



Becoming a
Learning Organization
is a **Journey**, not a
Destination



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by Matthew Carr and Johanna Morariu, with Diana Scearce

In 2020, the Walton Family Foundation distributed \$35 million in emergency funding to help frontline grantees respond and adapt to the COVID-19 pandemic. A [retrospective evaluation](#) of the foundation's Covid Relief Fund surfaced learning about emergency grantmaking practices to hold onto — and what to improve on when future crises strike. Foundation staff helped with interpreting and making sense of the evaluation findings about impact, and [surfaced a set of polarities](#) that helped us create a better understanding of the trade-offs that were made along the way; a staff advisory group focused on effective grantmaking weighed in on process findings and recommendations for improving future emergency response efforts, and foundation leadership further built on these reflections and approved internal action steps to improve day-to-day grantmaking practices.

Today an internal cross-functional advisory committee is putting the learning into action and CEO Caryl Stern has shared key learnings in the [Chronicle of Philanthropy](#). The foundation acted in response to the crisis, intentionally learned what worked well and what didn't, and is now using these insights to inform action. Experiences like this one are helping the foundation become a stronger learning organization.

Our Learning Journey

Becoming a learning organization is a long-term commitment — a journey, not a destination. The Walton Family Foundation has been on this journey for several years now. We have had successes, setbacks and detours. Along the way, we learned a lot about what it takes to live into our value of continuously improving through learning and reflection. Our central insight so far: becoming a learning organization requires taking [a systems-change view](#) and applying it to our own work. This requires engaging an array of mutually reinforcing levers, ranging from targeted interventions to catalysts for deeper shifts, which together create a broader culture change. They include:

- 1. Building staff capacity and skills specific to strategic learning**
- 2. Adopting a mix of customized and standardized structures**
- 3. Embedding learning in ongoing work**
- 4. Committing, championing and modeling from leadership**
- 5. Nurturing trusting relationships and attending to psychological safety**

While there is no single route to becoming a learning organization, we hope that sharing the foundation's practical experience will help others chart their own paths.

The Walton Family Foundation's Commitment to Being a Learning Organization

In 2020, as part of a new strategy cycle that increased the foundation's focus on complex systems change, the foundation deepened its commitment to being a learning organization. With strategic plans as their guide, teams would navigate the uncertainty inherent in systems change grantmaking by learning about what works and adapting their strategies over time to achieve the greatest impact possible. Our team — the Strategy, Learning and Evaluation Department ([SLED](#)) — was charged with helping to further build habits of strategic learning across the organization and supporting evidence-based assessments of progress, a key input to the strategic learning process.

It was not a new endeavor. In 2017, the foundation's Evaluation Unit was renamed SLED, reflecting an [increased focus on both strategy and learning](#) in support of evaluation efforts. In 2020, when developing SLED's new five-year strategic plan, the foundation went a step further. We explicitly placed strategic learning at the center of all our work, both strategy and evaluation. By [strategic learning](#), we mean the use of data and insights to inform decision making about strategy so that it evolves to reflect what we know and our impact (and our partners' impact) is deepened. We also committed to embedding culturally relevant and equitable evaluation (CREE) practices in everything we do. We see our commitments to strategic learning and CREE as mutually reinforcing. Together they invite us to value diverse ways of knowing, to grow shared ownership of insights and implications, to cultivate the trusting relationships that facilitate candid reflection and learn from our successes and our errors.

The foundation has become a stronger learning organization over the past three years, since elevating "[Learning and Leading Together](#)" as a core value and institutional priority. Most notably, there is more alignment among staff about what it means to be a learning organization, greater organizational capacity to champion and facilitate strategic learning and stronger institutional structures in place for bringing this commitment to life. We have also run into plenty of roadblocks and made some wrong turns. As a result, we are learning a lot about what it means to be a learning organization.

What We're Learning About Becoming a Learning Organization

1. Building staff capacity and skills specific to strategic learning

Strategic learning requires making sense of data, surfacing insights and identifying or growing knowledge about specific topics. While all types of learning contribute to being a learning organization, it's important to grow awareness of strategic learning (differentiated from other forms of learning) and model it.

The foundation is building these muscles by identifying and assessing the specific skills and mindsets that contribute to strategic learning and engaging in targeted capacity-building (see the table below). For instance, SLED team members have been trained in designing and [facilitating group dialogue](#). Team members support one another in applying these skills to sessions they hold for other teams to make sense of data, research and evaluation findings. In addition, the SLED team has hosted talks and trainings open to all foundation staff that are “strategic learning adjacent,” such as [cognitive bias](#) with Dr. Daniel Kahneman.

We are also reframing the role of the SLED team — from a primary focus on “doing” evaluation to being coaches and partners to program colleagues as they navigate complex challenges and engage in their learning processes. Not surprisingly, the foundation’s learning needs are much greater than our team’s capacity. We are finding it essential to bring in outside support as well. For example, alongside the [K-12 Education program](#) we have engaged external consultants to serve as multi-year [learning partners](#) to each of the strategy teams. To be successful, these partnerships need to be structured to facilitate, not outsource, the learning.

The transitioning of SLED's role within the foundation and the development of the associated skill sets is taking time and persistence. We want our colleagues across the foundation to see SLED team members as learning and adaptive strategy facilitators and coaches. And, our team members are adapting to the changing nature of their work as well. For most of us, this is [a significant pivot](#) from our training as evaluators.

Illustrative Strategic Learning Capabilities

Mindset & Behaviors

- Build trust so individuals feel safe sharing their opinions and beliefs
- Explore areas of interest — existing and new
- Be aware of and manage cognitive biases
- Be comfortable with uncertainty, complexity and adaptation
- Take calculated risks and run experiments that apply new ideas to the work
- Acknowledge, share and learn from challenges
- Be accountable for learning and adaptation

Skills

- Identify key assumptions and hypotheses (in strategies, grants, etc.)
- Clarify what is being tested and draft hypotheses
- Read data and findings about grants and strategies and develop insights
- Design and facilitate productive group dialogue
- Apply insights and lessons learned to decisions, grants and strategies
- Document thinking so that it can be collectively shared, revisited and improved over time

2. Adopting a mix of customized and standardized structures

Adults typically [learn best](#) when learning is self-directed and customized to their context and need. At the same time, learning doesn't necessarily happen when the need is present. A mix of standardized and tailored structures that facilitate learning help bridge the gap.

The foundation has developed standardized structures that elevate and drive learning, while also supporting customized approaches to meet teams' needs. On the standardized side, we have incorporated strategic learning into foundation-wide processes, like our annual [Strategy Management process](#). At set points during the year, program leads meet with the executive director, chief strategy officer and SLED to share updates about their strategies — recent developments, progress, setbacks and new insights. Program leads are asked to identify the ways in which they are adapting and refining their theories of change and grantmaking strategies in response to changing environments and learnings about what works. The process of defining and surfacing these [“micro-shifts”](#) has helped capture more of what we're learning and drive intentional strategy adaptation over time.

Initially, we planned to provide standardized staff trainings to build awareness of strategic learning and level-set on basic capabilities. As we learned more about staff interests via a self-assessment survey and sought input from a staff advisory group, we realized that trainings geared toward all program staff may not meet the diverse and context-specific nature of teams' needs. As a result, our plans took a detour to instead focus on building skills in more tailored ways. Our capability work was standardized through three short written pieces defining concepts — [strategic learning](#), learning agendas and micro-shifts — and customized in how these concepts were shared and reinforced across the foundation.

SLED team members also partnered with each of the program areas at the launch of the new strategy to design a set of pilot projects for applying strategic learning to current or planned work. These projects ranged from using research findings to shape nascent strategies to designing performance measures connected to learning questions. The projects were then elevated as illustrations of strategic learning in action as SLED worked to build understanding of what strategic learning is and why it matters.

As we design and implement these structures, one of our key lessons has been that we need to maintain a balance of standardized and tailored structures to support learning and, in doing so, prioritize just a few processes so we don't lose focus. In addition, the balance of standardized and customized structures should evolve over time as knowledge and skills grow and become more embedded into our work. Allowing for more customization early on can lay the groundwork for establishing more effective standardized approaches later.



3. Embedding learning in ongoing work

Enthusiastic efforts to elevate organizational learning can backfire if perceived as learning just for the sake of learning. To achieve its potential and gain buy-in, learning needs to be an integral part of strategy adaptation and understood as critical to impact. To that end, the foundation has been refreshing core processes to integrate learning into existing workflows. This is happening with foundation-wide processes, like our approach to grant evaluation in which there is now more dialogue-based reflection with grantees. Both grantees and foundation staff are held accountable for learning and strategic adaptation in service of impact (versus meeting pre-designated targets). Processes are also shifting at the team level. For example, our [Environment program](#) has developed its learning agenda to align [with theories of change](#) for the various program strategies. SLED officers then partner with program officers to gather specific data, engage in sense-making and identify possible strategy implications. In the [Home Region program](#), the team is building a user-friendly, learning-oriented dashboard to support a shared view of progress, challenges and micro — shifts across the program’s strategies.

Of course, learning doesn’t become embedded overnight. At times it requires designing and establishing new processes, tools and capabilities. This requires dedicated time, effort, resources and attention to change management. That happened when we developed program-specific learning agendas. Program teams collaborated with SLED officers to articulate questions critical to address for high-impact strategy implementation; from there, they developed Key Performance Indicators — data points that would inform progress on key goals and learning questions. At the start, we envisioned the learning agendas being completed shortly after strategy launch. In the end, some were completed within a few months, while others related to nascent strategy areas are just now being finalized. We had to revise our expectations, slow down and take the time needed to co-create learning agendas meaningful to teams’ evolving understanding of their strategies and theories of change.

4. Committing, championing and modeling from leadership

Being a learning organization requires consistent and persistent leadership. The foundation's commitment, championing and modeling of learning at the senior-most levels continues to provide significant tailwinds. Learning is core to the foundation's strategic vision and five-year plan. It is promoted by the members of our board and the leadership team and is reinforced through the foundation's stated values of "Learning and Leading Together."

Senior leaders are modeling strategic learning in our weekly grants review meeting, which is open to all staff. Historically, these meetings have focused on addressing technical issues and formally approving grants. Now, leadership is working to shift to a learning focus — elevating innovative approaches, complex grants and scalable opportunities; exploring how program officers translate strategy into grants and portfolios that evolve over time; identifying connections between specific grants and [our shared goals](#) and values; and creating conditions for open, learning-oriented dialogue grounded in a spirit of inquiry, curiosity and continuous improvement. These meetings have rotating facilitation from the leadership team. Leadership modeling of these shifts is critical. It's also important to get specific about how to put learning at the center of these meetings (e.g., encouraging staff to share their thought processes and what may have been learned from challenges and mistakes). Making these shifts will take time and a consistent intentionality from the entire leadership team.

To shift our organizational system toward a stronger learning orientation, we need to have more than just a few champions at the top. We need positive reinforcement and modeling from leaders at all levels of the organization, along with patience, persistence and a commitment to showing the value of strategic learning for improving everyone's work.

5. Nurturing trusting relationships and attending to psychological safety

Cultivating an environment that invites authentic learning requires trusting relationships and [psychological safety](#) (an environment where teams can engage in candid and creative inquiry). Trust and safety grow when teams get to know and respect one another, when there is openness to diverse and sometimes conflicting perspectives and when they can lean into learning from failure.

One space where the SLED team is helping foster trust and psychological safety is through learning sessions tied to one of the foundation's [three shared goals](#): Community-Driven Change, Collaboration and Diversity, Equity and Inclusion (DEI). In the sessions, staff from across the foundation are invited to share their work with colleagues in an informal setting — helping presenters and attendees develop as active [learners and contributors](#). We are also working to equip staff with skills for leaning into divergent viewpoints with mutual respect and curiosity through [polarity thinking](#) and recently hosted a training led by Co-Creative to help us move in this direction.

However, the SLED team has had to be considerate of knowing when to lean in and champion learning and when to step back. If SLED tries too hard to promote learning, we risk learning becoming siloed as a SLED function. Like many aspects of culture change, nurturing trusting relationships and attending to psychological safety is a long-term endeavor made possible by the contributions of leaders from across the organization.

What's Next

Engaging more external partners in strategic learning (e.g., grantees, funding partners and community stakeholders). This will bring richness and greater equity to our learning by engaging those closest to the issues and increasing ownership. The refresh of the foundation's [grant evaluation approach](#) is an important step in this direction. We can do more to learn from and with partners while attending to the power we hold as a funder.

Making our learning more visible and easily accessible for staff. We will be rolling out a user-friendly internal knowledge management system intended to provide a backbone for ongoing learning and adaptation. Promoting habits of use will be key to the success of this new learning tool.

Growing comfort with taking smart risks and learning from failure. It's a natural tendency to default to playing it safe and focus on what's working. However, embracing failure is key for the systems change the foundation aspires to catalyze. We will be exploring opportunities to learn from what hasn't worked and apply these insights to ongoing strategy adaptation.

To bring these priorities to life, the SLED team needs to continue our own journey to evolve our role as partners to programs in learning and strategy adaptation. We must expand and hone our skill sets and challenge ourselves to continue building our own learning mindsets.

The foundation will never declare its work to strengthen organizational learning complete. It will be an ongoing and, at times, circuitous journey. While on this journey, we will continue to grow as individuals, teams and as an organization poised to make a greater contribution to social and environmental systems change in the long-term. In our case, much like learning itself, the journey is the destination.

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