Achieving Greater Learning Impact By Starting with Learning

How-To Training Guide

About

This how-to training guide 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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Purpose

The purpose of this guide is to provide tips and strategies to grantmakers to help them make learning-focused decisions at the grant application stage.

It is designed to help identify areas where learning can be be brought forward early in the relationship.

It can be used to help grantmaker staff to engage in productive conversations with other staff, grant applicants, and other stakeholders.

It should be seen as a training document in conjunction with the other tools provided by Taylor Newberry Consulting.
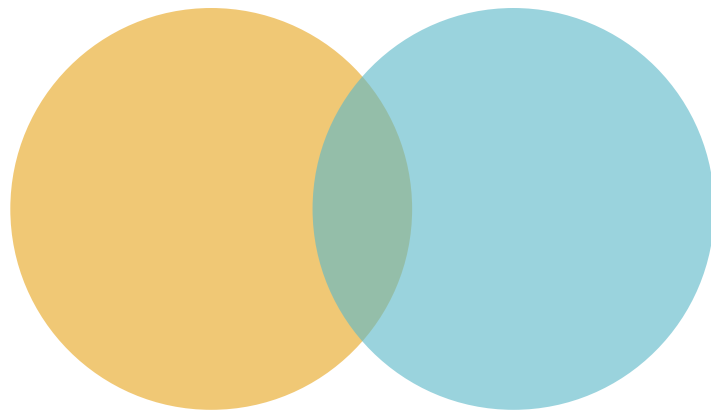
Introduction

Defining a Learning Culture

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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.

Center for Nonprofit Excellence. "What's a Learning Culture & Why Does it Matter to Your Nonprofit?" Center for Nonprofit Excellence. May 11, 2016.

Why is Organizational Learning Important?

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.

Building a strong culture of learning takes skill, effort, and time. While grantmakers and other nonprofits have worked hard in recent years to build their capacity to evaluate outcomes, less emphasis has been placed on building learning capacity. While many grantmakers recognize that the measurement of outcomes requires specialized expertise and dedicated resources, they don't always acknowledge that the same is true for the work of learning from evaluation.
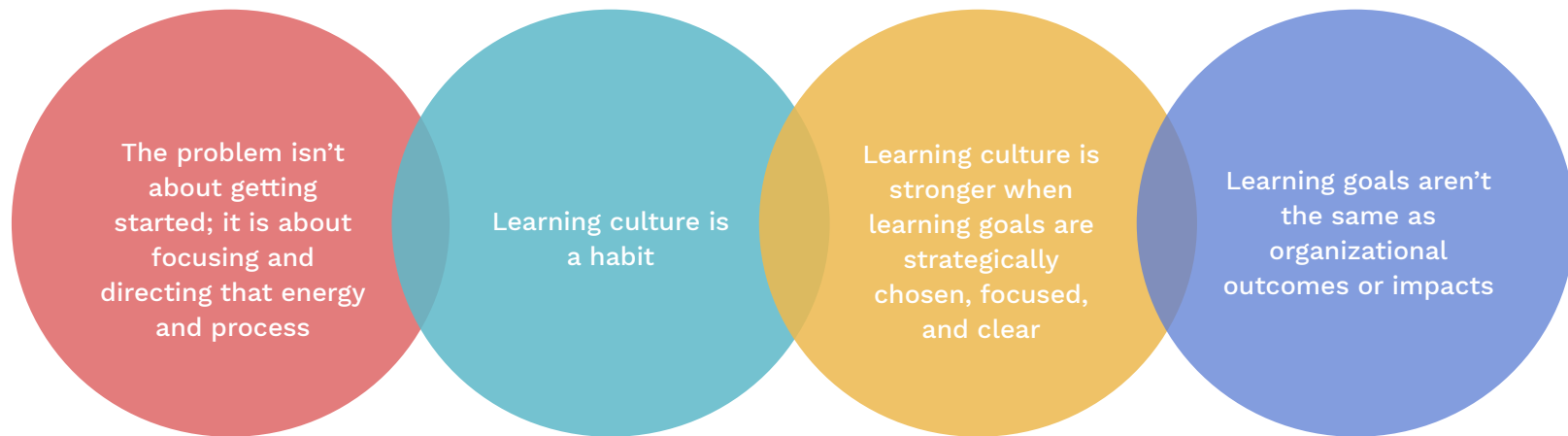
Organizational Learning

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A shared and learned world of experiences, meanings, values, and understandings that inform people and that are expressed, reproduced, and communicated partly in symbolic form," and also partly in functional and practical actions.

Alvesson 2010, 5

Alvesson, Mats. "Organizational Culture: Meaning, Discourse, and Identity." In Neal M. Ashkanasy, Celeste P.M. Wilderom & Mark F. Peterson (Eds.), The Handbook of Organizational Culture and Climate. Sage Publications. 2010.

Some key insights about learning culture

The problem isn't about getting started; it is about focusing and directing that energy and process

Learning culture is a habit

Learning culture is stronger when learning goals are strategically chosen, focused, and clear

Learning goals aren't the same as organizational outcomes or impacts

Some (more) key insights about learning culture

Organizational culture, like any form of culture, is dynamic, evolving, and co-constructed.

Every organization is different. Healthy learning cultures don't all look the same.

Organizational learning is different from individual learning.

Building a learning culture takes time, energy, and a specific set of skills.

In strong learning cultures...

Deep questions get asked.

Organizations ask questions about their values and assumptions, not just questions about program tactics.

Learning is inclusive and engages partners.

Organizations engage their external partners in the learning process.

The organization is ready to act on what it learns.

Organizations are prepared for the implications of what they learn. They are willing and able to alter their practices.

Leadership drives organizational learning.

Executive directors, CEOs, presidents, and senior managers play an important role in leading by example and in creating space and encouraging learning in others.

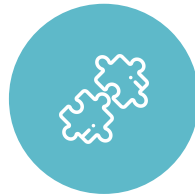# Building a Learning Culture in Your Own Organization

Building a culture of learning takes time and skill. It may require different skills than building evaluation capacity. It may, for example, require:

Facilitation and listening skills

Skills around sharing and learning from failure

Skills around combining information of various kinds in order to identify new insights

Building a culture of learning also requires time and resources

The grant application stage and developing a learning relationship

Why is the grant application stage important for learning?

Talking with grantees and applicants about 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.

Why is the grant application stage important for learning?

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.

Traditional grant application processes

Traditional grant application processes don't tend to foreground learning or evaluation goals. Measurement is often discussed, but questions tend to focus on accountability and risk management. There is often talk of ensuring program sustainability, clarifying how money will be spent, and what will be measured.
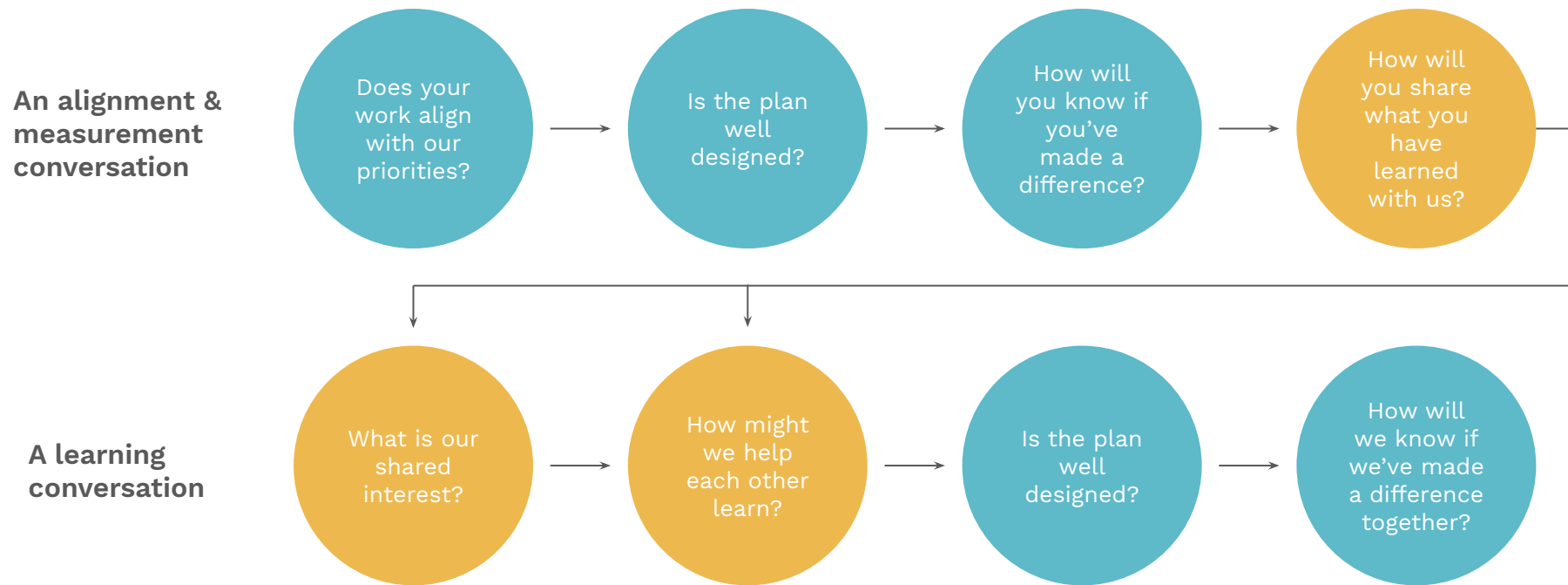
While these may be important topics to discuss, they are not questions that set the stage for learning. This in turn helps to shape the narrative and signals to grantees that learning is low on the priority list — if on it at all.

A learning approach to the grant application process

An application process that focuses on shared learning goals, and takes steps to build understanding and trust, is much more likely to lead to open conversations that help determine the work that needs to get done and the best way forward.
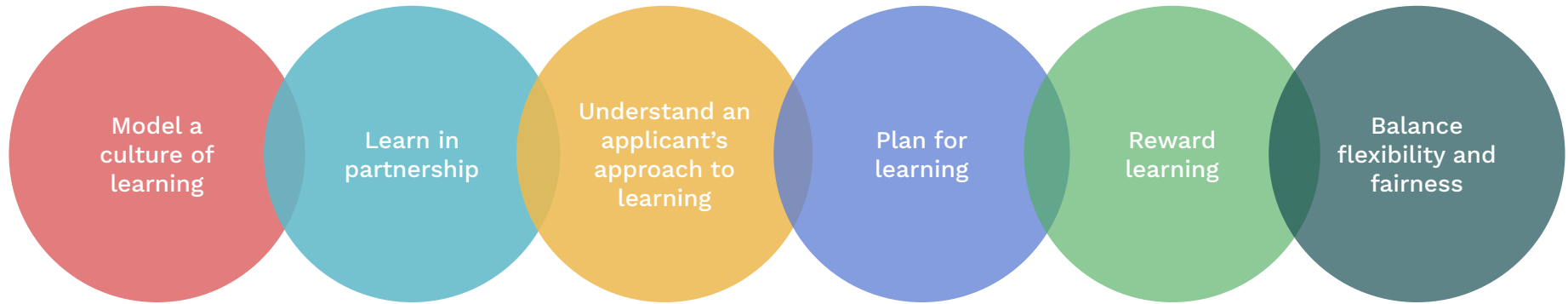
A learning focus requires rethinking how you work, **move learning to the beginning of the conversation**

An alignment & measurement conversation

- Does your work align with our priorities?
- Is the plan well designed?
- How will you know if you've made a difference?
- How will you share what you have learned with us?

A learning conversation

- What is our shared interest?
- How might we help each other learn?
- Is the plan well designed?
- How will we know if we've made a difference together?

6 Principles to Guide the Development of a Learning Relationship for Grantmakers

6 principles to guide the development of a learning culture

Model a culture of learning

Learn in partnership

Understand an applicant's approach to learning

Plan for learning

Reward learning

Balance flexibility and fairness

1. Model a culture of learning

As a grantmaker, demonstrate your commitment to learning from your relationship with applicants by sharing information on your own learning culture.

How to: What is your working culture?

Exercise: Reflect on your own culture of learning and share what you learn.

1
Take the **Organizational Learning Self-Assessment Tool**.

2
Walk through the self-assessment and discuss findings with your team.

3
Discussion question: How do we model our learning culture to applicants?

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How to: Model a Learning Culture

Use language that models a commitment to learning. E.g., "that's something we are still not sure about." "That's an area where we are currently working to improve our practise." "These are a few of the assumptions we are making."

Share past evaluation findings in a way that foregrounds less positive findings and unexpected themes.

Share examples of how your current position is informed by past learning. Share how you make decisions using evaluation and other kinds of information.

2. Learn in partnership

Learning requires reaching outside one's comfort zone and listening to others. One of the best ways to help another organization build its capacity to learn is to enter into a relationship with them that is designed to maximize shared learning.

What learning in partnership means

Setting up a relationship with another organization that is focused on learning can involve changing the content of your communication (from indicators and metrics to learning goals and relationships for example). It can also change the format (e.g., incorporating more interaction and face-to-face time and less gathering of plans through forms).

Learning can happen at different times and this may only be uncovered through continued interaction. Some grantmakers invite applicants to define their own learning goals and then share them for discussion.

Learning questions vs. measurement questions in a grant application

LEARNING-ORIENTED QUESTIONS	OUTCOMES & MEASUREMENT-ORIENTED QUESTIONS
Why are you proposing this project? What are some of your organization's learning goals?	What are your outcome objectives?
Why do you see us as a good partner? How can we help each other learn?	How do you align with our investment priorities?
What do you hope to learn? How will you make use of evidence when making decisions?	What are your evaluation questions?
What do you expect to be the challenges? How will you know if you are on track? What would count as success?	What are your benchmarks or targets?
How often do staff meet to talk or reflect on project/program progress? In what ways does your organization document and share information?	What indicators and methods will you use?

How-to: Starting a Conversation About Learning

ASK THESE QUESTIONS

How can we help each other learn?

Do you need help from others to accomplish your goals? Why?

Where is our shared interest? Does it have to do with the outcomes we want to achieve? The populations we serve? The approaches we use? Our location?

What does accountability mean for each of us?

How to acknowledge power dynamics

There can be power dynamics when one organization has the power to determine whether another organization receives funding. At the grant application stage, the difference in knowledge between the grant applicant and grantmaker and how each interprets what is important can lead to situations where the grant applicant answers questions based on what they think the grantmaker is *looking to hear* rather than *what is best for the program*. The grantmaker may also interpret these answers as gospel and set unrealistic expectations that start the relationship off on a misguided start.
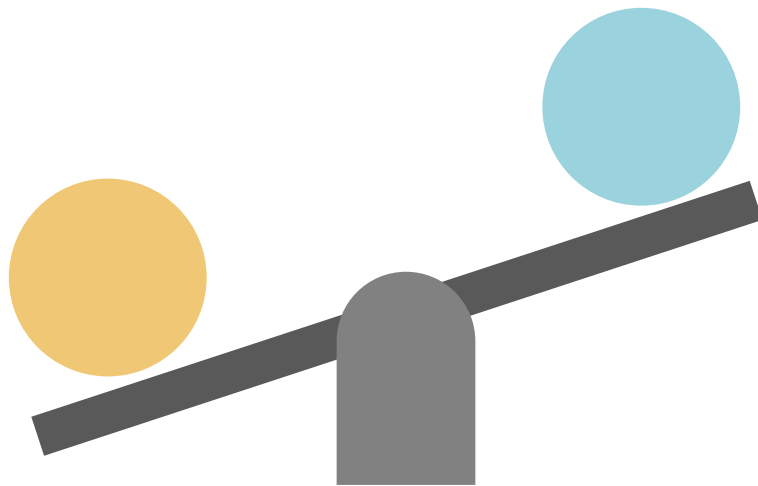
3. Understand an applicant's approach to learning

While one organization cannot force another to develop a culture of learning, it can seek to understand and respect another organization's culture.

What understanding an organization's approach to learning means

Organizations learn in a variety of ways. Their capacity to learn may be inhibited by a range of external factors and their approach may change over time as they grow. Some organizations may be better able to devote time to reflection at certain times of year — once the school year is over, for example. Others may learn in a more ongoing way. It can be difficult to predict when an opportunity for learning will occur or how long it will take.

When seeking to develop share learning relationships, it is important to understand these differences. There may be implications for who should be involved in evaluation work, when future meetings should take place, or how ready a grantee will be to share insights when the funder's reporting deadline arrives.

How to: Remember that not all working cultures are the same

When planning for learning, remember that some organizations are better equipped to communicate with you about their learning goals. Smaller organizations without full-time grant writing staff, for example, may not be as skilled in using the language you are used to. Below are some tips to help:

Review the language you are sharing publicly about your processes and ensuring it is clear.

Get external feedback on the applicant or application from members of the community.

Arrange for a site visit or meeting to better understand the applicant and the work they do if writing is not their strong suit.

How do you take organizational culture into account when interacting with an applicant?

On the next slide are descriptions of two organizations that run programs with very similar activities and intended outcomes. Both of these organizations have strong learning cultures, but they are profoundly different.

How would you adapt your approach to working with each of these organizations even though the basic facts of the programs to be potentially funded are very similar?

Awesome Organization

Hates meetings. Prefers short one-on-one "check-ins" on an ad hoc basis.

Staff regularly bump into each other as well as clients all day long.

Identity is built around a specific set of values (e.g., walking with our clients).

Loose, flexible approach to programming.

Stable & charismatic team of leaders.

Super Duper Organization

Meets regularly & uses meeting time really well.

Staff work in several different offices. Rarely meet face-to-face.

Identity is focused on a specific set of services.

More traditional hierarchy of roles, but is very clear & transparent about how it functions.

Recently went through a difficult, but positive leadership transition.

AWESOME ORGANIZATION	SUPER DUPER ORGANIZATION
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Identity is built around a specific set of values (e.g., walking with our clients)	Identity is focused on a specific set of services
Loose, flexible approach to programming	More traditional hierarchy of roles, but is very clear & transparent about how it functions
Stable & charismatic team of leaders	Recently went through a difficult, but positive leadership transition

Both the Awesome and Super Duper Organizations do good work. Yet, they operate very differently. How would approach working with each? What types of supports might you provide? What questions would you want to ask to learn more?

4. Plan for learning

Learning happens when there is intentionality: clear, shared, and focused learning goals lead to more honest conversations and sensitize us to watch for the unexpected.

What are learning goals?

Grantmakers can help influence what nonprofits prioritize and can also make it easier and less time consuming for nonprofits to understand their priorities by clearly articulating and publicly sharing its learning goals.

This can be done and reinforced through your website, hosting information sessions, during site visits, and in one-on-one conversations.

What are learning goals?

Specific statements that reflect overall learning goals. These are often closely related to the mission of the organization. They may be externally or internally focused (e.g., understanding how a program contributes to fighting poverty vs. establishing an advisory committee to aid in the learning process).

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*.

While learning goals sometimes look similar to formative or process evaluation questions, they have a different purpose. While formative evaluation questions are used to focus data gathering work, learning goals are used to design organizational structures and processes that promote ongoing learning.

How to: Define your learning goals

- Why did we decide on these goals and not others?

- Where are our learning goals evolving?

- Where are we willing or hoping to learn from applicants about what we need to be learning?

- What do we hope to be able to do next? What do we need to know to be able to do it?

- Once we complete this group of grants, or once we review the reports from this year, what do we plan to do with that new knowledge? How is that different from what we can do now?

5. Reward learning

Make it clear from the beginning that a commitment to learning will be valued in the decision-making process and in managing the grant on an ongoing basis. This can also help to reduce the reporting burden on potential and future grantees and encourage discussion of what really matters.

What rewarding learning means

Grantmakers sometimes send the message (directly or indirectly) that they will reward grantees that achieve measurable change. This can lead grantees to suppress evidence that suggests they have not achieved their intended outcomes even though this kind of evidence may be the source of the richest learnings about unexpected obstacles, innovative approaches, or what to do differently next time.

How to: Reward learning

- Be clear that you are interested in all information that addresses learning goals.

- Explain how you will use this information in future decision-making.

- Ensure that there are multiple channels that grantees can use to share what they are learning, including (for example) informal check-ins, meetings with other grantees, and more formal annual reports.

- Work with grantees to anticipate potential.

- Identify ways that you can provide additional support for learning such as offering strategic advice, facilitating connections to a broader network, or providing technical assistance to help applicants achieve their learning goals.

6. Balance flexibility and fairness

The process of interaction and reporting will need to be adjustable to make sense for the conditions and context that each grant recipient is operating under. Cultivating a learning culture necessarily involves surrendering some control over the process and acknowledging mistakes. It is important that all stakeholders are comfortable with this shift and that they are supported to manage it.

What balancing flexibility and fairness means

Spending time reviewing how information about learning goals and plans will be documented and used in decision-making.

Consulting with other stakeholder groups (such as donors or other grantmakers) about their learning goals, in order to ensure that they are considered alongside the input of applicants when making decisions.

Acknowledging that learning is an ongoing process and that it may not be possible to be as focused and intentional as one may wish at the application stage.

Ingredients of alignment

Here are five statements to keep in mind when considering whether you and your partners are moving toward the same learning goals.

1. A shared belief in a common learning goal or learning goals.

2. A willingness to openly engage and discuss with one another on the processes and details of the work to be completed.

3. A desire to share lessons learned with one another as the program or project progresses.

4. An understanding that learning may require investment

5. A history of curiosity.

How-To: Questions to help determine alignment

Here are a few questions to ask to help determine alignment:

1. What do we both hope to learn from this work?

2. What can we learn from each other and what feedback might help make this work better?

3. What do we hope to share and how will we share it?

4. What do we need to make this work a success?

5. What makes us curious about this work and how have we taken steps to learn more along the way?

Wrapping Up

6 Principles to guide the development of a learning relationship

Model a culture of learning

Learn in partnership

Understand an applicant's approach to learning

Plan for learning

Reward learning

Balance flexibility and fairness

Question Bank

This [Question Bank](#) is designed for grantmaker staff to adapt with the ability to pick and choose the questions that are most appropriate for their contexts. The questions are organized into three categories:

Organizational Habits & Behaviours

Leadership & Strategic Direction

Organizational Capacity & Resources

This tool can help funders identify the questions or categories that would help them to better understand an applicants or grantees learning culture and allow for further conversation about each other's learning priorities.

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.**