What is a learning organisation?

A learning organisation is one where staff at all levels can access and use insights to inform their decisions and improve their work. These decisions could be around strategy and planning, programme design, delivery or quality, fundraising and building partnerships, among other things. Therefore, the insights we use could be based on evidence from the organisation’s monitoring and evaluation efforts, from staff and volunteer experience, or from others in the sector—eg, government administrative data, policy research, systematic reviews or evidence gap maps. There are different reasons why organisations don’t learn. The sketch note on page 2 highlights a few key factors.

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1 More information on what a learning culture looks like: https://www.inspiringimpact.org/learn-to-measure/review/improve-your-work/
Figure 1: Sketch note

Why develop a learning organisation?

‘How we can use data more effectively to inform decision making and improve our work is an important yet neglected question.’

James Noble, NPC

As a sector, we are tackling difficult issues with limited resources. Therefore, it is important to build a culture where teams understand what works, where, for whom and why. It is even more important for us to use this learning to improve the impact of our work on people’s lives. We have come a long way in measuring the results of interventions in the charity sector, but we often miss opportunities to use this evidence to learn and to inform our decisions. Other practical factors influence decision making: the availability of funds and partners, opportunities at the time, government priorities, internal capacity etc. However, there are clear benefits of learning from evidence and using it better.

As a sector we can improve the impact on people’s lives if we use evidence to inform our work by:

- Making **better decisions by learning** which charitable interventions are likely to be most effective;
- Be **better equipped** to deal with the complexity of the social issues you are trying to influence;
- Improve day-to-day practice, being **more efficient**, and getting the most from your resources;
- Ensure you learn from experiences and **improve**;
- Be **more accountable, credible and open** about what you do, to those you work with and to those that support your work.

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Getting started: How to develop a learning organisation

‘Spending more time on technical issues is not effective. We need to spend more time on understanding the people that use the data.’

Rachel Tait, NPC

Impact measurement and evaluation is often thought of as a technical activity. So, it is tempting to spend lots of time figuring out the right systems, tools and processes. However, we need to redefine the quality of measurement to focus on the engagement of teams, timeliness and the efficient use of resources. Measurement and evaluation should answer important questions at the right time using the most robust data possible given the resources available.

The steps required to develop a learning organisation depend on factors like the leadership’s interest in learning, the overall culture of the organisation, its structure and external environment, among other things. Therefore, anyone leading this change process must understand their own organisation and consider these questions:

• What elements of the organisation and its external environment are compatible with learning and change?
• What elements of the organisation and its external environment could sabotage it?
• To what extent are the staff, particularly trustees and the CEO, interested in promoting learning in their work?
• What are colleagues in different roles already doing to learn and what else could help them?
• Are there funders or partners that are interested in promoting learning in the sector?
• When trustees, staff or volunteers have changed their way of working in the past, what caused that?
• What are our learning objectives as an organisation?

Based on this understanding, we should identify the opportunities within the organisation and in its external environment to promote the use of evidence.
Top tips on using evidence to improve your work

In the seminar the speakers provided some tips to enable organisations to use evidence to inform and improve the work they are doing:

How to start planning to develop a learning organisation?

1. **Agree on clear goals, create learning questions and a plan together as an organisation**, to ensure that everyone across the organisation owns these. These goals and the plan should underpin all measurement and learning activities. To draft a plan:
   - Define who the service is for and the change you want to create.
   - Prioritise data based on the questions that most need answering. Everybody has to make decisions in their jobs, from volunteers and frontline staff, to fundraisers and marketers, to senior management and trustees. It is important to understand what information people need to learn and to make good decisions.
   - Given the critical role that the leadership can play in promoting learning at the organisation, keep in mind that their most important questions tend be around scale, participant feedback, any change in the actions and lives of target groups, and at least a broad understanding of how programme costs relate to all of these.
   - Review existing data collection and analysis, and identify more widely what efficient methods to use.
   - Consider who is responsible and accountable for collecting, analysing, reporting and learning from data.
   - Identify the timing and milestones for when data collection, analysis, reporting and review meetings will happen.
   - Put all this information in one place if possible, eg, in a Word document and share with the rest of the organisation.
   - Decide when and how often your plan will be reviewed and updated.
Case study: How Gingerbread learnt to be led by the single parents they serve

Gingerbread is a 100-year-old national charity supporting single parent families to live secure, happy and fulfilling lives. Following a significant restructure and the appointment of a new CEO, Gingerbread started working towards a more evidence-informed model to figure out how they could best use their resources to meet the changing needs of single parents. Gingerbread received a grant for this work from the City Bridge Trust.

The key steps that Gingerbread took to embed learning across the organisation were to:

- Set up review and learning meetings with funders to re-assess engagement targets and approaches in a transparent manner
- Organise internal learning workshops to bring together colleagues across functions on specific subjects e.g. financial capability
- In new grant applications, budget time and capacity to support evidence gathering and service design
- Organise evidence-based service design workshops to present evaluation data back to teams to challenge assumptions

To prioritise the outcomes that it should target, it convened a research consortium to work alongside the leadership team to design and conduct research. The objectives of this research were to understand the needs of single parents and to identify gaps in Gingerbread’s knowledge in order to plan future areas of inquiry, partnership and opportunity. It commissioned and undertook qualitative research with single parents, a rapid review of Gingerbread’s data and of external evidence, and consultation with staff, trustees and external stakeholders including funders, third sector organisations with an interest in single parents, and evaluation experts.

The research helped them understand the practical and emotional needs of single parents. It also helped them understand what single parents’ value about Gingerbread, what they think Gingerbread could do better and what they would like Gingerbread to focus on. Based on this research, Gingerbread identified its priorities going forward—e.g., investing in building stronger partnerships. Gingerbread then used their findings and priorities to develop a change framework that highlights the short and long-term outcomes for its activities.

Finally, to embed this framework across the organisation, it

- Introduced new standardised decision-making criteria to align operational planning, fundraising and partner opportunities with the target outcomes
- Developed fundraising products and a three-year pipeline to raise funds for the priorities identified
- Started developing theories of change for different programmes, services and campaigns
- Embedded data collection across its work on target outcomes using standardised measures.
How to inform your organisation of plans and the value of evidence

2. **Tell everyone about your plans.** Help people within and outside the organisation to understand why they should care about learning and what the plans are. To enable this to be shared:
   - Make sure your learning and evaluation documents are jargon-free and written in plain English.
   - Write a brief version of the plans and priorities that can be shared. Work with colleagues in communications to do this right.
   - Review and update the organisation’s public materials and website to reflect learning and evaluation.

3. **Demonstrate the value of learning within and outside the organisation, by disseminating evidence and creating platforms to discuss it together and learn from each other.** To do this:
   - Set up regular review meetings across different levels, from trustees to frontline teams, to discuss progress, challenges and learnings.
   - Have colleagues highlight examples of how evidence is being used to improve the work and increase impact, to encourage others. Aim for a mix of roles and levels, think about who may be enthusiastic and gauge their interest.
   - Give people access to explore the data for themselves.
   - Make data and learning a standard agenda item in meetings.
   - Use technology to set up intranets or forums, use online tools like Slack, Medium and others for sharing information between teams.
   - Seek support from others in the sector, work on building a culture of learning within their organisations. For example, through the Charities Evaluation Working Group.
   - For leadership, develop concise and insightful dashboards. These could juxtapose costs, participant feedback and other results.

How to engage and manage staff through the change process?

- Engage colleagues and participants in measurement and evaluation activities, right from the design of processes to developing data collection tools, to get their buy-in. To do this effectively:
  - Use different platforms like a workshop, working groups or a survey.
  - Ask a sample of staff and users to comment (in person or remotely) on draft data collection tools—like questionnaires and sign-up forms.

4. **Define roles and responsibilities in impact management for all staff, including leadership,** to ensure that the organisation can continue to learn even when there is a change in leadership roles.

- Senior staff and trustees can set the tone. They can promote learning and evaluation as an essential part of the service like finance and risk. They can set up systems, allocate resources, recruit the right people and communicate what the service learns from the data and how they are acting on it.
- As the interface between senior and frontline staff, managers play a crucial role in building a learning culture. They can promote good practice, connect people who could learn from one another, take time to understand the results, and think about what can be done to improve.
- Frontline staff and volunteers are often responsible for service delivery and data collection, meaning they can offer useful feedback about what is happening on the ground.
- Targets groups should be able to share their views and contribute to the development of the service. To enable this:
Developing a learning organisation

- Clarify who is accountable for planning, collecting, reviewing and sharing data. Consult on these roles.
- Run a workshop for trustees to explore their commitment to learning.
- Make time to discuss learning in board meetings, management meetings and team meetings.
- Update job descriptions, objectives and performance reviews to include responsibilities for collecting, analysing and using data.

5. **Recruit and train people.** Staff and volunteers will need the right commitment and skills to learn. Hire someone with data analysis responsibilities who can:
   - Clean and manipulate data.
   - Extract insight from data through analysis: ask the right questions and interpret results.
   - Have a basic knowledge of statistics and relevant analysis programmes like Excel. For example:
   - Think about the skills you need and if there are any skills gaps in your organisation. These could be around strategy, managing measurement, technological solutions amongst other things.
   - Look into training for trustees, management and staff in how to collect, analyse and review data.

6. **Accept mistakes and failure.** It is important to promote a mindset that focuses on improvement. Disappointing results should be accepted and explored, and staff should feel free—even encouraged to do this. **To do this:**
   - Encourage leadership and trustees to be open about their mistakes and failures, and how they have learned from them. This will create a culture where staff are not afraid to acknowledge and learn from their own mistakes.
   - Talk to staff about situations when things did not go to plan and what could have been done differently.
   - Discuss examples of what did not work in internal and external reports and meetings.

**How can you efficiently resource efforts to promote learning?**

7. **Be efficient in measurement and evaluation.** Shortlist questions and indicators for which data already exists or on which accurate data can be gathered without much cost. Take three simple steps to gather data on these.
   - **Answer questions around long term impacts of programmes** on people’s quality of life using existing evidence. Systematic reviews and evidence gap maps enable us to easily access all the evidence on a type of intervention in one place. Systematic reviews and evidence gap maps (EGMs) are both types of evidence that are public goods, which means they are widely available for use.
   - **Monitor performance using administrative data** especially track resources invested, activities done, and numbers of participants reached.
   - **Gather programme feedback** from target groups and remaining data on changes in participant behaviour through quick studies over email, phones, texts, tablets, in person etc.

8. **Make data collection and data use as easy as possible.** Perhaps the most important factor in securing support from the frontline is designing systems that make data collection and the use of data integral to the day-to-day work, not an add-on.
   - Use online platforms so that we can directly enter data into the system and set up automated dashboards. Some of these are free like Google data studio. Other data visualisation software include Tableau, Powerbi.
   - Spend time shadowing and talking to staff to understand the complexities and processes involved in collecting, reviewing and sharing data.
• Think about what gets in the way when you collect data and consider how frontline staff could be supported in doing this.

• Think about how frontline staff could have more meaningful conversations with service users to understand their journey, in addition to or instead of the current form filling exercises.

• Survey staff or set up a feedback meeting to get their views on the value of the data they currently collect, the time required, what they would like to learn, and what can be done to improve this.

9. **Try to raise funding from a measurement plan:**

• Build in these costs across different proposals. The chances of securing larger measurement and learning budgets from more evidence and impact driven funders would be higher.

• Separately fundraise for measurement and learning priorities, either alone or in partnership with other experts.
Developing a learning organisation

Final thoughts

To begin developing an organisation where you learn from evidence and use this to make decisions to improve the impact of work on people’s lives, you should set up measurement systems that respond to a demand. This could be achieved by answering questions that matter to staff across all levels from frontline to the CEO, and to partners such as, government and funders. We must continue to grow that demand by communicating existing evidence to all decision makers in a simple, concise yet insightful manner. Finally, to institutionalise learning in your organisation, its structure, processes and culture, you need to take persistent incremental steps towards it. It can be useful to adopt principles of change management in this process. You should also remember that like any change, the process of developing a learning organisation takes time and requires patient efforts.
Further reading


Graham, J.T. (2018) *Top tips for using better information to scale social innovation projects*, NESTA

NPC et al. (2018) *Knowledge and learning* for social projects aiming to grow or ‘scale’: A checklist for social innovators looking to demonstrate their impact, improve their work, and build a learning culture


Preskill, H. and Mack, K., *Building a strategic Learning and evaluation system for your organisation*, FSG


NPC (2017) *Data with Destiny*

Web Center for Social Research Methods, *An evaluation culture*

David Damberger, *Talk on learning from failure*, TEDx

Social Ventures Australia, *A case study and podcast about developing an outcomes-focused culture*

*Inspiring Impact* website

Infographic on building a culture of evaluation

Impetus PEF, *Impact Management training video series and workbooks*

Impetus PEF (2016) *Driving Impact: helping charities transform the lives of disadvantaged young people*
NPC is a charity think tank and consultancy. Over the past 15 years we have worked with charities, funders, philanthropists and others, supporting them to deliver the greatest possible impact for the causes and beneficiaries they exist to serve.

NPC occupies a unique position at the nexus between charities and funders. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success.

**Increasing the impact of charities:** NPC exists to make charities and social enterprises more successful in achieving their missions. Through rigorous analysis, practical advice and innovative thinking, we make charities’ money and energy go further, and help them to achieve the greatest impact.

**Increasing the impact of funders:** NPC’s role is to make funders more successful too. We share the passion funders have for helping charities and changing people’s lives. We understand their motivations and their objectives, and we know that giving is more rewarding if it achieves the greatest impact it can.

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