

# Building Organizational Learning Capacity: A Road Map for Nurse Executives

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The purpose of this article is to guide nurse executives in building learning capacity within their organizations. The Organizational Learning Road Map provided is grounded in the American Organization for Nursing Leadership's Nurse Leader Core Competencies. Key steps include: developing one's self as a learning leader, sharing a learning-focused vision for the organization, establishing a culture of learning, charting a course toward becoming a learning organization, developing a leadership team to support learning throughout the organization, measuring progress toward the vision, and sustaining momentum.

**N**urse executives have broad and varied responsibilities within health care organizations. Such responsibilities include establishing and maintaining clinical standards within the organization, overseeing clinical operations, managing resources in ways that preserve and enhance the organization's financial viability, providing leadership for various clinical service lines, and facilitating collaboration among interdisciplinary teams.<sup>1</sup> In August 2022, a sample of 2336 nurse executives identified their top challenges as attending to the emotional health of staff, retaining staff, and managing a contingent workforce.<sup>2</sup> While these current challenges were exacerbated and highlighted by the COVID-19 pandemic, they overlay decades-long issues related to federal reimbursement, emerging evidence-based practices, new technologies, health system mergers, and the expanding role of health systems in advancing population health. Thriving in such an environment requires nurse executives and their organizations to rapidly and effectively adapt to new circumstances, adopt new practices, and generate innovative solutions.

## ORGANIZATIONAL LEARNING

Organizational learning is an effective strategy for navigating change, making it possible to sustain excellent care in the midst of change. In fact, in today's complex, dynamic health care environment, a health care organization's capacity to learn may be the most valuable currency it has. Organizational learning is "a process of positive change in the collective knowledge, cognition, and actions within an organization, which

enhances the organization's ability to achieve its desired outcomes."<sup>3</sup>(p643)

Organizational learning means there are team members who are exchanging knowledge and ideas, learning from past experiences, engaged in intentional efforts to improve the organization, with an overarching goal to achieve and sustain improvements in the organization. Such activities are most conducive to learning when they occur in a context where people are motivated toward a shared vision, have the resources needed to support change, and feel psychologically safe to engage in the change process.

## BUILDING ORGANIZATIONAL LEARNING CAPACITY

Nurse executive leadership is crucial for establishing and sustaining their organization's capacity for learning. The key leadership actions are illustrated in

### KEY POINTS

- In a complex, dynamic health care environment, a health care organization's capacity to learn may be its most valuable currency.
- Nurse executives are uniquely positioned to establish a vision, culture, and strategic direction for learning in their organizations.
- Nurse executives can build learning-driven leadership teams that support learning throughout their organizations.



**Figure 1.** Organizational Learning Road Map

the Organizational Learning Road Map (*Figure 1*): self-development, sharing a learning-driven vision for the organization, establishing a culture of learning, charting a course toward becoming a learning organization, developing a leadership team to support learning throughout the organization, measuring progress toward the vision, and sustaining momentum. Fortunately, the competencies nurse executives need to support organizational learning are well-aligned with those found in the American Organization for Nursing Leadership's (AONL) recently released Nurse Leader Core Competencies.<sup>4</sup> The competency domains are: Professionalism, Communication and Relationship Management, Knowledge of the Health care Environment, Business Skills and Practices, and Leadership. All of these competency domains are grounded in a more intrinsically-focused sixth domain—Leader Within.

### Self-Development

Developing the Leader Within<sup>4</sup> is essential preparation for leading a learning organization. Nurse executives can accomplish this by becoming familiar with the literature on organizational learning, reflecting on their leadership strengths, considering the support needed to lead a learning organization, setting personal development goals, and gathering necessary support in the form of colleagues, coaches, and professional organizations. By definition, organizational learning is a process of change. Nurse executives who are firmly

grounded in their own leadership can develop healthy ways to process and ultimately embrace change. This can position the nurse executive to support others as they deal with feelings of grief for the “way we used to do things” and uncertainty about what the future holds.

- Perform a self-assessment to determine areas of strength and opportunities for development.
- Create a professional development plan to augment areas of need.
- Read 2 articles or books about organizational learning.
- Identify 3 people with expertise in organizational learning and seek their support.

### Share a Learning-Driven Vision

Articulating visionary thinking is a component of AONL's Leadership and Communication and Relationship Management competency domains.<sup>4</sup> A clear, inspiring vision for organizational learning, articulated by the nurse executive, helps unify, motivate, and guide team members as they work to achieve that vision. Such visions energize and attract people the nurse executive will need to create a continuously learning organization. The vision should emphasize learning's driving role in realizing organizational goals, and the centrality of engaging every team member in the learning process. It should underscore the importance of hearing a variety of perspectives, innovative thought, taking bold initiatives, and learning from every experience.

The nurse executive's vision should shape thinking, discussions, and decisions within the organization. As such, team members should hear and see the vision statement regularly. For example, the vision statement, or key words and phrases from it, could be articulated before meetings and at the beginning of each shift. It could be visible on signage, meeting agendas, lanyards, identification badges, and email signatures. Ultimately, the vision should permeate every aspect of the organization's operations.

- Determine what the vision for organizational learning could be. What do you want to have happen?
- Get buy-in from teams about the organizational learning vision.
- Post the vision for organizational learning in all nursing departments.
- Identify a clear “why” for organizational learning and help others do the same.

### Establish the Culture

With a vision for organizational learning articulated, the nurse executive must establish a culture conducive

to learning.<sup>5</sup> Competencies related to establishing culture span the Professionalism, Leadership, and Communication and Relationship Management competency domains.<sup>4</sup> While a learning-driven vision may excite some team members, many may be wary of the interpersonal risks inherent in organizational learning. The process of learning with and from others will likely require team members to embrace more inclusivity, humility, and vulnerability than they were previously accustomed to. It is critical to acknowledge the uncertainty that often accompanies personal and collective growth, while emphasizing the importance of leaning into that process. When the nurse executive acknowledges the reality and importance of taking those interpersonal risks, they create a safer space for team members to engage in the learning.

Due to the nurse executive's formal authority and visibility in the organization, role modeling can be one of their most powerful tactics for establishing a culture of learning. For example, nurse executives can model a culture of inclusivity by recruiting and developing a diverse leadership team with a variety of experiences and perspectives. Nurse executives can model a culture of humility by sharing their own ideas, openly acknowledging others' expertise, and enthusiastically championing others' ideas. Similarly, vulnerability and accountability can be modeled by publicly admitting one's own mistakes and addressing them in productive ways that support future improvement for the executive and the organization. Team members who see the nurse executive role model learning behaviors will be more likely to engage openly with the nurse executive and adopt those same behaviors for themselves. Celebrating efforts and achievements related to the organization's learning vision helps build and reinforce the desired culture.

- Assess the culture to determine strengths, opportunities, and potential threats.
- Perform a readiness-to-change assessment using a change framework.
- Share the organizational learning vision consistently during all interactions with teams.
- Be authentic and transparent in sharing what you do not know and missteps you take.
- Create opportunities for teams to share concerns and voice their opinions.
- Identify learning champions for each area of the organization.

### Chart the Course

With a vision in mind and a learning culture beginning to coalesce, the nurse executive can chart the organization's course toward becoming a learning organization.<sup>5</sup> To enact the vision, team members will need structure and a strategic plan for doing so. Competencies relevant to this stage of the process include:

Leadership, Knowledge of the Health Care Environment, and Business Skills and Principles.

Adopting a theoretical model may be one way nurse executives can provide structure to support organizational learning. One example is the Organizational Learning in Hospitals model,<sup>3</sup> which illustrates the relationship between the organizational context, actions, and outcomes associated with organizational learning. Models like this provide a theoretical structure to guide goal-setting, planning, decision-making, and evaluation throughout the organization. For example, the Organizational Learning in Hospitals model suggests the importance of psychological safety for organizational learning. This may prompt leaders to reflect on and assess psychological safety within the organization, then make a concerted effort to help team members feel psychologically safe. The selected learning model should be visible throughout the organization, particularly in locations where strategic decisions, planning, and collective reflection occur.

The strategic plan for enacting organizational learning should be very practical, and requires buy-in at every level of the organization. Depending on the size of the organization, the nurse executive might work with a leadership team of service line directors, mid-level leaders, and/or front-line managers to select strategies for promoting organizational learning. As part of that planning, the leadership team should select and prioritize monthly, quarterly, and annual learning goals so that the organization can make steady progress toward its vision without becoming overwhelmed or paralyzed. The nurse executive's leadership team can then, in turn, plan and set goals with their respective teams. One strategy for building buy-in is to identify a service line or department that is ready for change and can help teams in the organization experience some early wins. These early wins can motivate others to come on board, allay some anxiety about the change process, and establish an experiential basis other leaders can draw upon to guide their teams.

- Set achievable, targeted goals for organizational learning with each team, service line, and department.
- Adopt a communication framework, such as those from the TeamSTEPPS toolkit.
- Provide resources, seminars, webinars, and literature to educate team members about organizational learning.
- Create a dissemination plan outlining the 'why, what, who, how, when, and outcomes' of organizational learning.

### Develop Your Leadership Team

As chief learning officer within their organization, nurse executives must be intentional as they recruit,

mentor, and develop a leadership team supportive of learning. These activities are grounded in the Leadership and Communication and Relationship Management competency domains.<sup>4</sup> Often nurse executives are coaching and helping other leaders develop their own teams. For example, service line directors will need support as they develop teams of front-line nurse managers, clinical supervisors, and charge nurses. It is crucial to meet with nurse leaders individually to provide coaching on organizational learning. Development for organizational learning may include bringing in outside consultants, holding “journal club” style meetings in which leaders discuss relevant resources, sharing ideas and successes, asking for help, and supporting each other through the learning process. Finally, the importance of modeling these behaviors cannot be overlooked when coaching others to adopt organizational learning. Modeling key phrases and behaviors can help other leaders learn and adopt similar behaviors. For example, nurse executives can integrate concepts from the organization’s learning model into their decision-making process, which underscores the model’s importance and demonstrates its usefulness.

- Create listening sessions where leaders can openly share their ideas, wins, and opportunities for learning.
- Assign mentors for each member of the leadership team.
- Assess leadership skills using a leadership assessment tool, such as the AONL Nurse Leader Competency Assessment Tool.
- Develop internal leadership development fellowship opportunities in which the concepts of organizational leadership are integrated into the curriculum.

### Measure Your Progress

As a champion for learning, the nurse executive should ensure learning and performance objectives are regularly measured and discussed. The Business Skills and Principles and Professionalism competency domains<sup>4</sup> address evaluation and accountability related to organizational objectives. Learning-focused objectives relate to engagement in learning processes, such as reporting errors and near-misses, collectively reflecting on past experiences to inform future initiatives, and piloting changes on a small scale before broader implementation. Performance objectives are outcomes-focused, such as staff retention, patient experience, and clinical outcomes. Measuring and discussing both learning and performance objectives can help inform, motivate, and sustain additional learning behavior.

Progress toward objectives must be visible and clearly communicated at all levels of the organization. For example, a department focused on promoting

civility and reducing workplace violence should post clearly written goals, steps taken toward implementing solutions, and the department’s current performance data. Meetings should always start with a review of relevant goals and how the department is progressing toward them. Setting regular check points (e.g., monthly, quarterly) for reviewing performance metrics will help team members be accountable. Collectively reflecting on evaluation data, freely praising effort and improvement, and withholding judgment and blame can help reinforce a learning-focused culture.

Nurse executives can also use evaluation and discussion to foster continued learning-focused development among members of their leadership team. For example, does the leader role model behaviors that support organizational learning? Do they communicate with clear and open intent that extends to those on the frontlines of implementation? How do they communicate with other departments that may be indirectly impacted by an organizational change? Sharing feedback, celebrating progress, and providing coaching can facilitate their development as learning-focused leaders. It is important that nurse executives make explicit the strategies they are using so their leadership team can replicate those strategies within their areas of responsibility.

- Identify an electronic platform to house performance data.
- Create a scorecard for all metrics.
- Discuss progress toward metrics at each leadership meeting.
- Celebrate wins regularly.

### Sustain Your Momentum

Sustaining momentum toward the learning-focused vision, both within the nurse executive’s leadership team and the organization as a whole, can be daunting, especially when initial progress may be slow. To do this, the nurse executive will have to draw on the Leader Within, Leadership, Communication and Relationship Management, and Professionalism competency domains.<sup>4</sup>

One of the nurse executive’s primary tasks is to sustain their own momentum toward a learning-focused vision. They should routinely reflect on their personal commitment to learning, the clarity of their learning-focused vision, how well they are living and emulating the ideals espoused for the organization, and what additional development and support they need. Given the demanding nature of the nurse executive’s role, it is important to consider organizational learning as a strategy for addressing existing responsibilities, rather than an additional obligation of responsibilities, use it as a strategy for approaching those responsibilities.

Sustaining momentum requires leveraging any success into subsequent successes. For example, the nurse executive might identify a leadership team member whose outstanding efforts have contributed to learning in the organization. That leader could be asked to share about their success during an executive team meeting, or be asked to mentor another leader who might be struggling and has not caught the vision. Regularly recognizing effort and success toward the learning-focused vision reinforces organizational values and helps sustain momentum. Examples of meaningful recognition include private praise, public recognition, additional developmental opportunities, financial incentives, and other programs available within the organization.

The organization's long-term momentum toward a learning-focused vision will require intentional hiring and succession planning. Beginning with the hiring process, nurse executives should be purposeful about creating a learning-focused leadership development pipeline that extends to the front-lines of the organization. When hiring for leadership positions, consideration should be made for the candidates' knowledge, attributes, and commitment to carrying the vision forward. Developing and preparing these leaders for expanded leadership roles is essential for sustaining the nurse executive's learning legacy beyond their tenure with the organization.

- Develop quarterly and annual reviews of each goal.
- Reflect on wins and learning opportunities.
- Ask specific teams to 'present' learning case studies at quarterly meetings.
- Develop hiring criteria that emulate the characteristics of a learning organization.

## CONCLUSION

A health care organization's capacity for learning will dictate its ability to thrive in a complex, dynamic health care environment. The nurse executive is uniquely

positioned to build their organization's learning capacity by establishing and leading their organization toward a learning-focused vision. The Organizational Learning Road Map presented here, grounded in the AONL's Nurse Leader Core Competencies, provides guidance for nurse executives to build learning capacity within their organizations.

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