventional ways of managing.

First, be transparent and share data and results directly with staff. Disclosing data and results in user-friendly formats can signal the importance of learning and build support and trust. Sharing this information can let staff know how leaders are interpreting, responding to, and acting on data. It also can be a way for leaders to model the behaviors and practices they want to implement across the organization. Open and frequent communication can enhance staff learning and understanding of what the data mean and keep staff informed of issues facing the organization.

Second, use several formats to demonstrate how leaders and managers are making data-driven decisions. Leaders can help endorse and cultivate a learning culture by using various communication formats (e.g., e-mail, newsletters, staff meetings, one-on-one conversations) to share examples of data-driven decisions at the organizational and individual levels. When the individuals and groups that are asked to change the way they do things or implement new practices are informed about the ways leaders are making data-driven decisions and changes, they may be more willing to accept and engage in similar behaviors.

LEADERS MUST RECOGNIZE THAT STAFF NEED TIME TO COLLECT, ENTER, EXAMINE, AND USE DATA

Staff often lack the time to incorporate data use into their busy and overburdened schedules (Carman and Millesen 2005). Making that time can be challenging in underresourced nonprofits. Idealware's (2012) survey of nonprofit organizations showed that 61 percent of organizations lacking resources considered lack of time the primary challenge for collecting and using data. Similarly, according to the Means, Padilla and Gallagher (2010) nationally representative study of school districts, the greatest logistical barrier to implementing data-driven decisionmaking is the time needed to engage in the effort: 92 percent of school districts cited time as a barrier; 51 percent identified it as a major barrier.

The nonprofits involved in Measure4 Change grapple with time issues. While the time needed depends on many factors, including staff analytical capacity and the capability of current data systems, the participating nonprofits struggle with how to get staff to reserve time during their busy days to enter and reflect on data. Despite recognizing the value of using data, the participating nonprofits shared that staff often wear multiple hats and work long hours. Asking staff to use data would be an added burden. Moreover, staff may lack familiarity or comfort with data use, which can lead to frustration if data requests are seen as cumbersome and disconnected from day-to-day work routines. The time issue can be further compounded by an organizational culture that is more focused on using data for external reporting and not for internal improvement.

Leaders and managers expecting staff to integrate data use into their regular routines should have a **plan for use and time allotted to engage in these activities**. While data collection may occur within service delivery, time must be spent away from service delivery to analyze and interpret the data and think about solutions (Bernhardt 2009).

To encourage data use and learning, organizations can adopt embedded learning strategies. *Embedded learning* refers to training and learning that takes place during the workday and is embedded into staff daily routines and activities (Wood and McQuarrie 1999). Embedded learning approaches allow staff to safely experiment and use data to work through solutions to authentic and immediate work issues as part of a cycle of continuous improvement (Croft et al. 2010; Hawley and Valli 1999). Below are three strategies that can help nonprofit organizations address the time issues that impede efforts to cultivate a learning culture.

First, incorporate data reports and discussions into regular staff meetings. Organizations should consider a tiered approach for introducing data by using a small number of graphs or charts that are simple and easy to understand. At first, leaders and managers should consider reviewing the same types of data at each staff meeting to help staff get comfortable and familiar with the process, later adding information or engaging in more in-depth discussions where additional attention is needed. The data presented at staff meetings can focus on snapshots of indicators or trends that may need to be monitored fairly frequently.

To facilitate this process, nonprofits should consider developing dashboards that can summarize key data points in a single graphic. For example, the "Assets and Opportunity Scorecard" illustrates

several reporting options and data visualizations on indicators related to assets and opportunity, including education.³ Additional information on scorecards, dashboards, and data visualizations can be found in Geier and Smith (2012), especially in chapter 3, which includes an overview of data displays, attributes of a good data display, and a short section on dashboards.

Lastly, to increase engagement and buy-in, staff should provide input on what kinds of reports are most useful to them and at what intervals. Providing reports based on data that staff collect will make these activities more meaningful to staff and engage them in thoughtful inquiry about the meaning behind the data (Derrick-Mills et al. 2014). Further, having different staff present or report on data during staff meetings can also create a greater sense of connection and ownership of results.

Second, institute data review meetings. Scheduling time to review relevant program data can help cultivate a learning culture. These sessions can occur one on one or in a group setting. Having these discussions in a group can maximize the opportunity to hear different perspectives on the same information and develop a more vibrant peer-to-peer exchange (Derrick-Mills et al. 2015). Having rotating leaders for these sessions can facilitate staff engagement. Because it is important to be candid and open about what the data say and what individuals or groups can do to troubleshoot or solve problems, each session should provide a safe and trusting environment conducive to learning and exploring data.

The CitiStat model has taken root in many cities and state governments. CitiStat is a data-informed model of government that emphasizes continuous review of data across government agencies. Typically, department leaders are convened every two weeks by the mayor or deputy mayor to review data that have been submitted before the meeting. Data are reviewed at each meeting, and agency heads are expected to identify solutions and report on progress implementing these solutions and any change in the data from the previous session. With some adaptation, this model can be incorporated in nonprofit organizations and provide time and space for staff to use data to flag issues and make programmatic and operational decisions. Living Cities' blog on using data for collective impact includes additional resources about data review meetings and related resources.⁴

Third, incorporate processes to recognize and reward learning and data-use behaviors. Conditions that support learning and data use to solve problems include encouragement and positive reinforcement (Gagne and Medsker 1996). To learn, employees cannot fear being derided or penalized when they ask questions, own up to mistakes, flag opportunities for improvement, or make suggestions. Staff should feel comfortable discussing whatever the data might disclose about their performance or program operations and outcomes without fear of reprisal (Derrick-Mills et al. 2014).

Recognizing and rewarding employees that engage in learning practices can help nonprofit organizations reinforce a learning culture and can motivate staff to use data in their daily routines. About half of the nonprofits surveyed in a 2010 Bridgespan study reported that they do not evaluate or reward some of the behaviors that support learning (Milway and Saxton 2011). Moreover, interviews conducted for this study found that measuring and encouraging learning behavior was where nonprofits struggled the most.⁵

Organizations can incorporate recognition and rewards in annual performance appraisals. A formal employee-recognition strategy builds organizational learning responsibilities into job descriptions and creates the metrics against which employees are measured. The Council on Foundations incorporates knowledge as part of the job descriptions for their member-facing staff and uses data tracking “to inform performance reviews, measure and evaluate staff on how well they capture and pass on learning to colleagues, enable richer services to members, and collaborate across departments to pass on best practices.”⁶ Given the financial constraints of many nonprofits, nonmonetary rewards can also increase staff engagement and intrinsically motivate certain behaviors (Morrell 2011). Such practices range from recognizing and thanking employees individually to publicly recognizing the positive impact on operations that resulted.

Engaging Other Stakeholders

Organizational learning can be internally focused on improving operations or externally oriented to gain perspectives on programmatic activities and service delivery challenges. Often, these external perspectives provide valuable feedback and insights to program staff, reflecting an individual’s experience or clarifying possible misconceptions or preferences for ways to strengthen service delivery. Several Measure4Change participants obtain stakeholder feedback, but gathering quality data that can enhance data-driven decisions and program changes is difficult. Participating nonprofits have challenges developing valid appropriate assessment tools for their various stakeholder groups, ensuring reports contain robust data that are easily understood by a range of stakeholders, investing adequate time and resources to inform and educate stakeholders, and integrating and streamlining stakeholder feedback in ways that improve internal operational and programmatic management processes.

Further, organizations need to define key stakeholders, including clients and families served and the broader community within which the nonprofit operates (e.g., other nonprofits, board members, and current or prospective funders or donors). Although the ways nonprofits engage with stakeholders may draw upon many of the techniques used to engage with staff, two newer strategies for engaging with other stakeholders are constituent feedback and data walks.

CONSTITUENT FEEDBACK

In principle, constituent or beneficiary feedback is about listening to the intended beneficiaries of nonprofit programs, the people they seek to help.⁷ Obtaining systematic feedback can be helpful during program design, implementation, or after a program concludes.⁸ Constituent feedback goes beyond asking about program satisfaction. The goal is to understand the point of view, perspective, and experiences of the client or constituent and to use this information to inform service delivery and attend to personal goals and outcomes articulated by the client, not just the program provider. Keystone Accountability and Feedback Labs are two of the most well-known entities promoting “constituent voice.”

DATA WALKS

Data walks are an effective means to share data with local communities and to facilitate shared learning. During data walks, nonprofit staff or researchers share data with residents, community members, or program participants. The data are reviewed in small groups, and participants share opinions and perspectives about the data's meaning or implications. According to Murray, Falkenburger, and Sexana (2015), data walks have the following key objectives:

- Share key data and findings with community residents and program participants
- Ensure a more robust analysis and understanding of the data
- Help inform better programming and policies to address the strengths and needs of a particular community or population
- Inspire individual and collective action among community agents

Additional information on data walks and communicating data with external audiences can be found in an earlier Measure4Change brief (Baum 2015).⁹

Closing Thoughts

Cultivating a culture that values learning is hard work. For many organizations, it will require a significant change in mind-set and approach, including the need to challenge basic assumptions and undo past practice and viewpoints about the purpose and value of data. These changes will take time. Organizational cultures are complex, dynamic, and unique to each nonprofit; there is no one-size-fits-all approach to realizing change. But incremental changes will be rewarded with a strengthened organization able to achieve higher performance levels for the people and communities they serve.

Notes

1. *Continuous quality improvement* and *learning culture* describe the organizational processes and functions for using data to manage performance and improve effectiveness.
2. The Leap of Reason Ambassadors Community is a private community of nonprofit thought leaders, leader practitioners, progressive funders, policymakers, and instigators who believe “performance matters.” See <http://leapambassadors.org/>.
3. “Assets and Opportunity Scorecard,” Corporation for Enterprise Development, accessed November 8, 2016, <http://assetsandopportunity.org/scorecard/>.
4. Jeff Raderstrong, “What Does It Take to Use Data to Change Behavior in Collective Impact?” *Living Cities*, May 4, 2016, <https://www.livingcities.org/blog/1065-what-does-it-take-to-use-data-to-change-behavior-in-collective-impact>.
5. Katie Smith Milway and Amy Saxton, “The Challenge of Organizational Learning,” *Stanford Social Innovation Review*, Summer 2011, 44–49, https://ssir.org/articles/entry/the_challenge_of_organizational_learning.
6. Ibid.
7. Mary Winkler, “How to Build Great Organizations for Greater Societal Impact,” npENGAGE, June 30, 2016, <http://npengage.com/nonprofit-management/how-to-build-great-organizations-for-greater-societal-impact/>.
8. Fay Twersky, Phil Buchanan, and Valerie Threlfall, “Listening to Those Who Matter Most, the Beneficiaries,” *Stanford Social Innovation Review*, Spring 2013, https://ssir.org/articles/entry/listening_to_those_who_matter_most_the_beneficiaries.
9. See also Elsa Falkenburger, “Data Walks: Getting data into the community’s hands,” *Urban Wire* (blog), Urban Institute, November 8, 2016, <http://www.urban.org/urban-wire/data-walks-getting-data-communitys-hands>; and Murray, Falkenburger, and Saxena (2015).

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