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UNIVERSITY OF SAN FRANCISCO

CHANGE THE WORLD FROM HERE

**Growth Begins from Within:
How Internal Transparency Influences Organizational Learning**

by

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Capstone Research Report Submitted in Partial Fulfillment
of the Requirements for the
Master of Nonprofit Administration Degree
in the School of Management
directed by Dr. Marco Tavanti

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Abstract

Ample research exists that focuses on organizational learning in the context of program efficiency and outcomes, and organizational transparency in the context of governance and compliance. The purpose of this research is to further explore the relationship between organizational learning culture and the commitment to internal transparency, specifically pertaining to the internal members across multiple levels of an organization. This paper includes a literary review of previous research, an outline for the methodology used for this research, qualitative data analysis of 10 expert interviews, a discussion of the results and findings, and the exploration of present and future implications and recommendations. The resulting themes that emerged from the research include: a disconnected perception between executive leadership and non-managerial members regarding transparency and organizational learning, the inconsistent practice for accountability across multiple organizational levels, and the inconsistent shifts for prioritization that impede stable cultural growth. From these findings, an outline model is adapted for incorporating internal transparency into the development of organizational learning culture.

Keywords: organizational learning, learning organization, organizational transparency, internal transparency, learning culture, internal organizational transparency, nonprofit learning

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Section 1. Introduction

The topic of organizational learning has been a steady topic for research over the past forty years. It originally began as a concept for private, for-profit companies to boost productivity and innovation. Organizations in the nonprofit sector have since readily adapted to leverage organizational learning as a means to maximize outcomes and further their social missions. Milway and Saxton (2011) state that organizational learning is “the intentional practice of collecting information, reflecting on it, and sharing the findings, to improve the performance of an organization” (p. 44). This definition mirrors well with the original concept for the term, but experts have expanded this idea to implicate more areas of organizational growth other than performance outcomes. For example, Torres and Preskill (2001) describe organizational learning as “a continuous process of growth and improvement that (a) uses information or feedback about both processes and outcomes (i.e., evaluation findings) to make changes; (b) is integrated with work activities, and within the organization’s infrastructure (e.g., its culture, systems and structures, leadership, and communication mechanisms); and (c) invokes the alignment of values, attitudes, and perceptions among organizational members” (p. 388). As research in the field progresses, additional layers for organizational learning will continue to expand and grow to include cross-sectoral and societal implications.

Regarding organizational transparency, Hale (2013) describes it as “a continuous flow of information from an organization to the public about the organization’s mission, financial situation, and governance” (BoardSource 2010: 366, as cited in Hale, 2013, p. 32). Within the context of internal organizational transparency, the “public” in this definition refers to the internal members of an organization. This would include board members, executive leaders, staff members, volunteers, and any other agents that operate within the organization to pursue its mission. However, there is a lack of specific research related to the topic of internal transparency that currently exists. The nonprofit sector has heavily led this field of study in the context of external transparency, and there are current examples of different models and frameworks surrounding organizational communication theory. Yet the term “internal organizational transparency” has yet to find a specific space in the field of scientific research and field application.

This project aims to understand how nonprofit organizations view transparency through the lenses of internal successes and short fallings, and how this influences organizational learning and growth. It also examines how organizations are practicing transparency regarding their internal success and short fallings, how organizations are being held accountable to internal transparency, if transparency impacts the implementation of organizational learning systems, and if nonprofit organizations are utilizing internal transparency to strengthen internal successes and overcome internal short fallings.

Through a literary review of previous research and a qualitative analysis of expert interviews, several congruent findings emerged between transparency and the structures for building learning organizations. The major themes identified from this study are: 1) how different members interpret transparency and learning at different levels of an organization, 2) how organizational structures impact the formality and accountability for learning, and 3) the effectiveness and prioritization for formalizing learning structures and supports based on internal and external situational needs. A proposed learning framework is adapted to incorporate transparency from previous research models, with outlines for how organizations can include internal transparency practices to build a learning organization. The results conclude key implications for the future of organizational learning in the nonprofit sector, as well as the potential for additional research on the impacts of internal organizational transparency.

Section 2: Literature Review

History of Organizational Learning Research

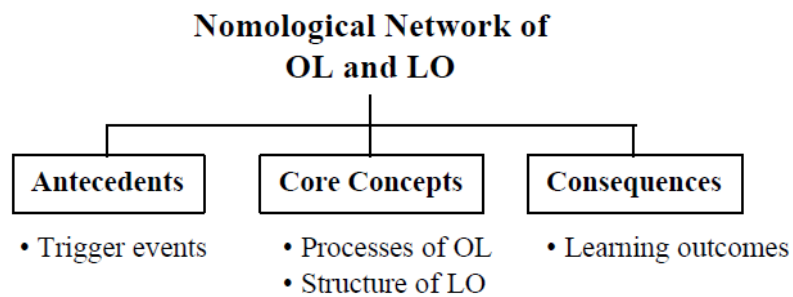
The concepts for organizational learning and learning organizations were originally proposed in Argyris and Schön's *Organizational Learning: A Theory of Action Perspective* (1978), which began gaining more attraction in the field by the 1990s (Rebelo & Gomes, 2008). Since then, significant research and evidence have shown that organizational learning practices and overall organizational performance have a positive correlation. This is true for both financial and non-financial/operational performance (Som et al., 2010). Due to the structure of learning organizations, nonprofit learning and positive performance can still be achieved with minimal resources, so long as the organization has a low debt ratio (McHargue, 2003). This has led nonprofit leaders to start recognizing the topic of learning as being a key component in successful organizations, and that it is quickly becoming essential to adapt to the changing environment (Rebelo & Gomes, 2008).

In Peter Senge's *The Fifth Discipline: The Art and Practice of The Learning Organization* (1990), he defined learning organizations as "organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together" (as cited in Senge, 2001, p. 3). His outline of the five basic disciplines is what sets learning organizations apart from more traditional organization models. These disciplines are: systems thinking, personal mastery, mental models, building shared vision, and team learning. Each core discipline was studied and can be approached at one of three levels: 1) Practices: what you do, 2) Principles: guiding ideas and insights, and 3) Essences: the state of being those with high levels of mastery in the discipline (Senge, 1990: 373, as cited in Senge, 2001, p. 6). Senge argues that organizations may encounter each discipline at varying levels, with room to advance to the next level as the collective knowledge and behaviors of the organization advance as well. Through continued research into the field of organizational learning theories, models were created to help understand and materialize the theories and ideas set forth by previous researchers such as Senge.

Structural Frameworks and Models: Ang & Joseph (1996)

In reviewing a structural framework for organizational learning, the contributions from Ang & Joseph's 1996 study introduce several foundational concepts that later support future research and practice into the field. Their model of the Nomological Network of Organizational Learning and Learning Organizations (Figure 1) combines the theories and findings from past literature and serves as a guiding framework for additional exploration and testing.

Figure 1: Nomological Network of Organizational Learning (OL) and Learning Organizations (LO)



Note. Model from “Organizational Learning and Learning Organizations: Trigger Events, Processes, and Structures,” from S. Ang and D. Joseph, 1996, *Academy of Management Meetings*, p. 3.

It is important to highlight the separate concepts introduced in Ang & Joseph's model regarding organizational learning (OL) and learning organization (LO). The authors note, “The phrase ‘organizational learning’ suggests emphasis on process: a sequence of activities in which an organization undertakes to learn. In contrast, ‘learning organization’ emphasizes unique structural characteristics of an organization that has the ability to learn” (Ang & Joseph, 1996, p. 3). In addition, their nomological network explores the antecedent factors that initiate organizational learning to occur and the learning outcomes that result from the learning processes and structures.

Antecedents

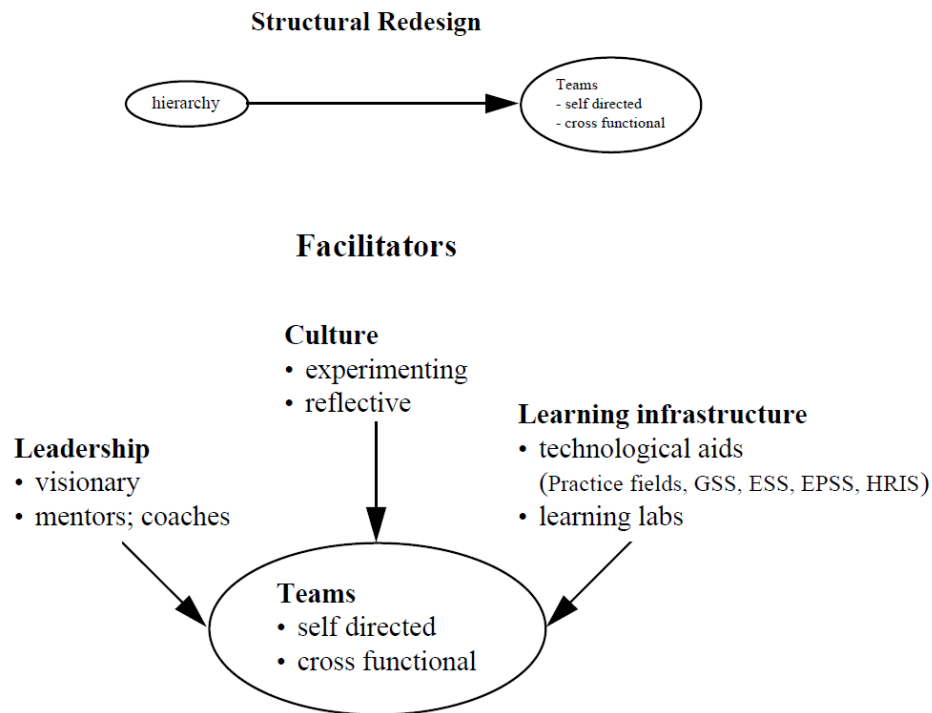
Watkins and Marsick state that organizations learn only when the need arises or when some events trigger off the need to learn. In Ang & Joseph's (1996) research, external trigger factors were identified to be more present in stimulating organizational learning compared to internal

factors (65.9% vs. 34.1%). These external trigger factors include issues with the business environment (unstable markets, rapidly changing customer demands), the technological environment (rapid technological changes), the economic environment (globalization recessionary pressures, economic reforms), and the ecological & political environments (new “green” legislation, crises, political changes). The internal trigger factors include issues with human resources (executive succession, expatriation, personnel turnover), implementation (IT, total quality management, R&D), and inter-organizational relations (joint ventures, diversification, strategic alliances) (Ang & Joseph, 1996).

Core concepts

In reviewing the core processes and structures, prior research also argued for the team-based organization model as possessing more avenues for promoting organizational learning compared to a traditional hierarchical-based model (Ang & Joseph, 1996). The goal of this team-based model is to provide more agency for self-direction and cross-functionality in creating, acquiring, and transferring knowledge within the organization. As new information flows more readily across channels, new insights and behaviors begin to emerge, which is a sign that learning is taking place (Garvin, 1993). In addition to the removal of rigid bureaucratic systems within a hierarchical-based organization, several facilitators also play a role in building a team-based organizational learning model. These include leadership, culture, and learning infrastructure (Figure 2).

Figure 2: Structure of Learning Organizations



Note. Model from “Organizational Learning and Learning Organizations: Trigger Events, Processes, and Structures,” from S. Ang and D. Joseph, 1996, *Academy of Management Meetings*, p. 12.

McHargue (2003) states that “NPOs need to embrace the idea of building teams and encouraging collaboration not only within the organization and with volunteers but also with other NPOs, stakeholders, and society as a whole” (p. 203). The benefits from accessing learning and information across different partners and stakeholders would allow members to invite more diverse and inclusive opinions and ideas into the conversations, further developing their learning. Also without a formal gatekeeper of information, team members can find more self-agency to both seek out the information themselves and/or more openly share information with others.

Leadership

As with any institutional structure, investment and participation from top executive leaders is key to implementing systemic change. In providing visionary leadership and organizational/individual support, participants will have room to engage in the organizational learning structure and nurture its growth. Where all members of management also contribute to

organizational learning is through modeling learning for direct reports and other employees, for example as mentors or coaches. Personal investment in employee growth not only supports the implementation of innovations and improves program outcomes but also attributes to addressing work sustainability and personnel turnover; both of which are also examples of internal antecedent triggers for organizational change. Garrido & Camarero (2009) state, “The commitment to learn is closely linked to a managerial commitment to support a culture which promotes organizational learning as one of its core values” (p. 218). This means that this culture of learning should not be restricted to the responsibilities of individual managers, but it should be a part of the larger organizational culture.

Culture

In addition to responding to external environmental factors, true learning culture must also be reflected internally. Members must be able to engage critically and problem-solve to be innovative and promote sustainable change without the fear of negative consequences. Garrido & Camarero’s research also notes, “An open mind involves questioning preconceived ideas or assumptions that shape the acts of the organization’s members, thus enabling the incorporation of new ideas and points of view and aiding lifelong learning” (2009, p. 218). This culture of openness also allows for members to engage in more honest reflection and collaboration, such as providing and receiving feedback without criticism or judgment. This sentiment of culture adaption also highly mirrors the foundation for building organizational transparency, both among working members and as a cultural footprint for the organization as a whole.

Learning infrastructure

Supportive technical tools and systems are also necessary for promoting member participation and engagement in organizational learning. Cohen and Austin (1994) “emphasizes heavily on investing in creating learning infrastructures: technological tools, practice fields, and learning laboratories to promote active research, dialog, experimentation and learning within organizations” (as cited in Ang & Joseph, 1996, p. 13). From employee performance to human resource systems, the tracking and processing for both skills- and competency-based growth and training for members can help both individual and organizational development. Where the field has evolved in the last 30+ years is the integration of more social-emotional and interpersonal

communication and mental health advocacy. For example, formal learning infrastructures have begun branching out to invite more inclusive learning models for members (i.e. onboarding, virtual learning, mentoring/coaching, etc.), as well as invest in promoting physical, mental, and emotional safety in the workplace (i.e. self-care advocacy, diversity-equity-inclusion, etc.). Paton et al. (2007) argue, “Coherent development programs with structured progressions are needed..., ensuring that support for role- and career-relevant learning is available at each point and that it builds on what has gone before. There also needs to be more emphasis on more informal opportunities both within the workplace and across different professional or vocational communities of practice” (p. 160S). The inclusion of differentiated learning and systemized learning tracks for employees are both examples of how organizations can continue to invest in their people as well as their programs and services. Upward mobility and career pathways for employees can not only strengthen the learning culture of an organization and combat employee turnover, but it can also provide opportunities for individuals from systemically under-invited groups to enter more senior leadership positions; creating a more diverse and inclusive organizational overall.

Consequences

Ang and Joseph’s nomological network culminates these efforts to identify three main learning outcomes for organizations: competitiveness, organizational survival, and negative tradeoffs. Not surprisingly, strong learning organizations have shown to be both highly competitive and sustainable. The ability to reflect and strategize on product/program improvements not only allows learning organizations to develop new, innovative solutions more steadily but also provides stronger predictability power over trends and potential barriers. This adaptability is also critical for organizational longevity and sustainability. This allows learning organizations to be strategic and analytical about navigating through external challenges/threats, as well as constantly improve internal systems to be diverse and inclusive to the changing needs of the organization and environment.

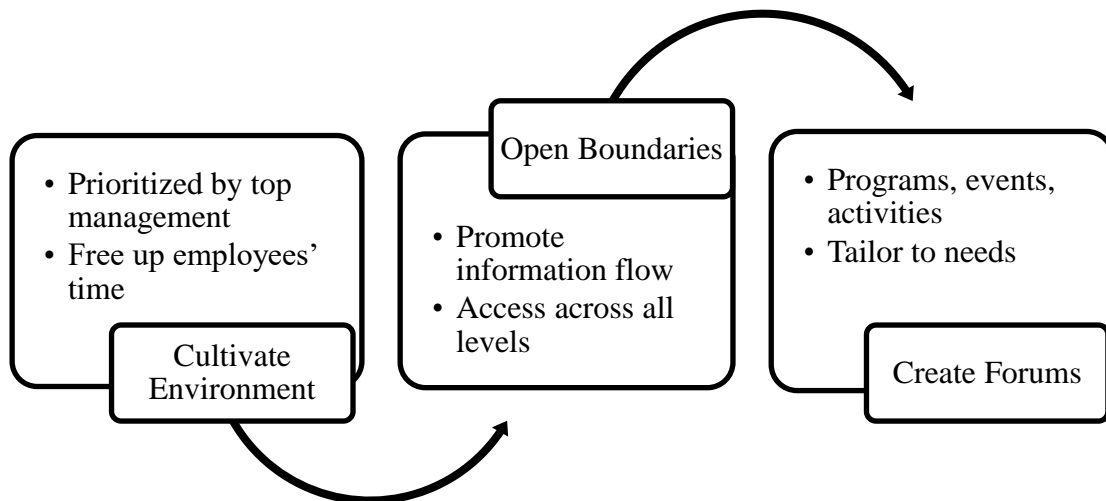
Ang & Joseph also found several negative outcomes in their nomological model. These include inefficient learning experiences, setbacks from insufficient resources, and the tradeoff costs between team-based and hierarchical-based organizations. Although all these outcomes are

consequential to any organizational learning model, these can be especially exasperated for nonprofits. Therefore, to imbed all these facilitators into a structural design requires the purposeful dedication of time and resources; both of which can be limiting for nonprofit organizations. In this way, developing organizational learning structures and practices can come with the tradeoff cost of pausing or limiting the external expansion of programs and services. Nonprofit organizations must consider how this will not only impact their clients and service partners, but also the financial priorities and relations with existing partnerships and donors.

Structural Frameworks and Models: Garvin (1993)

This next model is extracted from the findings from David A. Garvin’s 1993 research on how to build up a learning organization (Figure 3). Garvin’s (1993) research centered on knowledge transference within organizations; tracking efficiency, impact, and processes. From his findings and building off previous researched works, Garvin’s format for building a learning organization outline specific phases for institutions to prioritize and take simple steps towards. This more tangible approach lends itself very closely to Ang and Joseph’s nomological network model as well; providing more concrete examples and best practices for supporting organizational learning culture.

Figure 3: First Steps for Building Learning Organizations



Note. Model created from information from “Building a Learning Organization,” from D. A. Garvin, 1993, *Harvard Business Review*, p. 25-27.

Much like Ang & Joseph’s model (Figure 2), Garvin names the cultivation of the environment as the first step in building a learning organization, citing upper/executive management support and time as primary contributing factors. He states, “Only if top management explicitly frees up employees’ time for the purpose does learning occur with any frequency” (1993, p. 25). He argues for the investment in time now will yield future benefits in increased productivity from employees who have gained more experiential essential skills through their learning.

Garvin also advocates for removing barriers from segregated levels/teams and promote more cross-sectional learning and collaboration. Whether through C-suite leaders to customers and suppliers, opening “boundaryless” channels will help stimulate more diverse ideas and perspectives across the organization, which can lead to increased innovation and productivity (Garvin, 1993).

The last stage Garvin proposes is creating learning forums; formalized learning spaces “designed with explicit learning goals in mind,” and “each of these activities fosters learning by requiring employees to wrestle with new knowledge and consider its implications” (Garvin, 1993, p. 26). These forums can be tailored to the needs of the organization, and they can incorporate various avenues and topics. How these three stages work together to remove barriers that impede organizational learning will help move organizations closer to achieving their social mission. The goal for this transformative shift is to move towards a culture that is centered on the commitment to learn and develop its people, rather than using learning as a strategy only towards improvement (Garvin, 1993). This juxtaposition is also mirrored in Ang and Joseph’s model, where commitment to learning may require an organization to slow down or pause its expansion of programs or services.

Garvin later partnered with Edmondson and Gino (2008) to expand upon Garvin’s initial research model through an assessment toolkit, where it highlights three building blocks of a learning organization to follow (Figure 4). Each building block correlates with and expands upon Garvin’s previous model to include distinct characteristics and opportunities that organizations

can strive towards if they wish to develop in a specific area. The toolkit was published in *Harvard Business Review* alongside a Learning Organization Survey to determine how well a team or organization is performing in each block category. Given the multifaceted nature and nuances that make up each organization, the toolkit attempts to pinpoint opportunities for growth in each area with suggested items to work on. This gives flexibility to organizations and leaders who are working to build up their learning organizations but may only have the capacity to take on one or two target areas at a time.

Figure 4: Understand the Three Building Blocks of a Learning Organization

Understand the Three Building Blocks of a Learning Organization

Building Block	Distinguishing Characteristics	Example
A supportive learning environment	<p>Employees:</p> <ul style="list-style-type: none"> • Feel safe disagreeing with others, asking naive questions, owning up to mistakes, and presenting minority viewpoints • Recognize the value of opposing ideas • Take risks and explore the unknown • Take time to review organizational processes 	Children's Hospital and Clinics in Minnesota instituted a new policy of "blameless reporting." The policy replaced threatening terms ("errors," "investigations") with less emotionally laden ones ("accidents," "analysis"). People began identifying and reporting risks without fear of blame. And the number of preventable deaths and illnesses decreased.
Concrete learning processes	<p>A team or company has formal processes for:</p> <ul style="list-style-type: none"> • Generating, collecting, interpreting, and disseminating information • Experimenting with new offerings • Gathering intelligence on competitors, customers, and technological trends • Identifying and solving problems • Developing employees' skills 	Through its After Action Review process, the U.S. Army conducts a systematic debriefing after every mission, project, or critical activity. Participants ask, "What did we set out to do?" "What actually happened?" "Why?" and "What do we do next time?" Lessons move quickly up and down the chain of command and laterally through websites. Results are codified.
Leadership that reinforces learning	<p>The organization's leaders:</p> <ul style="list-style-type: none"> • Demonstrate willingness to entertain alternative viewpoints • Signal the importance of spending time on problem identification, knowledge transfer, and reflection • Engage in active questioning and listening 	Harvey Golub, former CEO of American Express, challenged managers to think creatively by asking them questions such as, "What alternatives have you considered?" and "What are your premises?" His questions generated the open-minded discussion crucial to learning.

Note. Figure from "Is Yours a Learning Organization?", from D. A. Garvin, A. C. Edmonson, and F. Gino, 2008, *Harvard Business Review*, 86(3), 109, p. 1.

Challenges to Previous Models

In the previously mentioned toolkit by Garvin et al. (2008), it also presents the inert challenges and considerations that organizations must be aware of when transitioning into a learning organization. First, organizations must recognize that the responsibility for culture change must go beyond leadership. Although leadership may seem like the appropriate response to many organizational initiatives, developing a culture of organizational learning requires more than modifying leadership behavior. Research shows that scoring high in leadership still left the other two building blocks under-resourced, which is something organizational leaders should keep in mind when investing time and resources into developing other areas of focus (Garvin et al., 2008).

Next, leaders must be adaptive to the nuances and diversity of needs when building a learning organization. Each department in an organization is different, and even large organizations have great diversity within groups and teams with different affinities to learning. Recognizing and being sensitive to these differences will allow for managers and employees to find more common ground in approaching obstacles and learning from those opportunities together. Learning should not be a one-size-fits-all model, and neither should building a learning organization.

Also, organizations should analyze their ‘successes’ or ‘failures’ in any particular area objectively by critically comparing themselves to outside benchmark data. Biased opinions may cloud an organization to being successful in one area, even though this may not be the case. Survey results indicate that some domains that organizations self-identified as areas of strength were actually below the competitive average. This is not to suggest that scores are universally trackable or comparable, but they should always be analyzed critically in comparison to benchmark data, if applicable. For example, if an organization boasts high staff training for programmatic outcomes, it should continue to strive towards other avenues to continue its journey of learning, such as investing in training content for organizational or personal development. This ties back into Garvin’s initial argument for learning organizations: that the goal for learning should be to develop its people, not simply to improve outcomes or sales.

Lastly, for Garvin et al.'s toolkit, organizational learning and learning topics are multi-layered and multidimensional, which means there is no one clear way for organizations to develop in any specific area or topic. This flexibility allows for organizations to focus on their specific needs, and leaders and managers should be cognizant and thoughtful on how to promote the broadest level of change. For improving the learning environment, for example, an organization may want to focus on psychological safety and another time on self-reflection. The challenge lies with leaders and managers to understand the needs of the people they lead, and to think about structural/situational learning barriers in a different way.

One final challenge that applies to both learning models discussed is the issue of time. In researching specific challenges with organizational learning, Milway and Saxton (2011) found that “98 percent of nonprofit organizations reported...that they collected a lot of information, [but] a third of them said that they were unable to reflect on it and integrate it in a meaningful way into program activities” (p. 46). Intentionality surrounding data collection is a vigorous first step, but it does pose a challenge when limited time is allotted for the teams to analyze the data effectively. This is why Milway and Saxton argue for organizations to invest in two key areas: reflection and information sharing. Reflection will allow organization leaders to identify the gap areas in the learning cycle (goals gap, incentives gap, process gap) and find strategic solutions to address these gaps. Once identified, the authors outline the importance of knowledge-sharing to catalyze resources and collaborate with other supports to build capacity. Much like how teachers collaborate to share ideas and lessons all based around the same curriculum, staff members can engage in peer- and community learning. Rewarding knowledge capture and sharing through incentives is key for promoting this model sustainably. This empowers members of the organization to engage with the learning of others and promotes collaboration and connections as well (Milway & Saxton, 2011).

Organizational Transparency

Through reviewing the research history of organizational learning, it is evident that it shares themes with organizational transparency – specifically with building a culture of trust. Hale (2013) states, “Transparency is intertwined with central nonprofit sector values of trust and collaboration. Transparency of information and practice fosters connectivity between nonprofits

and their stakeholders, and the broader public. This trust evolves over time through patterns of engagement between organizations and individuals” (p. 32). With internal organizational transparency, this level of trust exists between the members and internal stakeholders of an organization, such as board members, executive leaders, staff, and volunteers.

Winkler and Fyffe (2016) wrote about learning culture moving “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” (p. 3). For an operational- or program evaluation to provide meaningful data, organizations must be honest and transparent about the successes and challenges that they face. Within the context of internal transparency, this data analysis could take the form of employee engagement surveys, managerial feedback sessions, etc. Referring back to Garrido & Camarero’s research on cultural openness and acceptance, members must feel comfortable to inquire and push back in order for honest conversations and innovative thinking to take place. That level of honesty does tie back to organizational transparency, and the openness to have those conversations may start from the executive leadership level. If managers are willing to seek out alternate opinions and encourage questions and push back on initiatives or ideas, then that level of transparency opens the door for true inclusivity in building an organizational learning culture.

“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” – Mario Morino, Morino Institute (as cited in Winkler & Fyffe, 2016, p. 4).

Transparency and its Limitations

Organizational transparency shares a very extensive background with the nonprofit sector, most commonly within the context of governance and compliance. The Form 990 and local state registration laws are just two examples of federal systems that enforce compliance through transparency, while other methods such as public annual reports and website information are utilized to promote good faith with donors and the general public. However, the case for increased research and development in this field is still highly necessary – specifically in the

context of internal organizational transparency. “New refinements to Form 990 may provide additional information that the broader public is seeking, but it does not seem likely that Form 990 alone can substitute for the use of informal methods of communication directly at building trust and fostering collaboration” (Hale, 2013, p. 44). This is especially true for internal organizational transparency, as internal members may not view Form 990 as a tool for building trust between them and the organizations they work with. Also, because this is a federal tax document, the general public may not be well-versed or aware of how to extract the information or interpret this document. As government and local regulations are incomplete, the urgency for prioritizing internal transparency lies with the culture-keepers and managerial leaders of the organizations; with no formal oversight or accountability system.

Sustainability through Culture Shifts

With any systemic culture shift, organizations will experience different transition phases and corresponding challenges. Perkins et al.’s (2007) research highlight the differences between individual/group level changes and organizational/community-level changes in relation to transitioning into a learning organization. Their study reveals that organizational learning “change becomes progressively more challenging as one moves from the individual and group or team levels to the organizational and community levels” (Perkins et al., 2007, p. 322). Even though individual behaviors may change under the new culture shift, it becomes more difficult for large-scale change to be sustainable. For example, even if envisioned leaders devote time and resources to promote a culture of learning, systemic considerations must be set in place to ensure that learning is fully embedded in the organizational culture. Because this takes time, this would also explain why transformational change is least common in nonprofit organizations (Perkins et al., 2007).

Another argument is that because external triggers are the most common stimulant for learning to occur, organizations only engage in learning to respond or adapt to the external variable. Once that external variable no longer impacts the organization’s focus, the culture of learning is abandoned to return to the previous point of homeostasis. Senge describes this term as “survival learning,” or “adaptive learning.” He states that although it is sometimes necessary, learning organizations must merge “adaptive learning” with “generative learning,” which is

“learning that enhances our capacity to create” (Senge, 1990: 14, as cited in Senge, 2001, p. 4). Generative learning is continual and explorative, which also challenges organizations to think strategically about preparing for internal/external trigger variables in the future.

In Serrat’s (2017) learning organization model, it highlights several subsystems that attribute to the success and sustainability of organizational learning culture: organization, people, knowledge, and technology. Serrat proposes that for organizational learning culture to be sustainable, all four pillars must receive specialized attention and development within the areas of learning and growth. For example, organizations should invest in holistic organizational learning strategies, personal staff development activities, knowledge transfer systems, and creative communications technology. These strategies can not only keep organizations actively targeting specific learning needs, but they also provide stability and unity across all areas of the organization.

Lastly, Umar and Hassan’s (2018) research examined the importance of data collection in supporting organizational learning. “The impact of organizational support for learning is stronger in nonprofits with higher internal capacity for conducting performance assessment and clear goals and objectives, and that it is weaker in nonprofits with limited capacity and unclear goals” (Umar & Hassan, 2018, p. 1078-1079). While the authors provide various insightful recommendations on how to engage this issue, one new avenue for support that they mention is the involvement of the governing board. If staff and leadership capacity is tied, Umar and Hassan propose this as an opportunity for board members to play an important role in shaping the organization’s direction and goals towards organizational learning (2018). This is also an opportunity for board members to connect with employees to understand the current cultural climate of the organization and invite consultants to help inform the strategic planning process. With clear goals and performance metrics, employees can not only have a clearer understanding of where the organization is headed, but they can have a transparent view of how members of the board assess initiatives that may shape their employee experiences in their organization.

Section 3: Methods and Approaches

This project was conducted through a qualitative research approach. Qualitative data was collected through semi-structured interviews with nonprofit leaders and content experts on organizational learning and development. This was a practical action research project that outlines how to incorporate internal transparency strategies to support organizational learning. Interview participants were collected through purposive and snowball sampling methods. Participants were selected based on their primary role as nonprofit professionals and partners. To collect a diverse range of perspectives across different levels in an organization, I chose to interview nonprofit board members, executive leaders, staff members, and volunteers. For additional contextual research, I also interviewed two content experts who work in the field of organizational learning and development. The group of interview participants includes two nonprofit board members, one executive director, one senior vice president, one senior staff member, two junior staff members, one volunteer, and two content experts. Four participants held secondary roles in separate organizations, and their responses were also recorded in addition to their initial primary roles. This totals to 10 interview participants, with 14 nonprofit perspectives total.

The 8 interview candidates I reached out to through personal communication channels, while two additional candidates were recommended to participate through snowball sampling. Meeting invitations, a project overview, a request for video and audio recording permissions, and a confidentiality disclosure was sent to participants before the interview. The semi-structured interviews were 45-60 minutes, depending on the responses from interviewees. The semi-structured interview included six initial, open-ended questions based on organizational transparency and organizational learning, with follow-up prompts that asked for further details and clarification. Interviews were conducted virtually through the Zoom meeting platform. Video and audio recordings, along with the captioned transcriptions, were captured with participant permissions and were used solely for transcription purposes. Participant preferences on confidentiality are honored in this report, and the participants will be referenced by their primary role and title. Racial and gender identities were considered when selecting a diverse sampling size, but those demographics will not be included in this report to protect participant

confidentiality. Their organizational sector and tenure history is identified as it related to their primary role and capacity to speak on experiences within their respective organizations. The list of initial open-ended questions is included in Appendix A. Additional information on interview participants is also included below in Appendix B.

Research Question

How do internal successes and short fallings in an organization influence organizational learning culture and growth?

Section 4. Data Analysis

In reporting the results and discussion findings for the data analysis, the participants are grouped based on their primary role in their organizations. Board members and executive leaders are grouped under “Management,” while staff members and volunteers are grouped under “Non-management.” This will provide a more general perspective in identifying trends to compare and contrast between the two groups.

Demographics

This table consists of the demographic information about the interview participants for the qualitative study. To honor participant confidentiality, each participant will be referenced by their primary role and title.

Table 1: Demographics of Interview Participants

Participant	Title (Group)	Org-Sector	Tenure
Board Member 1*	Board Member (Management)	Youth Services	1 year
Board Member 2	Board Member (Management)	Foundation	3 years
Content Expert 1*	Content Expert	Nonprofit	6 years
Content Expert 2	Content Expert	Nonprofit, Private Sector	6 years
Executive Leader 1*	Senior Vice President (Management)	Education	25+ years
Executive Leader 2	Executive Director (Management)	Education	4 years
Staff Member 1	Junior Staff Member (Non-management)	Workforce Development	3 years
Staff Member 2	Junior Staff Member (Non-management)	Education	6 years
Staff Member 3*	Senior Staff Member (Non-management)	Education	3 years
Volunteer 1	Volunteer (Non-management)	For-profit, Nonprofit	3 years

*has a secondary role (Appendix C)

Results

Internal transparency with successes and short fallings

In reviewing how internal successes and short fallings relate to organizational transparency, both groups shared similar methods regarding communication. Both groups experienced utilizing both casual and formal methods of communication when receiving updates regarding their organizations, depending on the situation (i.e. email, direct messages, conversations, etc.). Generally, both groups found transparency regarding successes. However, the groups shared different experiences regarding organizational short fallings.

For the Management group, communication methods and messaging seemed to depend on the severity or urgency of the situation. As upper management, this group also would consult with other leadership members on how to communicate sensitive information. Board Member 1 shared that if “information that is comfortable to be shared publically..., [it] is also shared through social media, group text channels, etc. [But] will keep any short fallings internal [from the public].” Although some members received explicit instructions on who and how to share specific information, they all shared the reasoning behind those decisions, whether it was unrelated to other parties or it was unproductive to the goal of resolving the situation.

The non-management found that communication and transparency sharing felt more formal as the information went up the organizational hierarchy, yet more intentional/customized when going down. There were also ambiguous feelings surrounding “successes/short fallings,” as communication for both can feel inconsistent. The majority of members in this group felt that their organization gave few/no formal communications from upper management regarding important transparency updates, which made members feel not prioritized. This was especially true for short fallings. Staff Member 1 shared that they receive important organizational updates from meetings, but those updates are not shared to staff as a whole. In turn, they are also not receiving important updates that pertain to their job, making it difficult to find stability and maintain faith in C-suite leadership.

Content Expert 2 supported the responses and trends in the Management group, stating that the “scope of the flow of information is at a need-to-know basis for the sake of operational efficiency.” It depends on who needs to know what at what time to get the job done, and that can

impact how information flows and how transparency is perceived. They also shared that highly successful organizations do have high information fluidity and are highly transparent. The growing trend now is for organizations to be transparent on more social topics and issues that do not directly relate to business. This type of transparency is reflective of servant leadership and empathy, which Content Expert 2 states is becoming more necessary in the field.

Accountability and internal transparency

Both groups had different responses to this topic as well. Management members felt that accountability was more structured and streamlined, due to the regulatory meeting cycles and agenda items. Similar to the previous prompts, this group also shared the added context for how certain communication is shared out to which individuals, but none of the participants explicitly mentioned an accountability system that followed up with this practice. Executive Leader 2 shared that their Senior Leadership Team supports them in discussing “at what point do people need to know,” and having conversations on how communication is tiered down the line. Executive Leader 1 mentioned the importance of being actively responsive to urgent needs. For example during the rise of anti-Asian and anti-Semitic hate, they felt it was “important for [the organization] to have courageous conversations” and “productive conflict” with internal members. They spoke about “wrestling with our internal selves,” and transparency helps to prioritize what to wrestle with, as long as it doesn’t cause harm.

The Non-management group shared varying views on accountability, as each perspective was tied to their experience at their organization or individual members. This differs from the Management group experience, where there was no system for accountability on communication. What did come across in this group was that because accountability felt situational/inconsistent, the moments that transparency was shown from leadership, it was noticed and appreciated. This varied from personal check-ins to virtual town-halls with leaders. Staff Member 3 mentioned that “transparency is important, but can make things more difficult.” It can sometimes be hard to balance what you do/don’t share with their immediate teams; weighing pros/cons and looking at potential consequences of sharing.

Promotion of organizational learning

Given the scope of each group's influence, they also had varying responses regarding their views on promoting organizational learning. The Management group all shared similar feelings around identifying learning needs in the organization and leveraging culture pieces that are present. However, the group also mentioned the tension that exists when the initial organizational culture is contradictory to certain elements of learning organizations. This can be from new leaders coming into the existing culture, or former staff rising the ranks and bringing different perspectives to the leadership spaces. Board Member 1's experience with their organization was fairly positive as a regular member, which is why their experience felt contradictory when they joined the governing board. They shared, "This new governing board wasn't fully transitioned well, and organization had to address it... [The incident] wasn't treated as learning, but more like a reprimand." Executive Leader 2 also shared that "when organizational culture shift relies on one individual, then the organization is in crisis," or like a "savior leading to make the change." They stressed the importance of finding people to lead for the long term & to keep the cadence going.

The Non-management group also had varying responses, with some feeling a strong sense of learning culture and others feeling none. Several members did identify that certain agency barriers are in place that do not prioritize learning, and it feels like they need to rely on individual agency to seek out informal learning opportunities themselves (i.e. attending events, having conversations with other staff/departments, etc.). Staff Member 1 stated that they did not engage with the learning culture because they did not feel included or invested in as an employee. Then when they were invited to an inter-departmental meeting, they got to listen and collaborate with others outside of their role, which helped them better understand the organization as a whole. Volunteer 1 also mentioned that there was "no formal onboarding process for volunteer groups," and so it fell to the more active volunteers to speak up and share their personal stories/asking others about their experiences during events.

Content Expert 2 shared that "organizational learning happens organically...at all levels, but is especially critical at higher levels," such as C-suite leaders. Because stakes are higher at higher levels, they claim that leaders either learn through experience or "failing forward," with

less opportunity to grow/learn. For larger nonprofits (100+ people), this can be driven by the “mission.” In speaking about behavior changes, Content Expert 1 asked, “Are people looking for PD opportunities? Do they seek critical conversations/feedback? Are they open to coaching?” They also mentioned that “space needs to be created for learning to happen, and that takes time.” So it is important to be consistent and practice supportive behaviors, especially in the 1:1 spaces (i.e. direct reports managing up, improving engagement). They also noted that change is context-dependent on how to impact culture, and can be external (ex. BLM movement) or internal (ex. departments). They stressed that accountability is important, especially in senior leaders. Nothing will happen if the leaders aren’t practicing behaviors, regardless of time/money spent on initiatives.

Transparency to strengthen successes and overcome short fallings

Both groups did generally agree regarding the inclusion of transparency to improve organizational successes and short fallings. The universal theme is in agreement that a shift towards a learning organization is beneficial overall, but it requires time. For the Management group, participants expressed the desire to have learning show up in a variety of places (recruitment, training, data analysis, partnerships, etc.), and several participants identified the benefits in creating/reinvesting into organizational projects that promote a learning culture. Board Member 2 said that “if it was prioritized, board engagement & knowledge of the organizational mission & vision would be much more accessible” to not only other members but the organizational staff and major donors as well. In speaking about adopting a learning culture, Executive Leader 1 shared that they were “encouraging [ED] to slow-down,” to “build on learning from successes,” and that “slowing down isn’t a failure,” especially when they are now creating new JEDI (justice, equity, diversity, inclusion) practices and a theory of change.

The Non-management group did also express changes in how they would interact with their organization if transparency became more connected to the learning culture of their organizations. Several members reiterated that the inter-departmental are spaces where transparency attributes to their learning, but that it still feels siloed. Staff Member 2 stated their discouragement with the culture of learning due to the lack of differentiated content veteran staff members receive compared to new staff members. Staff Member 1 shared that “when your

organization doesn't gather employees together, it doesn't feel prioritized." Similarly, "not many people are seeing themselves grow into higher positions in the organization" also discourages the motivation to learn and grow in the organization.

Content Experts reinstated how cultural learning and change are highly dependent on the mindset. Content Expert 1 reinforced the idea that transparency and learning are tied to safety, and individuals won't feel invested in their learning or the culture of learning if they don't have the underlying sense of stability and openness to "make mistakes." Content Expert 2 reiterated that "strong leaders and their personal agendas can be the most effective route for change," shortly followed by impending risk or critical mass of the company (30%). They stated that the quickest/most effective ways to influence organizational culture change is either upon strong leadership or impending risk/fear. They mentioned the third potential factor could be employee uprising as a trigger for change, but that method could be slow and not always effective. Examples mentioned included the transition into the pandemic, the Black Lives Matter movement, and example leaders who led organizations through large cultural changes.

Discussion

Disconnected perceptions

Several overarching themes arose from the interviews. The first evident theme involves the disconnection between the Management and Non-management groups regarding transparency and organizational learning. Where the Management group felt more involved and had more formal, consistent structures where transparency was shown or practiced, the Non-management group did not share that experience. This is not surprising, considering how Management-level members do have more direct access to information flow and are more in control of how that information is shared out. What stood out with both groups was the connection to transparency being important to practice, but both groups had different opinions on how that looked like in reality. Whether that was due to the nature of their positions in their organizations, or it could be a biased lens that either Management or Non-management members may hold.

How each group chose to engage in organizational learning was also varied. Management felt like it should be included in all spaces of the organization, but Non-management felt like they weren't getting it from the formal spaces, so they had to turn to informal spaces, often on

their own accord. This was also true with the Volunteer respondent, who shared their similar experience with having a lack of transparency and learning direction from the staff member they were collaborating with. Perhaps this is a natural result of the hierarchical organizational structure.

Inconsistency in accountability and formality

Tying into the next observed trend is the loss of organized formal structures as the hierarchy level decreased, which impacted the perception of accountability and prioritization of transparency and learning. Management members seemed to have set meeting agendas with spaces for open dialogue and collaboration to share transparently. However, when the levels of the organization decreased, that formality slowly faded and became more ambiguous. The Content Expert and the Senior Staff Member named that it is difficult when there is conflicting messaging or emotions surrounding when/how to be transparent to other employees you manage.

The inconsistency for expectations did explain why the Non-management group may not feel prioritized or invested in by leadership in their organizations. The lack of trust translated to the lack of access for honesty, ultimately impeding staff and volunteers to ask from their leaders and learn. Another connection was made when Non-management members shared their appreciation for organized structures that were created that supported transparency and learning. Whether that was a town hall from senior leaders or being invited to collaboration meetings with another department, it seems like those “irregular” instances stand out as opportunities for transparency and learning more than the traditional “regular” spaces for communication. Perhaps if Management members took more opportunities to lift those “unformal” barriers, more transparent sharing and learning could occur more frequently amongst all members.

Situational shifts impeding the prioritization for change

Something the Management and the Non-management groups mentioned was the situational dependency on how transparency was prioritized/not prioritized. When asked how they viewed transparency would impact organizational learning culture, almost every participant agreed on the potential benefits, but it seems like situational factors may steer the priority towards another direction. This trend seemed to show for both groups as well. For example, when a lack of onboarding supports was given to the new Board Member and short falls occurred, the

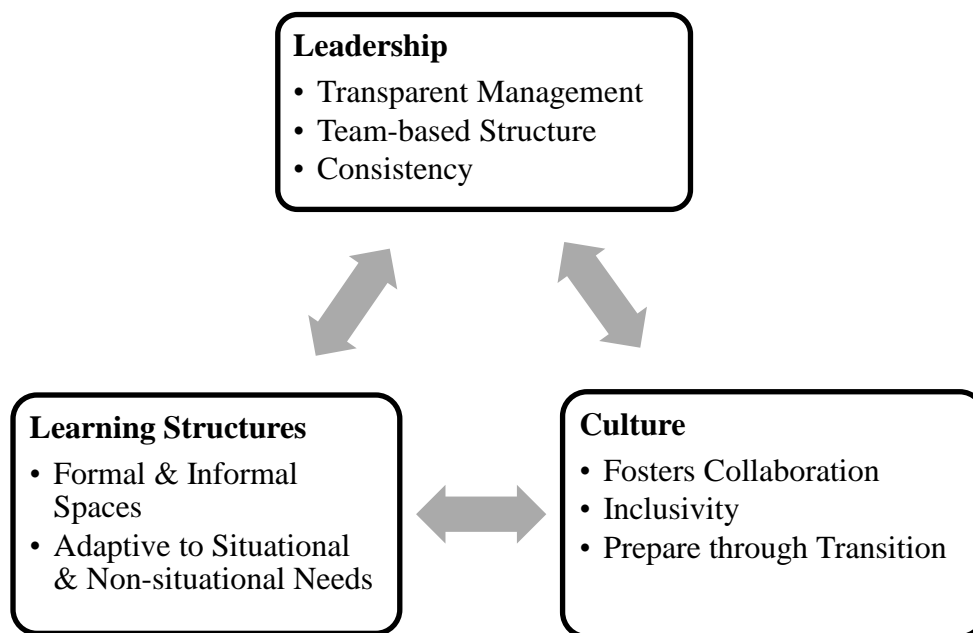
environment felt more harmful than restorative. This trend also tracks with what the Content Expert shared about the higher the leadership level goes, the less room there is for error or learning.

Because culture change takes time, members must be willing and ready to pause/slow down and create space for learning. The pandemic has forced many nonprofits to adapt and change, but this could also be the perfect opportunity for rest and reflect upon the changes and find learning opportunities, because “slowing down isn’t a failure.”

Transparent leadership, culture, and learning structures

Through the analysis of existing literature and the data collected from the qualitative study, the research further reinforces the two foundational learning models from Ang and Joseph (Figure 1) and Garvin (Figure 3). Figure 5 below shows an illustration of how internal organizational transparency supports the different phases for developing a learning organization. This is adapted from both Ang and Joseph and Garvin’s models, with minor adjustments from their original frameworks to specifically address internal transparency. This model can also act as a roadmap for how organizations can specifically work on a distinct area of focus for developing strong transparency and learning culture.

Figure 5: Proposed Organizational Learning Model w/ Transparency



Note. Author's creation. Elaborated from S. Ang, D. Joseph, and D. A. Garvin, 2021.

In congruence with a majority of the research and the collected knowledge from the expert interviews, it is evident the crucial role leadership plays in creating transformative organizational change. In this model, leaders have the influence to target three specific areas regarding internal transparency: 1) transparent management, 2) team-based structure, and 3) consistency.

Transparently lead

Transparent management not only involves leading your staff with transparency, but it can also mean modeling transparency for others. This may involve inviting more diverse voices to join the decision-making process the next time a short falling occurs or seeking out opportunities to practice receiving feedback from direct reports or other employees. Any action that promotes a more transparent response from executive leadership will have ripple effects across the organization as well over time.

Going along with that point, the team-based structure outlined in Ang and Joseph's (1996) model had its own set of strengths and challenges. However, concerning internal

transparency, a team-based structure simply means that information flow should operate more laterally and fluid rather than systemically up and down the hierarchy. Just as Executive Directors have leadership teams to share discussions with, the same should apply to other non-management staff as well. If certain information is classified or sensitive, it is ok to name that to your audience. However following up with office hours to screen questions or building your case for what information you can share are also opportunities to practice transparency with the rest of the organization and build a more uniform sense of “team.”

Also mentioned previously is the importance of consistency. When activities or measures are irregular or inconsistent, they can give off a sense of unimportance or irrelevance. Seeing consistency in leadership is how others can learn to build trust and be open to the cultural shifts that are taking place. Consistent leadership also can attribute to the continued framing and modeling of what priorities are important.

Transparently cultivate

Just as culture shift takes time to take root, smaller behavior changes can support the overall effort for transparent learning. The opportunity for inter-departmental collaboration, for example, could be a way for individuals to engage in expanding their learning while simultaneously working towards the new culture for open and fluid collaboration.

The research and interview participants all say that psychological safety is important and connected with building up a learning culture. When more spaces in an organization allow for more inclusivity, members can slowly feel more open and safe in their environments to share more honestly about their needs and experiences. In this similar vein, activities and systems such as performance reviews or weekly check-ins can feel less punitive or intimidating and more as opportunities for feedback or coaching.

As with any change, there may not always be a smooth transition at first, especially when it comes to cultural change. Shifting towards a learning organization will take time and commitment, and not every person will feel invested in the new changes that come. Practicing humility and transparency is a part of slowing down the process to ask “why”? Questioning new initiatives that don’t make sense right away, or asking leadership to explore different solutions. These all contribute not only to the learning of executive leaders in your organization to think

more critically, but it opens the path towards true organizational learning – when it is ok to push back and it is encouraged to disagree.

Transparently learn

One major trend that was highlighted from the qualitative interviews was the separation between formal and informal learning spaces. Just as the leadership and culture find opportunities to evolve, but so do the learning structures in an organization. Whether they are pre-established or nonexistent, organizational culture change is the ample opportunity to try new ideas and systems. For example, building in a set time at the end of every meeting to debrief can be a systemic opportunity to incorporate transparency in a formal setting. For informal spaces, this could look like inviting different colleagues from the Development team to join the Program team's event. Finding those formal and informal moments can not only promote transparent learning but also promotes a stronger sense of inclusivity and community.

Lastly, it is important for learning structures to be responsive, yet consistent. Tying into the team-based structure under the leadership category, having an adaptive learning structure can include leveraging leadership town halls and office hours to initiate learning. Whether it is creating focus groups to invite different perspectives for a project, or it is starting communal structures like an Equity Council to promote organizational learning and accountability towards DEI initiatives for the organization. Contrary to Ang and Joseph's model, true learning opportunities should not require an existential trigger to promote learning.

Section 5: Implications and Recommendations

Implications

During the COVID-19 pandemic, many nonprofit organizations had to quickly adapt and change to both sustain their operations while simultaneously adjusting to the new world environment. Just as the literature highlights external triggers prompting organizations to participate in organizational learning, so too did the majority of nonprofits in the sector. Similarly, organizations nationwide experienced an additional trigger for change when the Black Lives Matter Movement grew in intensity in response to the murders of Breonna Taylor and George Floyd, and organizations had to quickly learn how to adapt and overtly be anti-racist organizations.

Organizational learning will continue to be an important topic for research and practical field applications. How this research and the resulting model can support this field of study is to view organizational learning through a different lens, organizational transparency. It is evident that learning organizations have shown to be more high-performing and successful, and I am hopeful to see the same correlations apply to highly transparent organizations as well. The investment in organizational transparency should not only serve as a compliancy practice but as an embedded piece of organizational culture.

Recommendations

1. Align executive leadership and board directors on transitioning into a learning organization.

The recommendation falls under the “Leadership” category from the Proposed Organizational Learning Model w/ Transparency (Figure 5). To ensure a solidified commitment to becoming a learning organization, all organizational leaders need to be aligned on the goals and expectations for this cultural change. Involving all members of leadership is also a first step in incorporating concrete learning goals and objectives for the organization to strive towards. What is it you hope to accomplish? What will success look like? How will that success be measured? These are all considerations the executive leadership team and the board should consider.

2. Promote and model unified vision with transparency and consistency – share vision with the entire organization.

The recommendation falls under the “Leadership” category from the Proposed Organizational Learning Model w/ Transparency (Figure 5). If the senior leaders are all aligned on the commitment to become a learning organization, then this allows the Executive Director to model how transparent leadership looks like by sharing this new vision with all members of the organization. This can not only show internal members that this culture change is important and prioritized, but it is also a chance for the leadership to practice the transparency items in the model first-hand (i.e. transparent leadership, team-based structure, and consistency).

3. Promote interdepartmental collaboration and transparency sharing.

The recommendation falls under the “Culture” category from the Proposed Organizational Learning Model w/ Transparency (Figure 5). This is a relatively simple recommendation for any organization to participate in because of the ease of access and applicability. Whether it be intentional collaboration meetings or casual exchanges with members in a different department, creating and promoting these spaces will encourage more fluid information flow and self-directed learning opportunities.

4. Prioritize time to develop transparency and learning projects.

The recommendation falls under the “Learning Structures” category from the Proposed Organizational Learning Model w/ Transparency (Figure 5). As Garvin’s (1993) model suggests, freeing up employee time is a beginning step towards building a learning organization. This time can be utilized for formal learning spaces, such as DEI workshops, or it can be open for informal learning as well, like “Learning lunches” with executive leadership. Whatever the activity may be, the important piece is to make it a priority and open to all.

5. Build consistency and transparency sharing within pre-existing structures – both formal and informal.

The recommendation falls under the “Learning Structures” category from the Proposed Organizational Learning Model w/ Transparency (Figure 5). This is also a simple strategy

to implement, especially with members of your team or department. Also mentioned in the Data Analysis section of this report, but creating a simple, consistent structure in place can help slowly change the organizational culture over time. This can be including time for debriefs at the end of meetings or inviting different members to departmental events or meetings.

Section 6: Conclusion

The continued research and application of organizational learning will continue to be a relevant topic of interest for both the for-profit and nonprofit sectors. With the current landscape today, it is becoming increasingly necessary for institutions to start developing into learning organizations. The literary research supports the argument for how organizational learning and development is connected to increased outcomes, more adaptive to environmental changes, and long-term sustainability. This paper collects the evidentiary support for several organizational models and frameworks to understand how internal transparency influences organizational learning culture and growth. Through a qualitative analysis of several nonprofit professionals and content experts in the field of learning and development, a proposed organizational learning model with considerations for internal transparency was developed. In leveraging internal transparency as a strategy for building sustainable learning environments and organizational culture, the proposed model attempts to positively impact learning outcomes and address challenges that persist from previous learning models.

Limitations from the study came in the form of data analysis and inert challenges from the proposed model. As the qualitative study utilized purposive and snowball sampling, there existed some personal and professional connections between interview candidates and myself as a researcher. As such, our familiarity with each other could have influenced how participants responded to certain questions. For example, several interview participants were former colleagues of mine, and one participant was my former employer as well. It is also noted that the majority of participants in the Management group were more comfortable being named compared to Non-management staff and volunteers. This may have limited the validity of responses from those individuals, and this could also be an inert limitation of the research method. This can be in consideration as the next steps for future research as well.

In addition, there are also inert limitations to the implications of the proposed learning model. As an adapted framework from previous research, the model is subjected to the same challenges and limitations as the original incarnation. This includes the consideration for organizational resources and capacity, its response to trigger events that “induce” certain

organizations to change, the ambiguous definition for learning outcomes, and the systemic limitations between a hierarchical and a team-based organizational structure.

With these considerations, further research in this field can propose new questions and perspectives on this topic.

- How would organizational learning function in different types of nonprofit organizations?
- What is the distinction between how hierarchical organizations build learning systems compared to team-based organizations?
- What further implications does internal transparency have in addition to organizational learning?

The exploration of these and other relevant research questions could mark the next step for more integrated and advanced outlooks on organizational learning and learning organizations. Lastly, additional general research and awareness for internal organizational transparency will also be crucial to explore. Increased awareness and advocacy for internal organizational transparency can lead the nonprofit sector towards a more progressive, transformative future. In addition to compliance and governance, organizations can begin to value transparency as an integral component towards sustainability, transformation, and growth.

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Appendix A: Capstone Expert Interview Questions

- When your organization had its last success (either internal or external), how was information about it shared with “X”?
 - “X” = role category of interview participant: “board members”, “executive leaders”, “staff members”, “volunteers”
- When your organization had its last short falling (either internal or external), how was information about it shared with “X”?
- Describe the systems that your organization has in place for communication internally.
- Describe how your organization encourages/promotes organizational learning. How often do you see “X” engaging in these behaviors? How often do you personally engage in these behaviors?
- If your organization had this focus, how might it impact/change your organization?
- What else would you like to add about these topics?

Appendix B: Expert Interview Participants

To honor the participants from my study who wished to remain anonymous, I have used generic descriptions for all participants in this report. These are the individuals who were comfortable being named as participants for this project: I.H.L., J.P., Anthony Rodriguez, Jacqueline Rosas, Charlie Rose, P.S., L.T., and Gabby Zilkha.

Appendix C: Secondary Roles of Interview Participants

List of participants who identified as having a secondary role that they serve in a separate organization. Their experiences in their secondary role were also collected, and their interview responses were organized according to the group label associated with their secondary role (Management, Non-management).

Participant Primary Role	Secondary Role	Title (Group)	Org-Sector	Tenure
Board Member 1*	Executive Leader	Co-Founder (Management)	Youth Services	3 years
Content Expert 1*	Staff Member	Senior Staff Member (Non-management)	Education	6 years
Executive Leader 1*	Board Member	Board Member (Management)	Education	11 years
Staff Member 3*	Executive Leader	Executive Leader (Management)	Education	4 years

Author's Bio

Wesley Cheung serves as a nonprofit professional seeking to create a positive impact through education, youth development, and community partnerships. After obtaining his B.A. in sociology from the University of California, Riverside, he served two service terms with AmeriCorps in San José, CA. This has led him to dedicate his career to providing strong services and lasting change to underserved communities. Following his 5-year tenure with City Year San José/Silicon Valley as a Senior Program Manager, he has joined the University of San Francisco's School of Management to pursue his Master in Nonprofit Administration and continue his work and leadership in the nonprofit sector.