



THE LABOA PROJECT

RESEARCH REPORT

Presented to Centraide of Greater Montreal

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We would like to begin by acknowledging that this research project took place on unceded Indigenous territory. The Kanien'kehá:ka Nation is recognized as the custodians of the lands and waters on which we have come together to carry out this project. Tiohtià:ke/Montréal is historically known as a gathering place for many First Nations. Today, it is home to a diverse population of Indigenous and other peoples. We respect the continued connections with the past, present and future in our ongoing relationships with Indigenous and other peoples within the Montreal community.¹

The generous contribution of many people and organizations made this project possible. We would like to express our gratitude to all those who agreed to meet with us and share on the topic of learning in organizational settings. Without their input, it would have been impossible to develop an updated, innovative and contextualized model of the learning organization. Thank you for your interest, your expertise, your sometimes critical views on the subject, and above all thank you for taking some of your precious time to meet with us.

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RESEARCH SUMMARY

The LabOA Project

Born of a partnership between the Centre for Community Organizations (COCO) and Centraide of Greater Montreal, the Learning Organizations Laboratory (LabOA) project aims to reflect on the best ways to support and equip community organizations in developing sustainable learning and knowledge sharing capacities. The objectives of the LabOA project are:

1. To define the concept of "learning organization", updating and adapting it to Non Profit Organisations (NPOs) and the contemporary context.
2. To identify the conditions that foster the development of a learning culture and practice within NPOs.
3. To identify the support mechanisms that can be deployed to bolster the learning capacities of organizations supported by Centraide.

The Learning Organization

As a concept, the learning organization (LO) was widely popularized by Peter Senge in his 1990 book, *The Fifth Discipline*, where he defines an LO as an "organization 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 how to learn together." (Senge, 2016: 3). Since the publication of Senge's book, the concept's growth has led to a multitude of definitions and interpretations, making it hard to offer a unified definition of the learning organization. It thus appears that the most useful definition is probably the one that each organization will adopt according to its own organizational context. Therefore, rather than offering an umpteenth definition of the concept, we have tried to identify its main dimensions in an inclusive, contextualized and operational model.

The LO model we put forth is inspired by Anders Örténblad's contributions (2002, 2004). In order to produce a model of the learning organization that is relevant for today's NPOs, the basic construct of his model has been considerably enriched with the field data collected as part of this project. Our proposed model is divided into four dimensions:

- A. An organizational structure that fosters learning:** it contains few formal hierarchical levels and organizes work in teams with a high degree of autonomy.
- B. A climate conducive to learning:** it cultivates a sense of trust and safety, facilitates and values learning, and makes the process enjoyable.
- C. An integrated vision of learning, innovation and work:** it views these three elements as a whole, and considers that transformational learning emanates mainly from informal, practice-based activities, as well as social interaction.
- D. An ability to navigate complexity:** it generates new knowledge and skills, as well as green and sustainable solutions to organizational challenges.

These dimensions are not prescriptive: rather than rigid practices, they can be seen as guiding principles in the creation of LOs. Together, these highly integrated and interdependent dimensions are the foundation of the learning organization.

THE LABOA PROJECT

PROCESS AND METHODOLOGY

The research process behind this document was conducted between February and December 2018, beginning with an extensive literature review. Particular attention was given to the (notably few) resources related to the NPO sector.

This initial literature review was enhanced with a series of twelve interviews with individuals who have a particular perspective on organizational learning or the concept of the learning organization. Working or having worked in the academic, community or social innovation sector, these individuals were selected using a network sampling method. The content of these interviews was subjected to thematic analysis, with a view to bringing out the common, complementary and divergent points of their various interpretations of the learning organization.

Research was also enriched by the collective reflections of the COCo team, research presentations within Ateliers/C workshops, and experimentation with community organizations. In short, the research process was characterized by a constant back-and-forth between literature, individual interviews, personal and collective observations, as well as experimentation and prototyping.

THE LEARNING ORGANIZATION

Despite the widely held belief that the concept of the learning organization (LO) was born during the 1980s and 1990s, the emergence of some of its key concepts can be traced back to the first half of the 20th century. The notion of experiential learning, for instance, was theorized by John Dewey in 1938, while the notion of systems theory was brought to the Macy Conferences between 1946 and 1953. However, it was not until the 1960s that the notion of learning made its way to the world of organizations.

At that time, in the United States as in England, the emergence of new technologies, fiercer international competition and increasingly unpredictable markets were putting great pressure on companies who were consequently looking for new ways to face these challenges, and to protect themselves against those to come. It is no coincidence, then, that the idea of a company that learns and adapts quickly, like a living organism, became highly intriguing. The notion's popularity gave rise to numerous publications in the decades that followed.

Burns and Stalker (1961) set the ball rolling by introducing the concept of organic organizational structure, which, in contrast to the dominant mechanistic structures of the time, was meant to make organizations more flexible and better able to adapt to a changing external environment. The publication of *Beyond the Stable State* by Schön (1971) followed by *Organizational Learning* (1978), a book co-authored by Chris Argyris, signals the first wave of interest in organizational learning in the literature. Finally, while the term "learning organization" first appeared in Garratt's work in 1987, it was Peter Senge who, in 1990, popularized the concept in his bestseller, *The Fifth Discipline: The Art and Practice of the Learning Organization*.

Over the past thirty years or so, Senge's work has given rise to a plethora of interpretations of the learning organization (Örtenblad, 2018; Santa, 2015; Wang and Ahmed, 2002). These interpretations are so numerous and varying that the LO is now described as "mystifying", "ambiguous", and "elusive" (Friedman, Lipshitz, & Popper, 2005), referring to virtually any type of organizational change (Wang & Ahmed, 2002). Several experts on the subject have called for a clarification of the concept (Friedman, Lipshitz and Popper, 2005; Garvin, 1993; Odor, 2018; Örtenblad, 2004). This is precisely what the LabOA project humbly proposes to do.

This said, a review of the literature on the topic shows that, as in any scientific field, some specialists are more frequently cited than others. Their perspectives will hereafter be referred to as *dominant perspectives*.

DOMINANT PERSPECTIVES ON THE LEARNING ORGANIZATION

As previously mentioned, the notion of the learning organization was popularized by Peter Senge as early as 1990, who defined it as "an organization 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 how to learn together." (Senge, 2016: 3). Even today, Senge is by far *the* reference for LOs. Indeed, his name was mentioned in all the interviews we conducted.

Senge is clearly not the only person of interest in this area. Marsick and Watkins (1993), two specialists in adult education, believe that the learning organization is one that continually learns and evolves, where learning is used continuously and strategically, integrated into daily work. Their perspective is of particular interest to us because of their emphasis on informal learning, as well as for the learning organization diagnostic tool they developed (Marsick and Watkins, 2003).

Another popular interpretation of the learning organization comes to us from Pedler, Boydell and Burgoyne (1994), who consider that the "learning company" facilitates the learning of all its members and is continually transforming itself. Their definition is close to Garvin's (1993), according to which the learning organization is qualified to create, acquire and transfer knowledge, and to modify its behaviour accordingly.

While the idea of an exhaustive and universal definition of a learning organization is attractive, the dominant definitions remain rather vague, sometimes even intentionally and blatantly so:

The learning organization is a tentative road map, still indistinct and abstract, a target toward which the organization might aim in order to become generative. It is not a destination, but a perpetual journey. It is part fantasy, part psychology, and part physical challenge. That's why we love it. (Watkins and Golembiewski, 1995: 99)

Needless to say, this ambiguity can cause some confusion. From our literature review and interviews, we can attest to this ourselves. Meanwhile, we believe that this ambiguity opens the door to creative thinking, adaptability and contextualization. In fact, much like other LO scholars,

including Senge (2000: 61), we question the usefulness of a universal definition. This threatens to crystalize the concept, and would probably ignore the particular contexts and ecosystems of organizations. In light of this, we believe that the most useful definition is probably the one that each organization will adopt according to its own reality.

All this said, in order to be distinguishable from other organizational forms, the learning organization must necessarily have certain specific attributes. An alternative way to approach the LO, and the one we chose to prioritize in this research, is to ask what its main attributes, dimensions or key elements might be. The next section proposes to do just that.

THE PILLARS OF THE LEARNING ORGANIZATION

In the previous section, we mentioned that the work of several specialists has led to numerous interpretations of the concept of the learning organization, thereby creating a certain conceptual vagueness. Unsurprisingly, the same is true of the constituent elements of this form of organization. Thus, we find five disciplines of a learning culture in Senge (1990), seven dimensions in the writings of Watkins and Marsick (1993), five activities in the work of Garvin (1990), eleven characteristics according to Pedler, Boydell and Burgoyne (1994), and ten dimensions according to Schein (2004).

These models, however different they may be, all have elements of interest in understanding the learning organization. They are all, in their own way, valid and relevant and share certain key ideas:

- A learning organization is transformed through the continuous learning of its members (Pedler, Boydell, & Burgoyne, 1994; Watkins & Marsick, 1993).
- It creates systems that capture and share learning across the organization (Garvin, 1993; Pedler, Boydell & Burgoyne, 1994; Senge, 2016; Watkins & Marsick, 1993).
- It remains connected to its environment (Garvin, 1993; Pedler, Boydell and Burgoyne, 1994; Watkins and Marsick, 1993).
- Learning takes place at the individual, group/team, organizational (Garvin, 1993; Pedler, Boydell, & Burgoyne, 1994; Senge, 2016) and social (Watkins & Marsick, 1993) levels.
- Learning is rewarded (Pedler, Boydell, & Burgoyne, 1994; Watkins & Marsick, 1993).
- It strongly encourages collaboration (Garvin, 1993; Pedler, Boydell, & Burgoyne, 1994; Senge, 2016; Watkins & Marsick, 1993).

- It allows for error as an opportunity to learn and encourages experimentation (Garvin, 1993; Pedler, Boydell, & Burgoyne, 1994; Senge, 2016; Watkins & Marsick, 1993).
- It encourages systems thinking to solve its problems (Garvin, 1993; Pedler, Boydell, & Burgoyne, 1994; Senge, 2016; Watkins & Marsick, 1993).

Another evidence emerges from our interviews: the themes of innovation, fun, the right to make mistakes, trust, the distribution of power and systemic problem solving are recurring. The community sector is also characterized by particularities such as the importance of non-economic values, the non-financial purpose of learning, democratic governance structures, links with financial partners, citizen participation, the community dimension of learning, and the valuing of tacit knowledge.

Bringing these disparate ideas together to form a digestible model is no easy task. Fortunately, the work of Anders Örténblad (2002, 2004) offers a vision of the learning organization that integrates many of the dominant perspectives' key LO notions, which can then be adapted to different organizational contexts. Indeed, the author calls for his model to be modified to reflect the particularities of the organizational worlds in which an organization must evolve to remain legitimate and relevant (Örténblad, 2015). His functionalist construct can be broken down into four elements (Örténblad, 2002):

Learning at Work	Learning Climate
Learning Structure	Organizational Learning

In our research, we have built our own proposal for the learning organization based on this four-dimensional model. Note that while we retain some of its aspects, we have considerably

modified the content of the four dimensions this model proposes. As the following sections will expose in greater detail, we believe that we have produced a model of the learning organization that is at once digestible, operational, original and adapted to the contemporary NPO environment.

THE LEARNING NPO: AN OVERVIEW OF THE MODEL

A. An Organizational Structure that Fosters Learning

The term *organizational structure* refers to the way people communicate, collaborate, decide and interact within an organization. An organizational structure that fosters learning has the following characteristics:

- Flattened structure
- Work organized in teams
- Low level of horizontal differentiation
- Low level of vertical differentiation
- Low level of behavioural formalization
- Decentralization of power and control
- High level of autonomy for individuals and teams

B. A Climate Conducive to Learning

An organization's climate is a powerful mechanism to support learning. A climate conducive to learning refers to four key elements:

- **Trust and Security:** When they trust each other, members of an organization can be vulnerable, work better as a team, suggest and accept change, experiment, innovate and learn from their mistakes.
- **Fun:** Making learning fun, through play or otherwise, encourages innovation and fuels the desire to learn.
- **Facilitation:** Learning is facilitated by adapting organizational practices to members' learning styles, making various resources available to them and ensuring that learning processes and spaces are varied and accessible to all.
- **Valuing:** Learning is valued by being rewarded in different ways and when its strategic importance is emphasized. The role of leaders is very important here.

C. An Integrated Vision of Learning, Innovation and Work

The learning organization is one in which learning, working and innovating are one and the same, all integrated into the work routine. While it also integrates more traditional learning activities, this perspective considers that transformational learning emanates mainly from less

formal activities based on practice and interaction. In a learning organization, informal learning strategies are therefore the rule, not the exception.

In order to multiply informal learning opportunities, the learning organization sets up learning contexts marked by interaction and practice. A community of practice, which can itself take many forms, embodies the elements of such a context.

D. An Ability to Navigate Complexity

NPOs address complex issues, deal with equally complex organizational challenges, and must also evolve in a changing environment. As such, NPOs must generate new knowledge and find sustainable and innovative solutions to their problems, which is what the LO enables.

Several theoretical frameworks can be mobilized to develop this agility: Senge's systems thinking (2016), Argyris and Schön's loop learning (1978) and Cynefin's complexity theory framework. The latter model is particularly interesting to us because it combines theory and practice in a coherent, pragmatic and intelligible whole. It moreover emphasizes the importance of evaluation as a learning strategy.

THE LEARNING NPO: A FOUR-DIMENSIONAL MODEL

A. AN ORGANIZATIONAL STRUCTURE THAT FOSTERS LEARNING

Mintzberg (1980) defines organizational structure as the **set of ways in which work is divided into distinct tasks in order to achieve coordination**. Structures influence the distribution and layout of communication channels, social interactions among members of the organization, and resources, such as information and knowledge. As a result, the configuration of an organizational structure can strongly hinder or facilitate the learning capacity of an organization and its members.

The structural aspect of the learning organization is recurrent in LO literature. This holds true both for Senge's proposal (1990: 287): "learning organizations will, increasingly, be 'localized' organizations, extending the maximum degree of authority and power as far from the top or corporate center as possible" as well as that of Watkins and Marsick (1993: 258): "the result is a flatter organization and movement away from hierarchy and unnecessary bureaucracy. Information flows freely in the learning organization – among people, across boundaries, and through information and data processing systems."

It is important to mention that our interpretation of a structure that fosters learning does not refer to a strictly predefined organizational chart. First of all, an organogram is a static figure, whereas a learning structure is expected to change at the pace of the organization. Second, we ourselves have observed organizations with vertical, hierarchically-layered organizational charts that, in fact, boast widely distributed decision-making power and multi-level communication. We are convinced that the opposite is also true – so-called horizontal organizations are not exempt from serious communication and power concentration issues. The learning structure therefore refers not so much to an organizational chart, but to the way people communicate, collaborate, decide and interact.

In the following section, we will explore the notion of *organic structure* and two of its declinations (*adhocracy* and *holacracy*) in order to develop the main principles of an organizational structure that fosters learning.

Organic Structure

A structure that fosters learning is flexible and adaptive – it is an organic structure (Hage, 1965). Such structures are low on hierarchy and on task standardization; they tend to decentralize decision-making; to organize its members on the basis of knowledge rather than tasks; and to have non-rigid organizational rules, policies and procedures (Lunenburg, 2012). Because of these particular characteristics, these structures are ideal for performing unusual or complex tasks that often change. They also allow organizations to respond and adapt more quickly to a complex and dynamic environment (Mintzberg, 1982). Finally, organic structures facilitate communication and work across organizational levels and boundaries and thus allow the fluid distribution of knowledge and expertise within the organization (María Martínez-León, Nielsen and Martínez-García, 2011).

In practice, there are innumerable types of organic structural configurations. For the purpose of this research project, we chose to focus our attention on those of *adhocracy* and *holacracy*. Both are highly flexible and adaptable, while supporting innovation and learning.

Adhocracy

Developed by Mintzberg (1982), adhocracy is a structural configuration designed to evolve in a dynamic and complex environment. Bringing together the main characteristics of an organic structure, adhocracy emphasizes grouping people with expertise in various disciplines into project teams, which are themselves formed according to the current needs of the organization. These teams have a high degree of autonomy and can react quickly to changes.

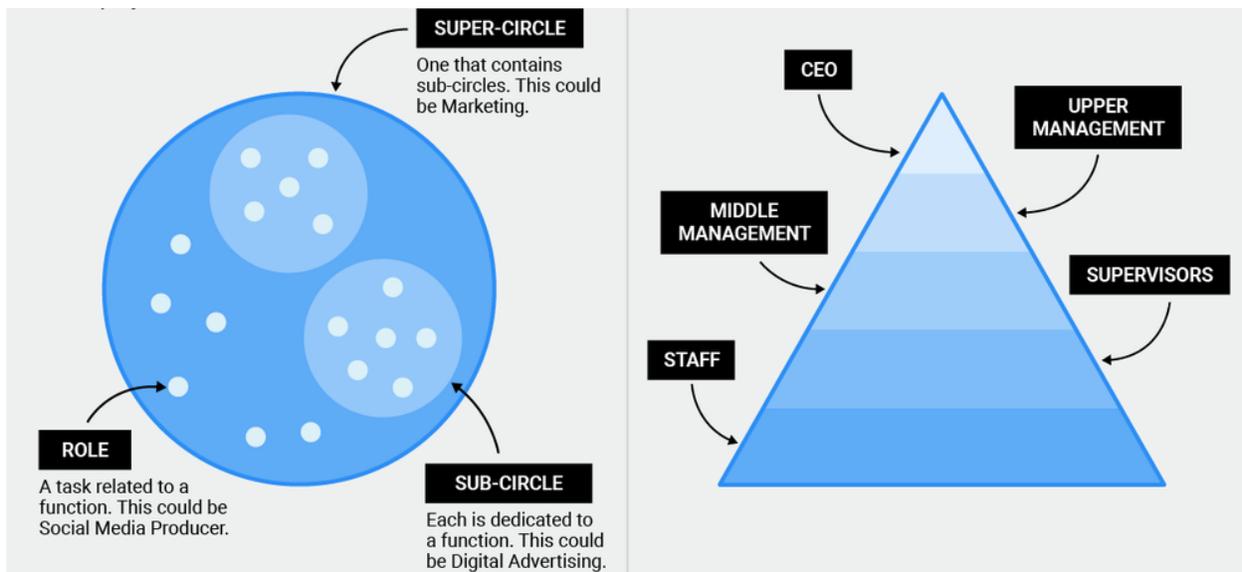
As with communities of practice,² the adhocratic structure does not rely on any form of standardization to coordinate its activities, but rather on mutual adjustment within and between work teams (Mintzberg, 1980). Since adhocratic work is carried out by people with particular knowledge, "information and decision-making processes circulate flexibly and informally where they need to do so to promote innovation" (Mintzberg, 1982: 377).

Holacracy

Developed in 2007 by Brian Robertson, holacracy is an organic structural configuration that relies on a participatory governance process focused on the organization's mission (Robertson *et al.*, 2016). In holacracy, the structure of the organization evolves not in relation to individuals, but in relation to roles that change, are created or modified in order to continually adapt to a

² See the dimension.

dynamic environment (Holacracy, 2015b). The following image briefly compares a holacracy (left) to a traditional hierarchy (right):



"Holacracy vs. Hierarchy", by Calvin Ng (2018)

In a holacracy, authority and decision-making is distributed among circles, teams that form or dissolve as the needs of the organization change (Bernstein, Bunch, & Lee, 2016). These circles essentially constitute the organizational structure. They are, however, nested within a larger structure that they help shape and refine and which takes the form of a constitution (Holacracy, 2015a). This constitution informs how the circles should form and operate, how roles should be identified and assigned, and how the circles should interact with each other.

An Organizational Structure that Fosters Learning (Summary)

The learning organization is based on a structure that fosters learning and innovation. Assuming those of an organic structure, it has the following characteristics:

1. **Flattened structure**, where vertical decision-making is supplanted by horizontal collaboration.
2. **Work organized in teams**, to encourage collaboration and the free exchange of ideas, to ensure organizational flexibility and responsiveness, to support learning by doing and to make learning more enjoyable.

3. **Low level of horizontal differentiation**, based on the specialization of knowledge rather than tasks, where work in multidisciplinary and interdepartmental teams is privileged.
4. **Low level of vertical differentiation**, as a result of the participation of all members in decision-making processes.
5. **Low level of behavioural formalization**, to facilitate informal and multidirectional communication, especially between work teams, management and the Board of Directors.
6. **Decentralization of power and control**, to encourage the active participation of all members of the organization, to promote the adaptability and responsiveness of the organization and to support the creation of a climate of trust and openness.
7. **High level of autonomy**, both for individuals and work teams, so that these entities can self-organize to quickly find innovative solutions to unforeseen situations.

B. A CLIMATE CONDUCIVE TO LEARNING

Defined as "**the shared perceptions of and the meaning attached to the policies, practices, and procedures employees experience and the behaviours they observe getting rewarded and that are supported and expected**" (Schneider, Ehrhart & Macey, 2013: 362), organizational climate is one of the most powerful mechanisms for supporting learning. The importance of a climate conducive to learning was raised repeatedly in our interviews and is an important feature of the LO model proposed by Pedler, Boydell and Burgoyne (1994). Through this research, we have found that the organizational climate of an LO facilitates and values learning, cultivates a sense of trust and security, and makes learning enjoyable.

Trust and Security

An LO builds and nurtures trust among its members.

In an LO, the absence of judgment in the exchange of ideas is normalized.

- Research Collaborator

According to many contributors to this research and LO specialists such as Marsick and Watkins (2003), Garvin (1993) and Senge (1990), learning from mistakes is a key characteristic of the learning organization. Yet, in most organizations, risk-taking and experimentation are associated with some degree of personal risk, and failure or error usually are usually perceived

negatively. In fact, learning is rarely a comfortable process: it means opening oneself up to the possibility of being contradicted or being wrong, revealing one's ignorance, putting one's professional credibility on the line, and risking losing face (Bourgoin and Harvey, 2018). A learning situation is therefore often one of vulnerability.

In our view, a climate of trust and security means **believing and expecting others in one's organization to have positive motives and intentions for their actions**. In short, it represents a shared willingness to accept one's own vulnerability and to welcome the vulnerability of others (Poon, 2003), allowing one to learn from one's mistakes without loss of identity or integrity (Schein, 2004).

In addition, a climate of trust and security facilitates collaborative work and social interaction among colleagues, an essential element of organizational learning.³ It encourages members of an organization to share knowledge freely, to build on each other's knowledge, and to receive and give feedback (Fainshmidt & Frazier, 2017). In fact, a Google-led project on team effectiveness identified psychological safety as a key factor in effectiveness (Google, n.d.).

Pleasure

An LO brings the *pleasure* of learning to life and therefore encourages the *willingness* to learn.

In an LO, learning is fun!

- *Research Collaborator*

It is well known that play is a natural pathway to creativity and learning in children (Piaget, 1951), but play is rarely seen as a legitimate organizational learning strategy. Yet, play has been proven to be an excellent stimulant of creative thinking and a great way to learn (Mainemelis & Ronson, 2006). *Friday Night at the ER* is a good example of an experiential team learning game that simulates and illustrates some of the usual dynamics of a complex system (Wikipedia Contributors, 2018b). Closer to home, COCo makes fidget toys available to workshop participants and the effects on learning are notable: increased engagement and concentration levels, reduced stress and improved communication (COCo, 2016).

³ See the section: *An Integrated Vision of Learning, Innovation and Work*.

Of course, you don't have to play to have fun while learning. Just feeling that you have the right to make mistakes makes the experience of learning so much more enjoyable. Also, learning by doing, with colleagues, is usually more fun – and memorable – than learning in a classroom. In any case, the learning organization cultivates a climate where fun is not only a means to learning, but also an end: the fun that comes from being fulfilled, from increasing one's knowledge, or from contributing to the mission of one's organization.

Facilitation

An LO recognizes the symbolic and emotional power of workplaces, and does not hesitate to change or rearrange space to allow for a change of perspective.

An LO introduces members of the organization to their own learning styles and adapts organizational approaches accordingly.

- Research Collaborator

The learning organization develops and maintains a climate that facilitates learning for all its members by providing them with the resources they need to learn, such as free access to materials, technology, colleagues and contacts, financial resources, and time.

The learning organization also facilitates learning by recognizing that different people have distinct learning styles, such as those identified by Kolb (1984) or Honey and Mumford (1986). It allows its members to discover their preferences and adapts its organizational practices accordingly.

Since most meaningful learning occurs informally and socially,⁴ the LO organizes its work spaces to maximize interaction situations. The spaces are also arranged to reflect the learning preferences of its members: some people prefer solitude and silence, while others benefit from a hectic environment (Gill, 2010). Sometimes, it can also be beneficial to change space: organizing a team meeting in a nearby park or café and leaving the city for a team retreat are all practices that we have observed as beneficial to learning.

In our opinion, it is also important to make the workspace accessible, allowing everyone to be autonomous in their learning and to participate fully in the learning process. In this regard, we

⁴ *Ibid.*

note the value of sensory and communication-related accessibility (Accessibilize Montreal, 2015).

Valorization

Learning is rewarded when: it is valued, it is an organizational and personal priority, it is practiced and shared.

The learning organization clearly allocates and dedicates time to learning on the job, which is a reward in itself.

Successes are openly acknowledged.

- *Research Collaborator*

The learning organization values learning. It views learning as a strategy and an organizational priority, not a luxury. It openly demonstrates its willingness to support the learning of its members, constantly seeking out learning opportunities. The role of leaders and people in positions of power, such as board members, is most crucial here: their support has a significant impact on the willingness to learn of other members in the organization (Nikolova *et al.*, 2016). Moreover, according to Watkins and Marsick (2003), workplace learning approaches that are not supported by leaders who understand the strategic role of learning have a less significant impact on organizational performance.

The climate in an LO also proves that learning is valued by rewarding it. These rewards can take many forms: recognition of its importance, access to additional learning resources, the granting of new mandates or responsibilities, encouragement to share and test new knowledge, etc. In fact, if learning is facilitated, appreciated and fun, it becomes a reward in itself.

Also, allocating time to reflect collectively or individually on one's practice is not only a way of demonstrating that learning is valued, but also fosters the emergence of a more holistic understanding of one's organization and one's role in it.

A Climate Conducive to Learning (Summary)

The climate of an organization can have a very positive influence on learning processes. It can facilitate learning by adapting to its members' preferences, making resources available to them and ensuring that learning processes are accessible to all. It also demonstrates that learning is valued by rewarding it and emphasizing its strategic importance to the organization. In addition,

by cultivating a sense of trust, a climate conducive to learning allows the members of an organization to be vulnerable, to work better as a team, to suggest and accept change, to experiment and innovate, and to do so safely. Finally, by making learning enjoyable, the climate of a learning organization fosters innovation and fuels the desire to learn.

C. AN INTEGRATED VISION OF LEARNING, INNOVATION AND WORK

It is quite common to view learning in the workplace as a way of acquiring the knowledge needed to better fulfill one's role in the organization. From this perspective, learning is seen as both a specific and goal-oriented activity, and learned content is stored in different forms of memories, such as books. As such, the role of the learner is to acquire and store information, facts, and practical knowledge in their own memory so that it may be used in the future.

This vision of learning is tied to the notion of formal learning, which refers to structured and organized, institutionally supported activities that are centred on the classroom model, that are intentional, learner-centred, and that have clear and predetermined learning objectives (Marsick & Watkins, 2001; OECD, 2018). It brings to mind the *banking pedagogy* criticized by Paulo Freire (1983): like a bank with gold in its vaults, the person who teaches owns knowledge. In this framework, teaching and learning involve a *gold* transfer to the students' brains, turning knowledge into information that can be sold, bought and exchanged like any other good, stripped of all context.

We hold a more nuanced perspective on organizational learning. While we believe that so-called formal learning activities certainly have a place in the learning organization, if only to accommodate learning style affinities,⁵ our interviews revealed that meaningful learning is characterized by two elements: it is a social process that occurs between and through people, and it is contextualized by practice.

In this section, we therefore propose to explore what this means and implies for learning organizations.

A Social and Practice-Based Perspective on Organizational Learning

For Wenger (2000), all competencies are culturally and historically defined within a community. The set of skills required to be a sociologist, for instance, is defined by the scientific community,

⁵ See the section: *A Climate Conducive to Learning*.

and this definition has evolved over time. Competencies are also always intimately linked to our personal life experience. All of us therefore have a unique relationship to them.

In some cases, competencies draw on our experiences: when we join a new organization, we feel ignorant, we want to belong, and so we try to align our personal experiences with the competencies defined within this new community. The opposite can also happen: when we return from a training workshop that introduced us to new ways of seeing the world, we return to our workplace hoping to share our experience and open our colleagues' eyes to other possibilities. We may then say that our personal experience draws skills from our community. Learning occurs precisely when these two components – personal experiences and socially defined skills – interact.

Much more than the accumulation of pieces of information that are more or less related to one's work, learning in an organization is to be understood as a process of realignment between socially defined competencies and personal experience (Wenger, 2010). In other words, learning combines personal transformation with an evolution of social structures – learning is a way of taking part in the social world (Gherardi, 1998).

According to this vision of learning, knowledge is equivalent to being able to demonstrate competencies as defined by these communities, within a given cultural and historical context (Wenger, 2000). All knowledge and skills are, therefore, dependent on a context, and it is through practice that this context is transmitted. In other words, it is through meaningful and legitimate participation in organizational practices that people learn, transmit their knowledge and, more importantly, contribute to transforming practices (Gherardi, 2001).

Implications for the Learning Organization

From a pragmatic point of view, our social and practice-based interpretation of organizational learning processes has two major implications for the learning organization. First, within a learning organization, **learning, working and innovating are not necessarily separate activities**. This notion was strongly echoed in our interviews:

A learning organization increases learning opportunities on a daily basis.

Tasks and work are organized so as to be formative, incorporating activities that promote reflexivity and learning.

Learning is integrated into daily activities.

In a learning organization, learning processes are integrated into existing activities.

The learning organization relies primarily on experiential learning to bring learning to life and to ensure that it transforms the learner, as well as their practice.

Second, this social perspective on organizational learning also implies that the main learning unit is not the individual but the collective (Gherardi, 1998, 2001). This means that organizations wishing to foster learning among their members should look at the participation and exchange processes and practices that provide and support appropriate contexts for learning. In other words, rather than looking at the cognitive activities related to learning, **learning organizations ask themselves what forms of interaction provide an appropriate context for learning, and how they can create and maintain them** (Gherardi & Nicolini, 2000; Wenger, 2000). Indeed, as one research collaborator noted: "In an LO, learning is collective. There are many opportunities to meet and work together."

The notion of community of practice is useful in making sense of these theoretical elements, as it allows for the creation of a social interaction context that is rooted in practice and that promotes learning. It should be noted that the community of practice is best understood "less [as] a strategy in itself than a theory of learning that proposes to conceive of learning in terms of social participation" (Lemaire and Sauvageau, 2013: 42).

The Community of Practice

Communities of practice are groups of people who share a concern, a set of problems, or a passion for a topic, and who deepen their knowledge and expertise by interacting on an ongoing basis (Wenger, 2010). It is based on three fundamental characteristics (Douglas Institute, 2013):

- An **area** of knowledge that defines the identity of the community of practice: a topic of common interest that creates common ground, a sense of shared identity, and inspires members to contribute and participate.
- A **community** of people who care about the topic, creating the social fabric of the community of practice: members engage in joint activities, discussions, support each other and share information, which enables them to learn from each other.
- A common **practice**: community members share a repertoire of resources (experiences, stories, tools, documents, solutions to recurring problems, etc.).

Unlike other forms of organizational associations, participation in a community of practice is always voluntary and sometimes spontaneous. Moreover, as in adhocracy,⁶ the members of a

⁶ See the section: *An Organizational Structure that Fosters Learning*.

community of practice decide on the internal operating procedures of their community themselves.

In fact, the community of practice can take various forms (Lemaire and Sauvageau, 2013). Indeed, several research collaborators mentioned that the learning organization uses practices such as learning circles, *lunch and learns* and co-development: all learning strategies that correspond to the principles of a community of practice. Some of these are interdisciplinary and others are more specific to an issue or activity sector. They may also bring together people from the same organization or from several organizations.

An Integrated Vision of Learning, Innovation and Work (Summary)

In a learning organization, learning, working and innovating are one and the same, part and parcel of the daily routine. This vision of organizational learning does not reject all forms of formal learning activities, nor does it deny the relevance of acquiring technological tools to store knowledge and information. It does, however, consider that transformational learning emanates mainly from less structured activities based in practice and interaction. Thus, in a learning organization, informal learning strategies are the rule, not the exception.

In order to multiply informal learning opportunities, the learning organization sets up learning contexts defined by interaction and practice. The theory behind communities of practice, which can take many forms, define this context's attributes.

Finally, we believe that in addition to fostering the creation, sharing and sustainable integration of new knowledge, this social vision of learning recognizes the value of experiential and practice-based knowledge. It therefore aligns itself well with some of the foundations of community action, such as popular education and the empowerment of individuals and communities (Lemaire and Sauvageau, 2013).

D. AN ABILITY TO NAVIGATE COMPLEXITY

Community organizations are inherently exposed to rapid change in an ever-shifting environment. Indeed, they must adapt to the changing realities and needs of the populations they serve and to variations in funding arrangements (CanadaHelps, 2018; IRIS *et al.*, 2013; RIOCM and Locas, 2014).

NPOs, therefore, need to generate new knowledge at an ever-increasing pace to continue to fulfill their mission and, in some cases, to survive. While there is no consensus on the nature of

the concept of the learning organization, all those interviewed for the LabOA project described the LO as having the capacity to find sustainable and innovative solutions to complex problems and thus be able to adapt to change. For some, this means...

- Questioning their practices:

These are organizations that question their practices deeply, especially if they have been around for a long time.

They constantly observe their own work, reflect on their practices.

LO are constantly in search of solutions or different ways of doing things.

- Through self-reflection processes:

It is able to self-assess with lucidity, because it has developed strong self-reflexive capacities.

LOs develop their ability to self-reflect and to navigate complexity.

- Adopting a systemic approach:

LOs have a willingness, but also an ability to question themselves and to read situations and issues with a systemic lens.

The learning organization adopts a systemic vision to address its problems.

LOs adopt strong systemic thinking and perspectives to resolve difficult situations.

They have a propensity to address problems in a systemic way, by which I mean addressing the root of issues.

Senge makes systems thinking the cornerstone on which the other four learning disciplines are anchored. He defines systems thinking as "a conceptual framework, a set of knowledge and tools, [...] to understand phenomena in their entirety and to help us transform them." (Senge, 2016: 7). Similar ideas can be found in the work of other LO theorists:

[Employees] must push beyond obvious symptoms to assess underlying causes, often collecting evidence when conventional wisdom says it is unnecessary. [...] Learning organizations are skilled at [...] systematic problem solving. (Garvin, 1993)

A learning organization is one that has embedded the capacity to adapt or to respond quickly and in novel ways while working to remove barriers to learning. (Marsick and Watkins, 2003: 136)

[...] the learning culture must assume that the world is intrinsically a complex field of interconnected forces in which multiple causation and overdetermination are more likely than linear or simple causes. (Schein, 2004: 406)

Clearly, being able to swiftly perceive internal and external organizational challenges in a holistic manner, to generate new knowledge to address them, and thus adapt or bring about change is an essential dimension of the learning organization – it is perhaps its ultimate

capacity. To clarify this capacity and develop it in an organization, several models can be explored.

Senge and Systems Thinking

We may, of course, choose to side with Peter Senge and his interpretation of systems thinking. Through the development of this discipline and, in particular, of mental models (deeply rooted representations influencing our understanding of the world), we begin "to see phenomena in their entirety, [...] to study interrelations rather than individual elements, to observe processes of change rather than static images" (Senge, 2016: 71). Senge's seminal book (1990) along with his fieldbook (2000) offer several practical tools for developing systems thinking in organizations, a concept that has already proven itself in the field of social change (Stroh, 2015).

Learning Loops

The concept of learning in loops (single, double and *deutero*) developed by Argyris and Schön (1978) may also prove to be very useful in this quest. Single-loop learning occurs when a gap is identified and corrected within normal personal and organizational routines. Double-loop learning, on the other hand, occurs when the values, policies, or organizational and personal goals that have informed our behaviours are challenged. In other words, it invites a change in our perception of the problem and the solution. Argyris illustrates these levels of learning simply and clearly using the following analogy:

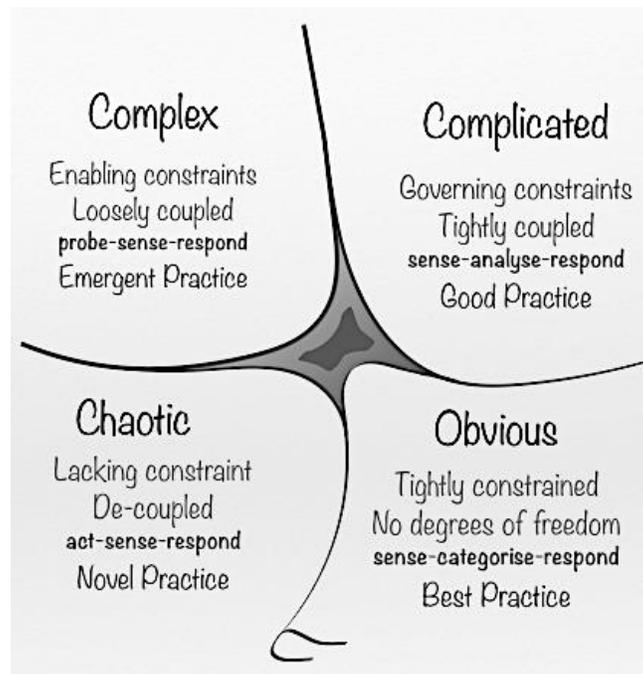
[...] a thermostat that automatically turns on the heat whenever the temperature in a room drops below 68 degrees is a good example of single-loop learning. A thermostat that could ask, "Why am I set at 68 degrees?" and then explore whether or not some other temperature might more economically achieve the goal of heating the room would be engaging in double-loop learning. (Argyris, 1991: 4)

To these two loops is added a third, called *deutero-learning*, which essentially refers to taking a step back from our single and double loop learning to learn how to learn (Argyris, 2003: 1179): "We understood deutero-learning to mean second-order learning, reflecting on the first-order actions. Deutero-learning can occur by going meta on single or double-loop learning." From Argyris and Schön's perspective, a learning organization is one that knows how to integrate and mobilize different learning loops according to the complexity of the organizational challenges it faces.

Complexity and the Cynefin Model

Complexity theory reveals a third avenue for developing the organizational capacity for creativity and adaptation. While it is more rarely explored in the literature on the learning organization (van Eijnatten and Putnik, 2004), it nonetheless offers a coherent and highly relevant frame of reference for addressing the ecosystem of the community sector. Moreover, in addition to emphasizing the importance of evaluation for learning, complexity theory is relatively simple to put into practice thanks to the Cynefin model.

The Cynefin model refers to a very simple principle, namely that different kinds of problems require different approaches. Developed by Dave Snowden (2003), it was designed to address real organizational problems, to see phenomena from new perspectives and to assimilate complex concepts (Snowden and Boone, 2007). The Cynefin model proposes a division of organizational phenomena into two systems, ordered and disordered, which are in turn divided into as many domains: within ordered systems, there are the obvious and the complicated domains; while within disordered systems, there are the complex and the chaotic domains. Each of these domains corresponds to a strategy of action.



"Cynefin Framework", by Wikipedia contributors (2018a)

Obvious and Complicated Domains

The first domain of an ordered system, the *obvious* (*simple*, or more recently renamed *clear* by Snowden), is the one where the cause-and-effect relationship is well known. Here, best practices are appropriate because there are always a limited number of good solutions to the problem (Snowden and Boone, 2007). Take the example of a photocopier refuses to work because it has run out of paper: the cause is obvious, almost anyone can intervene, the effect of adding paper is known in advance, and the same solution can be reused.

The *complicated* domain also involves a cause-and-effect relationship that may be known, but some expertise is required to analyze and understand it (Snowden & Boone, 2007). As with the *obvious* situation, a solution exists and can be implemented with some guarantee of success. If necessary, solutions may be evaluated by comparing the desired effect to the actual effect and then addressing the observed gap. This same solution can then be taught and used in different contexts. Let us now go back to the photocopier, which, despite adding paper, still refuses to print. An expert will usually be called in to diagnose the issue, think about possible causes, and apply a set of good practices to solve the problem.

Complex Domain

Complex situations and problems are, by definition, always made up of a very large number of constantly interacting elements (Snowden, 2005). In this case, one cannot distinguish and isolate cause-and-effect relationships between these elements, as these relationships are too numerous, changing and intertwined to be analyzed. Examples include racism, culture and homelessness, all of which are at the heart of community action. We can try to understand where these complex phenomena come from by looking to the past, where many explanations and interpretations lie, but this will not help us accurately predict how these phenomena will evolve.

Thus, rather than focusing on the analysis of causal relations, this field invites us to focus on the emergence of patterns in the interaction between the different elements of complex phenomena (Snowden and Kurtz, 2003: 469). To make them more visible, the organization can launch, within certain *limits*, a multiplicity of probes: small, concrete experiments that test the system and inform us about it. If one of these probes affects the trend in a desirable way, we will give it more energy and amplify it. In all cases, the probes – or experiments – are programmed to fail safely (Snowden, 2007).

Rather than trying to find a solution to a problem, complexity theory invites experimentation and its constant and evolving evaluation. It prompts learning by doing, as in this famous *Apollo 13* scene:

There is a scene in the film *Apollo 13* when the astronauts encounter a crisis ("Houston, we have a problem") that moves the situation into a complex domain. A group of experts is put in a room with a mishmash of materials – bits of plastic and odds and ends that mirror the resources available to the astronauts in flight. Leaders tell the team: This is what you have; find a solution or the astronauts will die. None of those experts knew a priori what would work. Instead, they had to let a solution emerge from the materials at hand. And they succeeded. (Snowden and Boone, 2007)

Chaotic Domain

In the chaotic domain, it is impossible to observe cause-and-effect relationships (Snowden, 2005). In fact, the system itself is turbulent: there is nothing to analyze and there is no time to experiment and wait for beneficial trends to emerge. Consider, for example, reacting to a fire. In this area, rather than thinking, one must act immediately and decisively. In doing so, we can find some order out of the chaos and help move the situation to the obvious or complicated domains. We may also multiply interventions in order to create new trends and move the situation to the complex domain. Either way, the fire must first be harnessed before other problems can be identified and addressed.

Evaluation

In an organization, evaluation makes explicit what is known and ignored. It states what is done, why and how it is done. Evaluation informs on the impact of the decisions that have been made, allows to verify the alignment of actions towards a given objective or direction and to compare vision and reality. For community-based organizations, evaluation methods derived from a *by and for* approach such as Évalpop can also contribute to the advancement of groups and their practices, the strengthening of associative and democratic life, the mobilization of members and the redistribution of power to organizations and their members. In short, evaluation can be a powerful tool for learning as well as organizational and social transformation.

Complexity and Evaluation

In an orderly system, evaluation involves observing the outcome of one's work, analyzing the gaps between expectations and actual impacts, and then making recommendations. Traditional evaluation methods, such as formative evaluation, have been developed for this type of linear system. Designed to evaluate specific programs, these methods allow us to establish clear objectives and indicators of success at the outset, and to map the path to achieving these objectives.

However, when organizations have to deal with complex situations and problems, as we defined them earlier, the unpredictability of their actions' effects and the problem's lack of finality renders these methods rather inadequate. Indeed, in such a context, it becomes risky to set final objectives and indicators of success from the outset. In a complex system, evaluation refers instead to monitoring and observing what happens when experiments are launched, in order to decide whether they deserve to be amplified, modified, or eliminated altogether (Corrigan, 2018).

Developmental and Principles-Focused Evaluation

There exists a vast array of evaluation methods (BetterEvaluation, n.d.), some of which are better suited than others to capturing complex phenomena. Two evaluation methods are particularly promising in addressing complex situations: developmental evaluation and principles-focused evaluation, both developed by Michael Quinn Patton (2011, 2018).

Developmental evaluation is a way to report, in real time, on the emerging effects of an innovation. It constantly provides data and information to its users to enable them to adjust their interventions, thus facilitating learning through experimentation (Patton, 2011). As its name suggests, principles-focused evaluation focuses on one particular object of evaluation: principles (Patton, 2018). Unlike plans or strategies that suggest an ultimate goal, principles suggest a direction for navigating complex problems.

In both cases, these evaluation processes support and generate organizational learning, provide ongoing feedback, and accompany changes in direction. Because they develop new measurement and monitoring tools as changes emerge and evolve, they are particularly well suited to assessing complex situations, allowing us to respond to uncertainty, stay connected to what is happening and react strategically (Gamble, 2008). Furthermore, these methods encourage everyone's participation and are adapted to the principles, objectives, missions and philosophies of NPOs.

An Ability to Navigate Complexity (Summary)

NPOs address complex issues, deal with equally complex organizational challenges, and must also evolve in a changing environment. In such a context, NPOs must generate new knowledge and be able to find sustainable and innovative solutions to their problems, which is precisely what LOs enable.

Developing this capability is no small task. Fortunately, several theoretical frameworks can be mobilized: Senge's systems thinking (2016), Argyris and Schön's loop learning (Argyris and Schön, 1978) and the Cynefin model from complexity theory (Snowden, 2005). The latter model seems particularly promising to us: it combines theory and practice in a coherent, pragmatic and intelligible whole. Moreover, it emphasizes the importance of evaluation as a learning strategy.

AN INTEGRATED MODEL OF THE LO

In our view, the learning organization integrates the four dimensions presented in this research: an organizational structure that fosters learning ; a climate conducive to learning ; an integrated vision of learning, innovation and work ; and an ability to navigate complexity. Although we have presented them one at a time, these dimensions are far from isolated. Here is an overview of some of the ways in which they interact.

A learning climate that builds trust, openness to new ideas and allows for safe risk-taking is essential to learning by doing. Such a climate also allows people to reflect, experiment, innovate and learn from their mistakes, all of which are essential to understanding complex situations. If there is a lack of trust between the members of an organization, it will be difficult to establish a more horizontal structure and distribute power.

A structure that fosters learning encourages teamwork, collaboration, experimentation, and open and transparent communication. In doing so, it encourages interaction and the creation of communities of practice, contributes to making working and learning more enjoyable, encourages people to get to know each other and build trust, and enables the understanding of complex situations by integrating different perspectives.

For the members of an organization, learning by doing makes learning more enjoyable and meaningful, enhances various competencies, questions organizational practices and helps them evolve. As such, it enables them to contribute significantly, legitimately and innovatively to the transformation of the organization. Furthermore, learning by doing facilitates the transfer of knowledge within the organization, particularly knowledge created when navigating through complexity, and facilitates the creation of bonds of trust between colleagues.

Navigating complexity values the diversity of perspectives and learning styles in an organization, allows everyone to be pragmatically and collectively involved in problem solving, and encourages risk taking and trial and error. Evaluation can also help build trust in and among members of an organization and encourages the consideration of everyone's views, regardless of their position in the organization.

CONCLUSION: TOWARDS THE LEARNING NPO

Becoming a learning organization is a complex process with no prescribed steps, no magic formula, and no standard ideal. In practice, the four LO dimensions that we have identified do not have to be articulated in the same way or with the same intensity in all workplaces. One organization may for instance choose to maintain a traditional, hierarchical organizational chart, but work in a more flattened way, while another may decide to be completely horizontal. On the other hand, not every organization can afford the same degree of experimentation: front-line workers have to combine more constraints and risks than, for example, COCo facilitators.

The four-dimensional model we have proposed in this research is therefore not intended to be a prescription, but a statement of principles that we believe can inspire and contribute to the creation of a learning culture in organizations. This is the direction in which the LabOA project is heading, that is to say, prototyping a coaching approach to the development of learning capacities based on the four dimensions:

- A. An organizational structure that fosters learning.
- B. A climate conducive to learning.
- C. An integrated vision of learning, innovation and work.
- D. An ability to navigate complexity.

THE LEARNING ORGANIZATION: A PANACEA?

The idea of the learning organization is often promoted as a panacea that all organizations should adopt (Hayes, 2002). Typical arguments in favour of this mass conversion are that such organizations improve their performance (McHargue, 2003; Pérez López, Manuel Montes Peón and José Vazquez Ordás, 2005) and excel in the future (Senge, 1990). In addition, becoming a learning organization is often seen as a way to create and maintain a competitive advantage in the marketplace (Appelbaum and Gallagher, 2000; Senge, 2016), increase revenues, profits, and the economic value of the organization (Kim, Watkins, and Lu, 2017), or as a matter of survival (Argyris, 1977; Pedler, Boydell, and Burgoyne, 1994).

This vision of the LO does not, however, address the power differentials that may exist between workers and employers within the same organization. It has indeed been observed that within a learning organization, "workers who are empowered to challenge certain organizational policies are often silenced" (Spencer 2002: 299). Moreover, from these perspectives, learning and knowledge are measured in a market or financial logic and become resources that can be created, sold and exchanged like any other commodity.

From this point of view, learning has the potential to be used as a way to demand more from workers, and at a lower cost to the organization (Marsick and Watkins, 1999). Indeed, individual learning processes in organizations can be usurped to turn workers into the instruments of organizational goals (Garrick and Rhodes, 1998). Viewed from this angle, LOs can therefore contribute to the emergence of new mechanisms of oppression and managerial control. Garrick and Rhodes also suggest that the dominant perspective of organizational learning, such as that conveyed by Senge, is in fact a project that "focuses on control, maintaining orthodoxy and [...] eliminating difference." (1998: 6).

WHAT ABOUT NPOs ?

Despite the plethora of definitions of the learning organization, few authors discuss its application in the nonprofit sector. As presented here, the concept emerged and was developed for the corporate sector. Spencer (2002) suggests that applying concepts from the corporate world, such as the learning organization, to the nonprofit world can lead to imposing a corporate

discourse and setting aside certain values, notions and structures that are characteristic and essential to NPOs:

Another problem in the literature is the tendency to treat all organizations as the same, this partly reflects the imposition of business rhetoric on non-business organizations, such as public services, universities, hospitals, non-profit and non-governmental organizations, all are seen as dealing with "clients" within the context of a "business plan" and having to apply business principles to the "bottom line". Scant regards is paid to the notion of the "public good" or the quasi-democratic structures that govern these organizations and distinguish them from corporate capital. (Spencer 2002: 301)

This said, it turns out that organizations, regardless of their activity sector, share certain realities. Financial constraints, for example, are not unique to the private sector. In our opinion, the particularity of the NPO environment lies in the non-economic values and principles that can be mobilized to imagine, contextualize, redefine and develop the concept of the learning organization. It goes without saying that learning must serve and reinforce the organization's mission, but we believe that this process must not be limited to that: it must also be liberating and emancipating.

In this research, we therefore chose to observe the learning organization from a resolutely anti-oppressive standpoint, which aims to strengthen associative and democratic life between and within organizations, and which hopes to enable individuals to transform themselves and their environment. Also, by following this direction, we believe that we can avoid the dangerous pitfalls mentioned previously. Two resources have been invaluable in guiding our research in this direction: *The Characteristics of White Supremacy Culture* from *Dismantling Racism: A Workbook for Social Change Groups* (Jones & Okun, 2001), and the *Arts & Equity Toolkit* published by Neighbourhood Arts Network (Louis & Burns, 2012).

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