



Learning in Responsive Grant-making:

A look at the literature on
learning organisations

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Introduction

This background paper was written to inform discussions at IVAR's 2017 Evaluation Roundtable, which focused on **what good learning looks like in responsive grant-making**. This theme reflects findings from a feedback survey following the September 2015 convening, which highlighted the challenges to traditional practices posed by the current environment, and a willingness to invest in learning as an integral part of the strategy and actions of grant makers.

The 2015 Roundtable Survey highlights the difficulties trusts and foundations face in finding time and appropriate methods for learning:

- *'Only 18% agreed that they have effective mechanisms for disseminating learning across the organisations. Reasons included lack of time and space to reflect on evaluation findings, as well as the absence of systems or supporting cultures to capture and share knowledge.'*
- *85% of survey respondents stated that getting good data and the right mix of data was a challenge.*
- *45% said that they are not content with the way their organisations currently make use of information.'* (IVAR 2015)

In this paper, we have used the idea of the 'learning organisation' as a starting point to explore drivers, methods and themes from across the literature to start to shed light on what good learning looks like in practice.

The case for investing in learning

In an increasingly uncertain environment – with continued austerity, the shrinking state and reductions in public funding – trusts and foundations are playing an ever more critical role in supporting social welfare organisations that work to relieve poverty and disadvantage, tackle injustice, and promote social change. This environment requires 'continuous transition', which means being able to adapt to new and shifting sets of circumstances (IVAR 2013). Learning and adaptation is also crucial in helping trusts and foundations to evaluate what is – and crucially what is not – working, and to make informed decisions about where to invest time and resources instead of repeating mistakes of the past or continuing to run programmes that don't work.

Learning activity generally has at least one of three intended uses: to promote accountability, to examine impact or – the focus of this paper – to support strategic learning (IVAR 2014). These three uses are distinct but related, and difficult to manage simultaneously. Pressure on resources for both funders and grantees raises concerns about proportionality when it comes to data collection and reporting. Responsive grant makers – working on less tightly bound programme strategies – also struggle to make the most of data available, particularly when this data is gathered from diverse contexts (IVAR 2015). Making sense of data is particularly difficult for grant makers working across wide geographic areas and for those collaborating with many stakeholders across the social policy environment (Darling 2010).

'Learning' in the literature

The findings from the 2015 Evaluation Roundtable survey suggest that foundations generally understand a 'learning organisation' as one which '*actively creates spaces and opportunities for knowledge and intelligence to inform and shape its day-to-day practices, as well as its future direction, and embeds these within its culture*' (IVAR 2015). The following discussion briefly explores literature on the idea of 'the learning organisation' and its key elements, and then turns to the related idea of strategic learning.

The 'learning organisation' is an aspirational idea which draws on theories of 'organisational learning' which have been present in management literature for many decades.¹ The terms 'learning organisation' and 'organisational learning' are often used interchangeably in the literature. Some writers use the term 'organisational learning' to refer to the 'how', - i.e. the activities and processes involved in building and using knowledge (Preskill and Torres 1999a). The 'learning organisation' can be seen as the 'what', and is often used to describe principles or characteristics of an organisation that learns as a collective entity and turns this learning into practice (Senge 1990; Garvin 1993; Smith 2001).

The idea of the 'learning organisation' was popularised in the 1990s by Peter Senge's seminal book, *The Fifth Discipline* (1990). Since then, theorists and practitioners have taken the idea into many different disciplines and sectors (Smith 2001; Easterby-Smith et al 1999) and there is no real consensus on method of implementation. While there are many definitions and perspectives through which to view 'the learning organisation', it can be understood as 'an organization skilled at creating, acquiring and transferring knowledge, and at modifying its behaviour to reflect new knowledge and insights' (Garvin 1993: 80). Crucially, this definition suggests that 'learning' has not occurred until behaviour is modified, which means that learning organisations should be good at systematically posing and answering meaningful questions that have implications for their work, as well as adjusting resources and actions to reflect new knowledge and understanding.

While all organisations learn to a greater or lesser extent, one thing that distinguishes a learning organisation is the ability to continually learn and transform in a way that moves beyond 'single loop learning' to 'double loop learning' (Fig.1) (Thomas and Allen 2006). Single loop learning is the attempt to solve a problem without varying the method or questioning the original goal. In contrast, double loop learning focuses on examining and testing an organisation's underlying assumptions about the nature of the problem and the leverage points for change (Argyris 1991). Double loop learning can be seen as critical to helping organisations make informed decisions in rapidly changing and often uncertain contexts.

¹ Donald Schön was one of the first and most influential thinkers in the fields of learning systems and reflective practice. See for example Schön, D. (1973) *Beyond the Stable State* or Argyris, C. and Schön, D. (1978) *Organisational learning: A theory of action perspective*

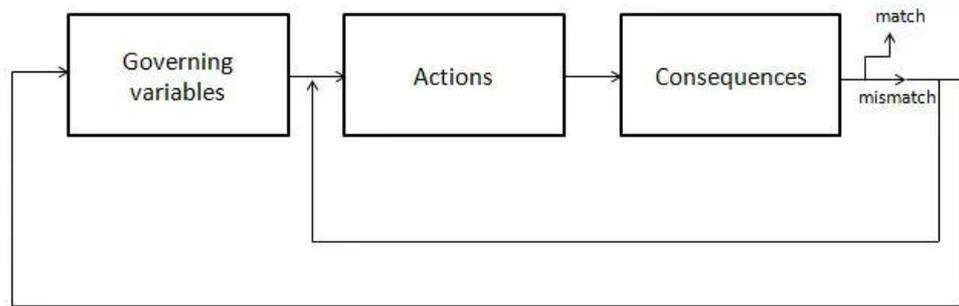


Figure 1 Single and Double Loop Learning (Argyris 1999)

Several common characteristics of a learning organisation can be identified from across the literature (Kerka 1995; Aikin et al 1997; Garvin 1993). For example, learning organisations:

- Provide continuous learning opportunities
- Use learning to reach their goals
- Link individual performance with organisational performance
- Foster enquiry and dialogue, making it safe to share and openly take risks
- Embrace creative tension as a source of energy and renewal
- Are continuously aware of, and interact with, their environment
- Create a supportive culture
- Integrate learning into strategy and policy
- Problem-solve systematically
- Experiment with new approaches
- Learn from their own experience and develop organisational memory
- Learn from the experiences and best practices of others
- Transfer knowledge quickly and efficiently throughout the organisation

Organisational learning takes place at an individual level, a team or group level, across or between departments, functions or operations, and at a strategic level (Pearn 1995 in Britton 2002). In practice, there will be – and should be – considerable overlap between these levels. Learning will also depend on organisational context (Örtenbald 2013) and size (Garavan 1999).

The literature on learning organisations is largely focused on for-profit organisations. This is not always applicable to foundation and grantee level learning, because grant-making is an external-facing enterprise, and the boundaries of the philanthropic organisation as a learning entity are porous. A foundation's ability to achieve desired results depends on the learning of grantees, as well as its internal operations and its own capacity to learn. While achieving meaningful results in the voluntary sector requires learning at multiple levels and between many organisations, there are lessons from the simpler, more constrained practice of 'organisational learning' in private sector companies that nonetheless offer guidance to grant makers considering how they learn within their organisations and with grantees.

Evaluation for strategic learning

More recent literature specifically focused on philanthropy from the US has moved away from the terms 'organisational learning' and 'the learning organisation'. This more recent body of work tends to refer almost exclusively to 'strategic learning'.

'Strategic learning means using evaluation to help organizations or groups learn quickly from their work so they can learn from and adapt their strategies. It means integrating evaluation and evaluative thinking into strategic decision making and bringing timely data to the table for reflection and use. It means making evaluation a part of the intervention – embedding it so that it influences the process.' (Coffman and Beer 2011)

Evaluation² for strategic learning is essentially the use of data and insights, collected through various evaluation-related activities, to inform decision-making about strategy. It attempts to bridge the gap between evaluation and strategy so that learning can be implemented, processes can be adapted and lessons can feed into future planning. It assumes that evaluation has a 'seat at the strategy table' and buy-in from the decision makers who have influence over strategy. The approach can be applied to a single project or an entire organisation or network of organisations. It is particularly suited to complex contexts where rapid adaptation and innovation are required for success (Williams 2014).

Designing data collection and evaluation to support decision-making about strategy requires a shift in thinking about what questions to ask, how data is collected and the framing of findings, bearing in mind that evaluation data to inform strategy can come from a wide variety of sources and methods – including monitoring and reporting – as well as real-time processes such as debriefs and group discussions. Data should be timely and useful for informing key strategic questions, and this requires organisations to think about how strategy gets created, executed and adapted, and what data is meaningful for informing strategic decisions (Williams 2014).

Strategic questions to support results

The following strategic questions, if answered, could support grant-making and voluntary sector organisations' ability to achieve results:

- What capacities does an organisation need to be able to effectively implement a particular programme?
- What kinds of interventions work best to build specific capacities?
- What kind of programme or intervention works best in a particular context, and what does it take to meet the needs of the evolving context?
- How are changes in the policy environment affecting the ability of an organisation to achieve its objectives?
- What changes should be made to a programme given how the demographics of the population it serves are changing?

² We understand evaluation as: 'a broad range of activities – performance management (e.g. reporting and monitoring), knowledge management, organisational learning and strategic learning. Because the shape of the evaluation function in UK trusts and foundations has begun to expand in recent years, the Roundtable focuses broadly on the use of, and demand for 'evaluative information' rather than solely on evaluation.' (IVAR 2015)

- In what ways is one organisation better equipped than another to provide a particular service or lead a change effort?
- How has the introduction of a new actor or stakeholder to the landscape affected the relationship between organisations that serve the target populations?

Answers to these kinds of questions could help grant makers in a number of ways, for example choosing between grant applicants, coaching grantees on programme adjustments, providing appropriate capacity supports and calibrating the grant amounts. If these questions are shared with individual grantee organisations, they can make better choices about programme design, allocation of resources, staff development, and partnerships.

Organisational and group culture, structures and processes can support or hinder reflection, and the use of data and evaluation for strategic learning works best within a culture that supports risk taking, learning and adaptation (Coffman and Beer 2011). A learning culture is largely created and reinforced by leaders and is supported by organisational processes and incentives (Williams 2014). Organisational infrastructure that supports learning requires systems which actively promote, facilitate and reward the development of a learning culture, and trust needs to exist throughout the organisation (Williams 2014). An authentic leadership commitment (for example, humility around learning, curiosity, setting an example, tacitly giving permission, etc.) can help set a learning culture (Williams 2014).

Many of the strategic questions which foundations need to learn are the same as those of voluntary organisations. However, the strategic concerns of grant makers and grantees are not entirely the same, and often, grant makers need to embark on their own internal learning processes that can answer uniquely philanthropic questions, such as: Which programmes and organisations should we fund? What are the other forms of influence beyond grant-making that we could leverage to achieve results? That said, grant makers are dependent on the learning of their grantees (which requires evaluation) and other types of intelligence gathering being integrated and conducted in partnership.

Evaluation also needs to emphasise the context in which it is taking place; evaluators need to be flexible and timely, and ready for the unexpected. The effective adoption of strategic learning will depend on 'organisational readiness' to adapt to change, and it is likely to involve starting small and building over time. Evaluation for strategic learning also requires adequate resources and flexibility to adapt (hands-on evaluation and staff time).

Linked to strategic learning is the idea of emergent learning, which is essentially a set of tools to support people turning learning into action (Darling 2010). Emergent learning is a cyclical process which assumes that people learn through actions/work, and requires systematic observation of whether expected results actually occur or not. Essentially, people develop and test a hypothesis, observe what occurs, look for patterns, draw insights and then revise their hypothesis accordingly. Research and practice in this field have focused on work habits and practices that impede or promote learning, including leadership, decision-making, and knowledge management (Darling 2010:6). Emergent learning can be described as:

'...learning which arises out of the interaction between a number of people and resources, in which the learners organise and determine both the process and to some extent the learning destinations, both of which are unpredictable. The interaction is in many senses self-organised, but it nevertheless requires some constraint and structure. It may include virtual or physical networks, or both.'
(Williams, Karousou and Mackness 2011:41)

Emergent learning tools and practices are intended to help people articulate framing questions, intended results, assumptions and hypotheses about how to achieve results, and metrics for recognising successful results and outcomes. These tools are designed to encourage people to compare experiences with peers as a source of robust thinking.

Particular attention is paid to actions on which data is gathered to help reflection on results, the idea being that hypotheses and action plans can then be refined.

This emergent learning process echoes the action research (plan, act, gather data and reflect) cycle:

'By that definition, learning is about more than adjusting actions; it is about adjusting thinking in order to be able to do better in the future – to articulate an outcome, predict the challenges inherent in a situation, choose the right approach given that situation, translate that into an actionable plan, enact it, and assess whether or not it achieved the expected results.' (Darling 2010:10)

In complex and changing situations with multiple actors, the 'right' answer does not exist for very long. The 'right' answer represents current best thinking to get the results intended. Emergent learning enables organisations or networks to adapt their strategies and action plans as knowledge emerges through experience.

Creating conditions for learning

Across the concepts outlined above, it is possible to highlight some distinct but interrelated themes or organisational elements which might be useful in thinking about what supports learning in responsive grant-making. These are outlined below.

Culture

Organisational culture can facilitate or hinder learning. Culture refers to far more than just the way things are done in organisations: *'It involves the articulation and consistent, long-term promotion of the values, norms, and daily behaviors that allow people, organizations, and communities to align their actions in a disciplined way that contributes to progress.'* (Celep, Brenner and Mosher-Williams 2016: 116).

A trust or foundation's culture is central to establishing an environment conducive to learning both inside and outside an organisation:

'When the work of a foundation's staff is aligned with the values of the organization and those values are evident in relationships with the grantees, networks, and communities necessary to create change, trust and loyalty are established. Only then can the authentic collaboration that is required to achieve transformational change occur.' (Celep, Brenner and Mosher-Williams 2016:117).

This supports authentic collaboration which is needed in today's challenging environment. While there is no 'right' organisational culture, research by GEO (Grant Makers for Effective Organisations) has highlighted the following attributes of foundation culture that US grant makers and non-profits have identified as important for effective philanthropy:

- Collaboration and partnership
- Diversity, equality and inclusion
- Respect and humility – by creating a culture which mitigates the power dynamic inherent between grant makers and grantees and communities, based on a belief which presupposes that grant makers do not have all the answers and an approach which values the expertise of those who are closest to the issues
- Responsiveness

- Transparency and trust
- Curiosity and learning

In learning organisations, the dominant culture should promote trust and appreciation, support risk taking, reduce fear of failing, reward courage and value lessons from mistakes (Preskill and Torres 1999a; Aikin et al 1997). Crucially, a learning culture also adapts through experiences and becomes more effective over time (Williams 2014).

Culture can be one of the most challenging aspects of organisational learning. It is largely invisible to those embedded in it and it can, therefore, be difficult to identify drivers or to pro-actively change it. A learning culture is generally established and reinforced by leaders and is supported by organisational processes and incentives. (Williams 2014:7)

A starting point may be to identify formal and informal processes, norms and patterns of interaction in order to understand how these manifestations promote or hinder learning. An example of an informal norm may be whether programme staff are more likely to receive verbal praise or recognition from leaders when they offer a detailed and tightly constructed rationale for a funding decision that answers all potential doubts, or when they are candid about risks, uncertainties and unknowns. Culture may also manifest during decision-making: whether staff are more likely to weigh the pros, cons and trade-offs of multiple options before coming to conclusions, or whether they are likely to pick a way forward and then advocate for it. The former suggests that staff feel comfortable with an emergent way of working which admits to not having all the answers at the outset. A culture of enquiry engages staff and grantees in reflection, in dialogue and in asking critical questions about values, assumptions and beliefs (Preskill and Torres 1999a).

Leadership

Leaders play a key role in establishing cultures which support or hinder learning (Williams 2014:12). Leadership styles that show a sincere commitment to learning and adaptation are more likely to create a learning culture. This is partly about modelling behaviours; for example, if leaders demonstrate in front of their staff that their understanding of an issue or their thinking about a problem has changed because they have learnt something, it can signal to staff that this is a valued practice. This can also be said for the funder/grantee relationship. Funders who model this behaviour by admitting when they may have been wrong, being candid about how their thinking has changed and why, and being clear about their own uncertainty, are more likely to elicit similar candour and reflection from grantees.

In organisations facing complex issues, leaders cannot be expected to have all the answers; rather the task of leadership is to convene conversations where others can innovate and create new knowledge. Good leaders remove barriers and empower staff and grantees to take action. In this sense, leaders are *'designers'*, *'stewards'* and *'teachers'* (Senge 1990). However, staff are more likely to live values and behaviours if they have had a chance to shape the culture (Celep, Brenner and Mosher-Williams 2016: 122).

Learning organisations foster leadership potential throughout the organisation and reduce distinctions, such as those between management and staff, between strategists and implementers, between support and professional staff (Roper and Pettit 2003), and between grant-making staff and grantees. Learning organisations are built around information and communication, rather than hierarchy (Drucker 1990 in Robinson 1994). Flatter organisational structures which nurture the leadership potential in all staff tend to create closer connections with – and greater accountability to – partners, foster better internal communication and promote the efficacy of teamwork (Roper and Pettit 2003).

Knowledge management

Capturing, using and sharing learning requires a range of systems and processes often referred to as *'knowledge management'*. This involves *'knowledge acquisition, creation, refinement, storage, transfer, sharing, and utilization'* (King 2009:4). Knowledge will be both implicit – held in documents and electronic repositories – as well as tacit – held

within the minds of individual employees or teams, as well as being embedded in an organisation's processes and relationships (King 2009:4). Knowledge management aims to leverage and improve the organisation's knowledge assets to support knowledge practices, improve organisational behaviours, lead to better decisions and improve organisational performance. Many organisations are now using social media or building more user-controlled platforms such as wikis and blogs, that bring with them even greater organisational transparency and give rise to more diverse perspectives in the organisational conversation (Dixon 2010).

Learning practice

Learning process and practices are ways of building reflection and sense-making into the work, either in a regular cycle or in response to particular windows of opportunity or crises (Williams 2014). Such practices might involve regular reflective staff meetings and project meetings, as well as groups who self-organise around a common interest and expert networks, for example communities of practice. Some organisations are experimenting with new ways of meeting together for shared analysis, sense-making, and exploration of implications using methodologies such as Knowledge Cafés³ and Appreciative Enquiry⁴). Capturing tacit knowledge can be particularly challenging for organisations. Social processes which facilitate learning and motivate individuals to participate are required to ensure that knowledge which exists in the minds of individuals can be transmitted to groups, teams and networks.⁵

Expected benefits and challenges of striving to be a learning organisation

Organisational learning is a process which unfolds over time as a result of organisational attitudes, commitments and management processes (Garvin 1993). Ultimately, if done well, insights from learning activities materialise in changes in practice and behaviour and improved outcomes (Garvin 1993; Senge 1990). Specific benefits include (Garvin 1993; Senge 1990; Whitbeck 2014):

- Greater flexibility and responsiveness to support organisations coping with inevitable internal and external change.

³ Used to stimulate and create collective intelligence through conversations. Can cross-pollinate ideas, and surface new insights into questions or issues that are collectively important. <http://www.qihub.scot.nhs.uk/knowledge-centre/quality-improvement-tools/knowledge-cafe.aspx>

⁴ <https://appreciativeinquiry.case.edu/intro/whatisai.cfm>

⁵ For a useful resources with practical methods and tools for learning see Ramalingam, B. (2006) Tools for Knowledge and Learning: A Guide for Development and Humanitarian Organisations, London: ODI <https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/188.pdf>

- Stronger working relationships and connections between colleagues and with partners.
- More democratic organisational structures, where power is distributed and individuals – including grantees and, where possible, beneficiaries – are empowered and encouraged to work together and participate in decision-making.
- Increased time and space for reflection to support collaboration, creativity and experimentation.
- Better information flows which disseminate good practice and new ideas throughout an organisation and across networks.

Alongside these expected benefits, organisations are likely to experience a number of challenges (Garavan 1999; Whitbeck 2014; Aikin et al 1997; Senge 1990; Thomas and Allen 2006):

- Implementation can be complicated and demands significant commitment, resources and time.
- Innovations which result from organisational learning may break organisational rules.
- It can be difficult to shift dominant organisational culture and its subcultures: these strongly influence the nature of learning and the way learning occurs or does not occur in organisations.
- Leaders may be reluctant to give staff a voice, fearing they may lose control over outcomes.
- Staff may not want to take part in decision-making processes as they may be distrustful, disengaged or just overburdened with other responsibilities .

Other challenges specific to philanthropy include:

- Working with resource-poor voluntary organisations that struggle to find the time and money to collect meaningful data, reflect, and do the necessary staff retooling in order to change their approach.
- Competing demands faced by voluntary organisations from different funders who want them to collect different kinds of data, explore different evaluative questions, or test different approaches.
- ‘Learning fatigue’ caused by being asked to participate in many different group-learning processes by many different funders.
- Grantee/grant maker power dynamics and incentives to look always like a high performer because of competition for money against other organisations.
- Lack of evaluation capacity and expertise in the sector’s organisations.

Questions for further exploration

- How can organisations ensure they collect and use the most useful data?
- How to synthesise information coming from different sources, to produce a more rounded, holistic view of outcomes/change?
- To what extent do learning activities and practices need to be formalised and systematic?
- What kinds of questions, data and systems are appropriate to support learning in a responsive grant-making context?

- How can organisations overcome time constraints to create space for learning and ensure it is used strategically?
- How can the need for accountability through monitoring be balanced with ensuring enough space for grantees to learn and adapt?
- To what extent, and how, can grant makers facilitate learning and peer support amongst funded partners?

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