



# Worksheet: Learning Culture Initiative Planning

Designed for teams in news organizations, this worksheet will help you assess the potential for more knowledge and resource-sharing in the short- and medium-term.

This worksheet – created by [Clint Schaff](#) with support from the American Press Institute – is inspired by [The Marshall Project's approach to building a flexible learning culture](#).

Learn more about supporting cultures of learning in [API's June 2025 Need to Know special series](#) developed by the 2024-25 Table Stakes Alumni Advisory Board.

## IDENTIFY YOUR KNOWLEDGE GAPS

Think about your organization in its current state. **What knowledge-sharing challenges does your team face?** Add a checkmark (✓) next to all that apply below.

|                                                             |  |
|-------------------------------------------------------------|--|
| Knowledge is siloed within departments                      |  |
| Expertise is concentrated among a few veteran staff members |  |
| Remote work makes collaboration difficult                   |  |
| Documentation is outdated or difficult to access            |  |
| Staff onboarding is inconsistent                            |  |
| Other (please specify)                                      |  |

Now, consider your organization's current state of knowledge-sharing. Think about how your organization functions and your team's capacity: How are knowledge and resources currently being shared? How does this impact your team?

👉 **Need help getting started?** [Try this "from/to" formula and find examples in this May 2024 Special Edition series on measuring well-being.](#)

**Describe your current state of knowledge sharing:**

Now, think about your team's potential for sharing knowledge and resources internally. How can your team benefit in your ideal future state?

**Describe your ideal future state:**

## INITIATIVE DESIGN

Craft a short- or medium-term initiative — that is feasible for your team — to make your ideal future state closer to reality. To start, consider one of these two options:

### Option 1: A documentation program to reinforce institutional knowledge

The objective is for staff to note new and existing processes, tools, information and practices in a central, accessible location.

**Frequency:** Add a checkmark (✓) to select how often teams would ideally revisit the documentation.

|                                   |  |
|-----------------------------------|--|
| Weekly                            |  |
| Biweekly                          |  |
| Monthly                           |  |
| Quarterly                         |  |
| Other frequency: (please specify) |  |

**Format:** How can documentation time be used? Look at the options below and add a checkmark (✓) to formats that could fit your team’s schedule. Then add some ideas on how to integrate the structure into your workflow.

👉 **For example:** Dedicated time blocks for documentation can be set for one hour every Friday afternoon.

| (✓) | Format                                  | What could this look like for our team? |
|-----|-----------------------------------------|-----------------------------------------|
|     | Dedicated time blocks for documentation |                                         |
|     | Collaborative editing sessions          |                                         |
|     | Department rotation system              |                                         |
|     | Other format: <i>(please specify)</i>   |                                         |

**Documentation Platform:** How will the documentation be stored and centralized? What kind of readily available technology can be applied? Add a checkmark (✓) to tech solutions that could work for you.

|                                         |  |
|-----------------------------------------|--|
| Wiki                                    |  |
| Shared drive                            |  |
| Existing CMS                            |  |
| Database                                |  |
| Other platform: <i>(please specify)</i> |  |

**Topics to document first:** List 3 - 5 processes or projects that need to be documented. Then prioritize them in order of importance.

|    |
|----|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

**Option 2: Schedule knowledge-sharing sessions to share in-house expertise**

The objective is for staff to learn from one another and outside experts in a low-pressure environment. Beyond professional development, these sessions can also foster connection. Sessions can occasionally be used to build community through activities such as onboarding interns or celebrating organizational milestones.

**Frequency and session length:** Add a checkmark (✓) to select how often teams can connect for knowledge sharing and for how long.

|                                          |                                       |
|------------------------------------------|---------------------------------------|
| Weekly                                   | 30 minutes                            |
| Biweekly                                 | 60 minutes                            |
| Monthly                                  | 90 minutes                            |
| Quarterly                                | Other length: <i>(please specify)</i> |
| Other frequency: <i>(please specify)</i> |                                       |

**Format:** Consider the options below for how knowledge-sharing can be facilitated. Add a checkmark (✓) to session styles that could work for your team. If you have ideas or notes about specific formats, include them below.

| (✓) | Format                                | Notes or ideas |
|-----|---------------------------------------|----------------|
|     | Presentation                          |                |
|     | Q&A                                   |                |
|     | Interactive workshop                  |                |
|     | Informal skill-sharing                |                |
|     | Other format: <i>(please specify)</i> |                |

**Initial Topics:** List 5 - 8 ideas for potential knowledge-sharing sessions. Consider:

- **Existing staff expertise:** Are they willing to share what they know?
- **Current needs:** What kind of resources or knowledge does your staff need now?
- **Proactive planning:** What skills do your colleagues want to develop or learn about?

|    |  |
|----|--|
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |
| 6. |  |
| 7. |  |
| 8. |  |

# PILOT PROGRAM PLANNING

Eager to get started on your learning culture initiative? A pilot program can help steer you and your colleagues into action.

Decide on a start date and how long (weeks or months) you can feasibly dedicate to piloting a documentation plan or developing knowledge-sharing sessions.

## Start Date

|  |
|--|
|  |
|--|

## Expected duration of pilot

|  |
|--|
|  |
|--|

**Success Metrics:** How will you measure the impact of your initiative?

Consider at least one of the options below and add a checkmark (✓) to metrics that could work for your pilot. Then add ideas for goals. Before finalizing goals, consult with colleagues to see if the goals are feasible for your team.

👉 **Revisit SMARTIE goals:** [See examples here](#) for objectives that are Specific, Measurable, Achievable/Aggressive, Relevant, Timebound, Inclusive and Equitable.

| (✓) | Metrics                                   | Goal |
|-----|-------------------------------------------|------|
|     | Attendance/participation rates            |      |
|     | Staff feedback (informal)                 |      |
|     | Documentation growth/usage                |      |
|     | Increase collaboration across departments |      |
|     | Onboarding improvement                    |      |
|     | Other metrics: <i>(please specify)</i>    |      |

# RESOURCE REQUIREMENTS

Creating resources to support and reinforce your learning culture will take time and effort. List the team members who can contribute, their contributions to the resources and expected time commitment. This "requirements" matrix can help colleagues manage expectations and manage expectations across the board.

| Role | Contribution | Time Commitment |
|------|--------------|-----------------|
|      |              |                 |
|      |              |                 |
|      |              |                 |
|      |              |                 |
|      |              |                 |

**Budget Considerations:** How much will internal knowledge-sharing initiatives cost? Estimate expenses below to help your organization budget for current improvements and future investments.

Internal facilitators

\$

External speakers

\$

Platform/tools:

\$

Other costs

\$

**Technology:** What tools will we need to successfully support this pilot? Add a checkmark (✓) to options that could help you. You can also add tech needs specific to your team.

|                                                                                                    |  |
|----------------------------------------------------------------------------------------------------|--|
| Video conferencing platform                                                                        |  |
| Recording and accessibility (i.e. transcription, digital storage of training videos and materials) |  |
| Documentation software                                                                             |  |
| Scheduling tool                                                                                    |  |
| Other technology: <i>(please specify)</i>                                                          |  |

## IMPLEMENTATION ROADMAP

Consider this sample roadmap for your pilot initiative. Start here and customize milestones for your team to fit your expected timeline.

### Phase 1: Preparation (1-2 weeks)

- ☐ Identify your "coalition of the willing"
- ☐ Select and set up necessary platforms
- ☐ Develop initial schedule
- ☐ Announce initiative to staff

### Phase 2: Pilot Program (4-6 sessions)

- ☐ Launch with clear expectations
- ☐ Document attendance and engagement
- ☐ Collect informal feedback
- ☐ Make real-time adjustments as needed

### Phase 3: Evaluation & Iteration

- ☐ Review what worked/didn't work
- ☐ Gather staff input on future topics/formats

- ☐ Refine approach based on lessons learned
- ☐ Develop ongoing schedule

## MAKE IT SUSTAINABLE

**Iterating through challenges:** Maybe your organization has tried to formalize knowledge-sharing before and had difficulty sustaining the workflow or momentum. It's OK to try again! Iteration can help with solving organizational hurdles.

Take a look at the table below and think about how these challenges, which are common to news organizations, can be tailored toward solutions that are flexible around your team's time and circumstances.

| Challenge                 | Potential Solution                                         |
|---------------------------|------------------------------------------------------------|
| Low attendance            | Align with existing meetings, offer incentives             |
| Uneven participation      | Rotate departments, targeted invitations                   |
| Maintaining momentum      | Create a regular schedule, build into workflow             |
| Content becoming outdated | Regular review cycles, assign "owners" for the information |

**Tips to try:** As you continue to guide your organization's learning culture initiatives, consider these guiding principles to help make new knowledge-sharing practices and workflows stick:

- Start small and build gradually
- Frame as a pilot to reduce pressure
- Emphasize that these should be enjoyable, not burdensome
- Empower staff at all levels to contribute their expertise
- Consider partnering with other organizations to share resources
- Make recordings available for those who can't attend live

Read more about how these principles support *The Marshall Project's* learning culture in [API's Need to Know newsletter](#).