



A LITERATURE SURVEY

# Organisational learning: purpose, thinking & practices

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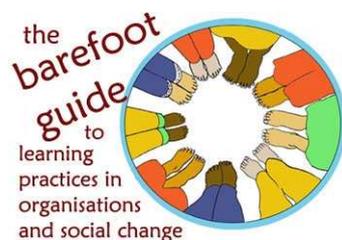
**A literature survey**

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# 1. Purpose and outline of this paper

This survey was conducted for the Thematic Learning Programme 'Organisational learning and social change', supported by PSO, VSO and CDRA.

The Programme was started because **learning lies at the heart of sustainable social change**. The ability of people to learn from their own and each others' experiences, to guide, improve and rethink future action, is central to resilience, sovereignty and empowerment. Learning is not merely a support to transformation, but a central ingredient.

Social change practice is proving to be more complex than ever imagined, defying academic theories and instrumental manuals, models and tools. This complexity requires social actors and organisations, from the ground up, to invest more in conscious thinking and learning processes informed by their own and each others' experience, out of rigorous processes of action learning or action research.

The idea and need for organisational learning appears to be regaining some ground amongst practitioners and donors. There is a call from many quarters to shift the current centre of gravity of planning, monitoring and evaluation (PME) systems from serving the needs of accountability to donors, to the need for all practitioners, including donors, to learn more consciously and rigorously from their own and others' experience, in order to continually improve and rethink practice.

That said, this is not a shift away from accountability, but rather a better kind of accountability, a re-orientation towards an authentic learning-centred approach, which because it encourages honest reflectivity, produces a genuine accountability to constituencies up and down the system, that provides ongoing learning, direction and ownership throughout.

But recognising the need to learn is not enough. How to make useful learning really happen and then to translate new learning into improved practice that leads to better impact, is not well understood. Learning and change in Civil Society Organisations (CBOs, social movements and NGOs) has proved to be difficult for multiple reasons, ranging from a lack of external and internal support (learning takes time and money), to poor learning culture, even a resistance to learning. Importantly, those who have the will to learn often lack simple, lively, engaging and fruitful learning process designs, methods and techniques that really can lift learning practices to more effective levels.

This programme hopes to make a significant contribution to addressing these problems, challenges and needs.

The purpose of this literature survey is to assist the Writers Collective of the Programme on Learning Practice and Social Change in designing and developing the Barefoot Guide II on Organisational Learning for Social Change. It does so by presenting a selection of existing materials on the purpose, thinking (theories and models) and practices of organisational learning. As an overview, there is minimum commentary and analysis, but sufficient information is provided to prompt the reader to find the original texts most relevant to her/his area of interest for further study.

The survey addresses the following issues:

Our times and context and its implications for learning

- some of the shifts relevant to organisational learning
- what has changed roughly in the last decade?
- reflection during and not only after the experience

Influential thinkers and practitioners in the field of learning

- definitions of learning
- schools of thought
- some thinkers on (organisational) learning

Individual learning

- forms and levels of learning
- experiential learning
- individual and cultural differences

Organisational learning

- an overview of organisational learning
- organisational learning and capacity development
- knowledge management and organisational learning
- factors which enhance learning and factors which inhibit learning

The politics of learning and implications for facilitators

- who is responsible for whose learning?
- six dimensions of facilitation
- facilitator's authority and style

## 2. Context, learning and change

This section looks at our context, some of the key changes in our world and their implications for learning. It also provides an overview of key changes in the field of learning and organisational learning in particular.

### 2.1 Context and why we need to learn

The content of this sub-section is primarily drawn from Jan Visser's paper Learning Communities: wholeness & partness, autonomy & dependence in the learning ecology. October 2001.

The rate of environmental change has overtaken the rhythm set by the approximately 20-year time interval separating the human generations. This has profound implications for the ways in which people prepare themselves for life and maintain their preparedness throughout life. It also has implications for the role a previous generation can play in preparing the conditions of learning for the next one.

By 1960 (after 3million years of hominid development) the world population was approximately 3 billion. In less than 40 years following that, human population doubled, reaching the 6 billion mark. Yet our planet is still the same size. The pace of responding to the challenges resulting from our rapid growth, is accelerating at an equal rate, "leading to explosive development which causes human activity to impact not only locally, but to affect people everywhere as well as to have consequences that not we, but future generations will experience" (p2).

The problems we face are global, threatening our sustainability and complex in nature. Their solution is no longer dependent on the actions of central government; they require the involvement of all of us.

When you consider that human beings have developed to the point that we are not only capable of, but are already headlong into destroying ourselves and other life with us – questions of the purpose of human existence (why are we here?) become even more loaded. "Our increasing technological capabilities make it possible to intervene more and more in our very humanity." The question 'what is the meaning of learning?' will likely be replaced with questions such as 'what is the meaning of being human?' in generations to come.

Another fundamental change is in how we view the world. We are shifting from a world view dominated by scientific reductionism to an ecological world view. Sandow & Allen (2005) refer to our times as the 'Knowledge Age' and explain that the ecological sciences and philosophies view knowledge, people and organisations as living systems, characterised by complexity and collaboration.

According to Gregory Bateson, cited in Jay Cross's Informal Learning Blog<sup>1</sup>, we're viewing the world shifting:

- from focusing on the parts to focusing on the whole
- from focusing on categorisation to focusing on integration
- from focusing on the individual to focusing on interactions
- from focusing upon systems outside the observer to focusing on systems that include the observer.

<sup>1</sup> [www.informal.com/2006/04/13/the-nature-of-social-collaboration](http://www.informal.com/2006/04/13/the-nature-of-social-collaboration) (accessed on 08/09/09)

*What are the implications for learning?*

- “Everyone, at any age, is in need of learning, and continuous development of the capacity to learn has become more important than the learning of specific competencies in the early stages of life.”
- As our well-being depends more and more on the well-being of others, there is growing urgency to not only learn to live together, but to learn to learn together.
- While we must truly learn to see the world as a whole and to understand what this means, individuals and communities must pay attention to their interaction with their immediate environment (think global, act local).
- We need to make our values central to our thinking about learning.
- We need to develop the ability to ask the important questions, to set responsible goals and to use technology wisely in the pursuit of those goals.
- We can no longer see ourselves as separate from the material world and therefore able to look at it objectively. We now understand ourselves as part of the material world and recognise that half of what we see is what we bring. Instead of idealising ‘objectivity’ we need to develop the faculties of critical subjectivity.

“The more complex and uncertain the environment, the more likely is the need for continuous innovation, learning and improvement.” (Chetley & Vincent 2003)

## **2.2 On some of the shifts in the field of organisational learning**

Part of the brief for this survey was to look for what’s “new, innovative & cutting edge”. We found it more useful to look at what’s changed in the field of organisational learning in the last decade or so.

*Learning and social change: the double agenda*

An emphasis on social change is re-emerging. Learning has, or should have, a double agenda: producing directly useful, practical knowledge and action on one hand, and empowering or conscientising learners on the other (Reason 2001). Central to Freire and others’ work on popular education developed in the 1960s & 1970s – the political nature of learning has effectively been back-grounded in subsequent decades. Learning is resurfacing as a political tool for social change. This re-emergence is linked perhaps to two primary shifts: the first in our understanding of what social change is and how it happens and the second, a shift in the world view of development.

*Learning and accountability rather than monitoring and evaluation*

The assumption that learning would flow from monitoring and evaluation no longer holds sway. Learning needs to be specifically designed for. The shift from traditional monitoring and evaluation to learning and assessment, places emphasis on serving the internal learning needs of an organisation (learning that is relevant to the learner and useful to his or her context and practice), rather than on upward accountability, reporting requirements and donor needs (Guijt 2007).

*Reconnecting the knowing and the doing*

There are many different ways of knowing and different types of knowledge. Some hold greater currency than others. For example our society values conceptual thinking, academic learning and intellectual prowess. However, within the experiential model of learning we see a reconnection between the knower and the doer and a revaluing of knowledge based on practice (Hill 2008, Reason 2001).

### *Doing and practice*

The word 'doing' is often used interchangeably with the words 'experience' (meaning direct perception of) and 'practice' in ways which could limit our understanding of learning. To focus on the experience of doing is an oversimplification which, Beard (2008) argues, masks other forms of experience rich in potential learning. Beard argues for a wider interpretation of the word 'practice' to include doing, sensing, feeling, knowing and changing.

### *Reflection during and not only after the experience*

In experiential learning reflection was previously understood as something which happened after the experience, but now its location within the experience itself has emerged strongly. Reflection is a skill which can be developed. It requires us to hone our ability to be attentive; to pay careful attention to what is going on around us and within us. It's an awareness or extra consciousness requiring all our senses, our cognitive and creative selves.

Jordan, Messner and Becker (2009) looked at what existing research on mindfulness might contribute to the understanding of how to organise reflection-in-action.

"In parallel to organizational reflection, the concept of mindfulness has been originally developed as an individual concept, with mindfulness being defined as an individual learning process characterized by a heightened awareness of the specific circumstances in a given situation. (...) Mindfulness in interaction is based on activities and routines that explicitly aim at providing opportunities to question expectations and behavioural routines and to evoke awareness of context in interaction. These routines may be termed 'interactive routines' because they are realized, or applied, in dyadic and/or small group interactions." (p467, 468)

They give the following systematisation of the different concepts:

- individual reflection-on-action and reflection-in-action;
- collective reflection-in-action;
- interactive routines that help realise collective reflection-in-action (e.g. mutual questioning);
- organisational routines that enable or foster reflection-in-action (e.g. job rotation);
- organisational routines that realize reflection-on-action (e.g. strategy review meetings).

Reflection in action requires that we stop from time to time during a process and consciously 'notice' what is going on, how we feel about it and what we are going to do about it, how we are going to 'intervene' (Boud, Saddington).

### *From information overload to sense making*

As the amount of information and our access to it skyrockets, our capacity to focus and to make sense of all we encounter is in danger of becoming more and more diffused. Max-Neef (2009) said that we have never gathered so much knowledge, but that our ability to make sense of it is extremely limited.

The way we organise and make meaning of our world is an inner activity. From a Goethean perspective what we see around us has meaning because of our own inner activity, it comes from interaction with phenomenon – not from the phenomenon itself. But sense making is not only an individual process it is also a social agreement (Davidoff, Kaplan & Soal in Hill 2009). We all make meaning of our experience and believe that this is the truth. Conversation allows us to check this truth out against other truths. The assumptions that drive us are often identified, revealed and challenged in community. Jonassen (2000) agrees; he describes making meaning as a process of social negotiation among participants in any activity. David Boud's Reflection Model emphasises 'personal foundation of experience' as a key learning component. A personal foundation of experience is one's unique make up, a combination of cultural and

social background, past experiences and internal make up. It is the lens or interior filter through which we experience life and influences the meaning we attribute to it (From Reflection in Action).

#### *Distinguishing knowledge from understanding*

In his paper From knowledge to understanding – Navigations and returns (2009) Max-Neef points out that while we know a lot, we understand very little. Despite having accumulated so much knowledge in the last 100 years, guided primarily by the pursuit of reason and scientific method, there is a growing sense that something is missing. This something is understanding. “We will realise that knowledge is not the road that leads to understanding, because the port of understanding is on another shore, and requires a different navigation. We will then be aware that we can only attempt to understand that of which we become a part. That understanding is the result of integration, while knowledge has been the result of detachment”(Manfred Max-Neef 2009 p18).

#### *Reconnecting inner and outer work*

For social change to be sustained, personal transformation needs to be part of the equation. People are recognising that they are the instruments of change and transformation. (Gillespie, Jandernoa 2010).

#### *What is work?*

Learning is the real work. Chetley & Vincent (2003) point to the softening in the world view of work. Instead of seeing conversation, peer support and ‘shop talk’ between colleagues as leisure activities, informal dialogue and learning are increasingly recognised as work.

### 3. Influential thinkers and practitioners in the field of learning

The better we understand learning and the thinking about learning, the better we will be able to create the conditions that nurture learning, individually, organisationally and socially. This section introduces some of the most influential schools of thought about learning as well as a few interesting thinkers and practitioners.

"Learning is dialogue, a process of internal as well as social negotiation."  
(Jonassen 2003)

"To learn something is to understand it, to retain that understanding and to be able to explain it effectively."  
(John Heron 1999)

"Learning challenges individuals and organisations to be true to self and to others; it demands courage, honesty and integrity. When individuals and organisations commit to learning, it enables them to bring more of themselves into shaping the world and in turn allows them to be shaped by it." (Nomvula Dlamini 2006)

"Learning involves a process of change, some of it unpredictable. Learning is never a linear process."  
"...effective learning transforms the individuals involved, the organisations involved and the stakeholders with whom they interact." (Chetley & Vincent (2003)

"In our understanding of 'action learning' we consider a lesson to have been 'learned' only when it becomes evident in changed (improved) action. Thus we do not consider 'knowing' something to be the same thing as having 'learned' it."  
(James Taylor 2006)

"Learning is all about how we change and become different from the way we were before." (Peddler & Aspinwall 1998)

"Learning and unlearning are two sides of the same coin. They can't be separate from each other as unlearning is a necessary condition for true learning." "Learning is the process of continually re-making the mind and to remake it, the mind must first have been made."  
(Jan Visser 2002 p1)

"Learning is a creative process that cannot be accomplished by a mechanical transfer of external knowledge".  
(Anisur Rahman cited in Trish Bartley 2003 p89)

### 3.1 Schools of thought

The relevance of knowing about these 'schools of thought' is to see that different views on learning and knowledge are based in different schools of thought each with their own underlying assumptions and concepts. Knowing these can help us to find and clarify our own view on learning and knowledge. This subsection is based on Sauquet's (2004) analysis of the different Schools of Thought that can be linked to learning and learning in organisations. Sauquet marks the following Schools of Thought:

*Behaviorism – Pavlov (1849<sup>2</sup>), Skinner (1904), Watson (1878), Weick (1936); Pavlov was a Russian and the other three American psychologists*

Organisms learn by associating certain responses with certain stimuli. As we know, learned responses can persevere long after the stimuli have stopped coming. Organisational learning is influenced by the concept of unlearning. Learning is understood as a connection between action (stimulus) and outcomes (responses), and the bond is reinforced through practice. Learning can be understood as a mere conditioning. The learner's role is a minor one. Learning strategies focus on development through training programmes which aim to impart pre-established practical skills and basic competencies (such as technical assistance in the development sector!).

*Cognitive School – Gardner (1943), Bruner (1915) both American developmental psychologists; March (1928) & Olsen (1939) an American and a Norwegian researcher; Nonaka (1935) & Takeuchi (1940) influential Japanese on business thinking; Piaget (1896) Swiss psychologist*

The initial goal was to study meaning; the movement soon focused its efforts on information and information processing. Key words are: confusion, information processing, mapping, construction. Influence on learning happens through models based on constructivism and through the concept of learning styles. Learning is basically understood as properly connecting thoughts, actions, and outcomes. Cognitive theories underscore the need for better understanding of mental models and the wise use of limited cognitive resources. There is an obvious division between thoughts and action and a sequential pre-eminence is presumed. This separation allows for the de-contextualised understanding of knowledge. "Knowledge is thus treated as a commodity that can be transferred from place to place. In consequence, knowledge can be managed like any other resource of the organisation. Not surprisingly, knowledge management activities end up being close to refined forms of information management systems" (p377).

It is interesting to see here the 'roots' of knowledge management supporters and it is good to realise that the underlying assumption is the concept of knowledge as a commodity that can be transferred.

<sup>1</sup> The date that is mentioned after each name in the headings within this chapter refer to the date of birth, and not – as it is used normally – to a particular publication of that writer.

*Pragmatism – Dewey (1859) American educational reformer; Kolb (1939) American educational theorist; Popper (1902) Austrian philosopher; Argyris (1923) American business theorist; Schön (1930) American philosopher*

Human beings learn as they try to solve problematic situations. Learning is not purely cognitive, but a combination of available knowledge and individual purpose. Dewey's coupling of learning with experience and the role given to reflection has helped shed light on how professionals

Pragmatism is the home of action learning. Underlying assumptions are:

- the concept of learning as a wilful effort that encompasses the whole person
- the concept of knowledge as connected to solving problems in real life experience; the appearance of knowledge is changed behaviour (embodied knowledge)

actually do their work in practice (Schön). “Thus learning is not restricted to a cognitive activity but should be understood as a wilful effort that encompasses the whole person as well as connecting past and future” (p379).

“It is surprising that the schools of thought reviewed so far add so little in terms of discussing the role of the social context for learning. This is even more paradoxical for interest in learning is associated with organisations. However (.....) most theories are concerned with how individuals learn in organisations. This is probably the case for the basic assumptions of behaviourism, cognitive psychology – even in its more constructivist version – and pragmatism takes on an understanding of human beings in which social interaction is not a constitutive process. However, pragmatism has had a considerable influence on learning concepts applied to organisation” (p379). For example Kolb’s experiential learning cycle. It is important to keep the link with Dewey’s original point that for learning to take place, the problem (i.e. the quality of the experience) should not be vicarious or simply contain similarities but rather be meaningful for the participants. “In other words, experiential learning would take place if the experience were a real one. It is precisely this objection which has been addressed through action learning programmes in which participants confront actual problems in small groups with the double goal of solving them and learning at the same time” (p379). This double goal is well known in Total Quality Management and made practical in so-called learning circles or improvement teams.

*Situated Learning – Vygotsky (1896) Soviet psychologist and founder of cultural-historical psychology*

The work of Vygotsky has been fundamental in opening up the possibility of developing a social version of learning. There is no such thing as abstract learning disconnected from the social context. The very social context determines the way ideas and concepts as well as learning content and horizons are incorporated. Moreover, learning does not leave the subject of learning intact. Instead, his or her very capacities are changed.

Knowledge and best practices develop in specific contexts and are tied to people’s behaviour in specific social arrangements. Introducing social factors into the learning environment can be understood as complementing the intra-individual theory of cognitivism by including the social context in its analyses. “This ‘cognition plus view’ (.....) is a position that enjoys a remarkable acceptance. The working model of Argyris and Schön is a good illustration.” (p381). “The situational learning perspective attempts to describe the learning processes interwoven with practice in context. From this standpoint we gain a better understanding of the relationship between learning and identity building and the role communities play in it.” (p382).

Where pragmatism introduces the whole person and learning from experience, situated learning introduces fully the social context and sees learning as an intervention that changes social context during the learning process. Learning changes the learner, in this case learning changes the community. This school of thought comes close to our interest in Learning Practices for Social Change.

### **3.2 Thinkers and practitioners**

*Paulo Freire (informal learning) – (1921) Brazilian educator and influential theorist of critical pedagogy*

Freire’s most well-known work is ‘Pedagogy of the Oppressed’. He had an impact on informal and popular education. He puts a strong emphasis on dialogue and the mutual respect of educator and educatee. It should not involve one person acting on another, but people working with each other. Education has to do with praxis – action that is informal and linked to certain values. Then the dialogue isn’t just about deepening understanding – but part of making a difference in the world. The process can be seen as enhancing

community, building social capital and leading to action. In this idea we can see similarities with School of Situated Learning

(Source: <http://www.infed.org/thinkers/et-freir.htm> last opened 12 February 2010).

*Rev Revans (action learning) – (1907) American management consultant*

“Revans is recognized widely as the principal pioneer of action learning and has done much research in this area.(....) Because of the significance assigned to real problem solving and unfamiliar venue, action learning meshes well with the need for spontaneity and speed of adaptation” (Dilworth, 1998).

*Peter Senge (organisational learning) – (1947) American scientist*

The term 'learning organisation' has become widespread mainly through Peter Senge's ideas. His ideas are a continuation of various other theorists' ideas involved in organisational learning. Senge introduces The Five Disciplines of the Learning Organisation:

1. Personal mastery  
Continuous clarification and deepening of the personal vision, keeping our efforts permanently focused, developing patience and an objective perspective of reality. Consistently giving shape to the ideas you really consider important.
2. Mental models  
Mental models are deeply rooted assumptions. We are usually not aware of such a model or its influence. For example, it strikes us that somebody at work is elegantly dressed and we think to ourselves, 'She is probably from a respectable family'. The discipline of working with mental models starts with introspection; we have to learn to uncover and scrutinize our own subconscious images. Our mental models influence the way we see things and the way we react to them.
3. Building a shared vision  
Leaders who learn to put this discipline into practice find how wrong it is to impose a vision, however heartfelt it may be. It has to come from each person separately. A shared vision ensures that people perform because they want to, not because they have to.
4. Team learning  
How can a team of well-meaning managers with individual IQs over 120 have a collective IQ of 63? This is the paradox to be solved by this discipline. Team learning is of essential importance; only when the teams can learn, the organisation can learn.
5. Systems thinking  
The fifth discipline, systems thinking, interconnects the other disciplines: team learning, mental models, shared vision and personal mastery. This results in a fully integrated system. System learning stands for seeing interconnections and seeing change processes in time (instead of random indications). From these helicopter positions, actions and organisation processes can be reviewed to reinforce or reduce them. Due to the coherence between all activities and processes, everyone is responsible for the problems that occur within the system. Problems can be solved through incorporating new insights in the system, resulting in a learning system.

*Coenraad van Houten (adult learning) – contemporary Dutch social pedagogue, situated in the school of anthroposophy*

Adult learning is a separate discipline. Somehow adult learning differs from the way children and youngsters learn. Important concepts in adult learning are autonomy, ownership of own learning process, learning how to learn, and lifelong learning. It is striking to see that these concepts receive increasing interest in regular youth education. 'How do adults learn?' is a question Coenraad van Houten works on in his book *Awakening the Will*. In the first part of the book he describes several 'principles' that need attention in adult learning:

- The two main aims in adult learning are *awakening the will to learn and developing independent judgement*. Awakening the will means overcoming resistances, making an effort to learn by supporting three natural drives of every human being. The drive for knowledge, the drive for development and the drive for improvement. Supporting the learning means facing the question of how to awaken these three drives.
- Learning is working on a threefold barrier: the thinking barrier, the feeling barrier and the will barrier. We are 'whole persons' and want to be treated as whole persons, also in learning.
- Adult learning includes what he calls destiny learning and spiritual learning. Mostly we connect the term 'learning' to earthly learning, meaning learning in a structured situation, a school, a course, a setting with a teacher in front. Earthly learning has a consciously given learning objective. However, most of people's learning takes place just 'in life', without a structure, objective or teacher. Our life and destiny confronts us with challenges from which we gain new insights, attitudes and skills. A third area of learning is the inner spiritual schooling path. This has a connection with the drives for learning, the drives for living, the resources we find for going on, the forces we need in order to mobilise our will. The soul is the place where this learning takes place. All these three ways of learning need space and attention, need conscious reflection and awareness to enable learning as a whole person.
- In adult learning the education course is (or should be) based on a definite image of the human being. "Concerning adult education, however, the point is to shape all processes in such a way that they will make it possible for the relevant image of the human being to become alive in the participant" (van Houten (1995) p36).
- The adult learning processes can be described in comparison with the seven life processes (breathing, warming, nourishing, secreting, maintaining, growing, and reproducing). These processes have their specific didactic aspects.

He is also a staunch defender of 'the marriage of art and science in adult learning' and he has his own specific view on this issue.

*Michael Fullan – contemporary Canadian sociologist, specialised in educational innovation; he advised Canadian, British and Dutch government in Educational policy and renewal*

System Thinkers in Action. With this work Fullan contributes to broaden the fifth discipline of Senge by putting the learning organisation in its context, in society. Together with the concept of moral goals the question arises: what is the added value of your organisation for its community / society? Fullan doesn't mean the direct beneficiaries, but the wider society. In his work he is mainly focused on the educational sector. So for a school the direct beneficiaries are the children and their parents. But the question is: what is your added value for your village, your region, your nation?

*Ben Ramalingam – contemporary British researcher in the development sector*

Ramalingam's (2005) work made a comprehensive analysis of lessons from the implementation of knowledge and learning strategies in 13 development organisations (covering both public agencies and NGOs). Between several worthy findings it is interesting to read the answer to the issue: "how is knowledge and learning understood and applied by these organisations?":

- There is a tendency to recognise internal, 'value-generating', forms of knowledge (i.e. the expertise that enables organisations to achieve their goals).
- Most, if not all, organisations see knowledge as an asset, and learning as a practice that contributes to the use and expansion of this asset.
- The widespread and tangible outputs of knowledge and learning work tend, thus far, to be based on improved information systems, rather than improved processes or changed behaviours.
- Organisations which focus the larger part of their knowledge and learning efforts on the human dimensions were in the clear minority.

- The organisational changes called for in knowledge and learning strategies have not in general been facilitated with a systematic, evidence-based approach. Instead, knowledge and learning is dealt with as a menu or toolbox – one which is available for application by staff, but which is more supply-led than demand-driven.
- Although all the organisations place great value on informal sharing and learning activities, these were not generally seen to be within the remit of the organisation’s knowledge strategies.

*Bruce Britton – contemporary British independent consultant in organisational development and organisational learning in the development sector*

Britton (1998) distinguishes eight key functions for learning NGOs:

1. Creating a supporting culture
2. Gathering internal experience
3. Access to information from outside the organisation
4. Communication systems
5. Mechanisms for drawing conclusions
6. Developing an organisational memory
7. Integrating learning into strategy and policy
8. Applying the lessons learned

In this work (1998) he seems to use a kind of ‘technical approach’ to organisational learning, giving a questionnaire to ‘measure’ these functions in your organisation. This is a bit different in one of his later papers (2005) where he focuses more on motives, means and opportunity as the subtitle also expresses. At the same time he has a very practical and concrete way of talking about organisational learning as is shown in the table about ‘Developing a strategy for organisational learning’ (p37, 38). In his concluding remarks he mentions as challenges:

- “Learning in organisations is both deeply personal and strongly influenced by socio-cultural factors. It is easy for donor organisations to assume that Western conceptual models that describe the management and organisational functioning of NGOs are universally applicable. However, a number of recent studies demonstrate the need to challenge the complacent assumption that Western models of management and organisation are equally applicable to NGOs no matter where they are located culturally or geographically. (.....) Many writers on organisational learning (including this author) have made similar assumptions about the universal applicability of Western conceptual models about knowledge and learning – both individual and collective – and have therefore overlooked not only the cultural dimension of learning but also the importance of power relations in shaping the purpose as well as the process of learning in NGOs. This is deeply ironic for ‘the development field has its own traditions to draw upon – such as popular and adult education – that see learning, in part, as a process of revealing and transforming power relations. Paulo Freire’s widely influential approach to literacy saw personal and collective critical reflection as instrumental to the process of social change’ (Chambers and Pettit 2004). The potential for organisational learning to have an equally significant effect on organisational transformation has yet to be fully explored but could potentially bring about genuine shifts in the balance of power in North–South NGO partnership relationships” (p38, 39).
- “There continues to be a significant appetite amongst NGO staff for practical examples of how to translate theory into practice. Associated with this is the need to measure the impact these practices have on organisational capacity and effectiveness” (p39).

*Allan Kaplan – contemporary organisation development consultant since the mid-1980s, specialising in working with NGOs and community-based organisations across Southern and East Africa, as well as in Europe. His ideas are strongly connected to Anthroposophy*

Kaplan is the author of *The Development Practitioners' Handbook* (Pluto, 1996). He focuses on social transformation and social change. Development is not a technical operation that can easily be structured and planned in a logical, linear framework. Chaos, creativity, intuition, relationship building: these are all areas belonging to the complexity of social change.

*Frank Julie – an independent organisational development and transformation consultant. He has been involved in development work for the past 26 years as an activist and organiser in various student-, youth-, civic- and political formations around South and Southern Africa.*

In his paper, *A critique of the learning organisation as espoused by Peter Senge (2006)*, Julie argues that reflexivity and learning cannot be separated from context, purpose or politics. This, he argues, is the fundamental weakness, not only of Senge's work – but of the literature on learning organisations on the whole. Learning is not politically neutral – nor is the mode of learning. These are fuelled by the economic, cultural and political context. For example, he points out that the concepts of 'learning organisation' and of a 'knowledge economy' have emerged out of globalisation – a phenomenon he quotes Neil Newman (2001) as viewing "...as a strategy by employers and represents an attack on labour, not a natural process within which employers could form a partnership with labour for sustainable growth." The learning organisation cannot be viewed in isolation from the global reorganisation, the intention of which has nothing to do with liberating workers and everything to do with profit maximization at their detriment.

Learning is not simply an abstract mental process, another emphasis he accuses Senge of, but a social process where social and economic relations and collaborative sense-making are key – as is the impact on broader society. "Learning to learn and reflexivity are competencies towards a particular purpose." Julie argues that a real learning organisation is not only "internally focused but also focuses on its impact in the broader society with the full awareness of the dominant power relations that seek to perpetuate domination and control."

*James Taylor – a developmental practitioner and director at the CDRA, who has written on the fields of social development and learning, based on his experience with colleagues, community based organisations, non-governmental organisations and international aid agencies since 1976.*

In his latest contribution on learning, *Lost in Knowledge (2010)*, Taylor explores the question "what is the relationship between knowledge, consciousness, and change?"

This question was triggered by the acknowledgment that feelings may well play a more significant role in changing behaviour than knowledge and thinking do. Taylor is concerned that the current preoccupation with learning, knowledge and knowledge management may well serve 'projectable' and 'emergent change', but that it falls short of leading to real transformative change. His question leads him to look more closely at the concept of 'consciousness' and thus to the work of Steve Biko and Paulo Freire. Although the paper poses more questions than answers, of this Taylor is certain: "...inner personal work at the level of consciousness is an essential part of what is required to change the system (along with collective forms of resistance)" (pg2).

## 4. Individual learning

This section touches on the relationship between individual and organisational learning, then focuses on what is especially important in individual adult learning.

### 4.1 Individual learning and the organisation

“Gareth Morgan, in his book ‘Images of Organization’ (1986) points out that organisations cannot, themselves, learn; it is the individuals within them who learn. However, there is more to a learning organisation than simply a collection of individuals who are learning. Swieringa and Wierdsma (1992) define organisational learning as ‘the changing of organisational behaviour’ which occurs through a *collective* learning process. They point out that an organisation can only learn because its individual members learn. ‘Without individual learning there can be no question of organisational learning. On the other hand, an organisation has not automatically learned when individuals within it have learned something. Individual learning is a *necessary* but not a *sufficient* condition for organisational learning’ (1992, p33).” (Quoted from Britton 1998).

### 4.2 Forms and levels of learning

#### *Four forms of learning*

John Heron (1999) talks about a revolution in higher and adult learning, both formal and informal. The crux of this revolution is that learning is now understood as self directed; the primary responsibility no longer lies with the teacher or facilitator, but with the learner. Heron describes learning as having four distinct, yet interdependent forms which inform, support and enhance each other.

- Practical learning is learning how to do something and is manifest in the competent practice of that skill. This is the will, including the physical, level of learning.
- Conceptual learning is learning about something and is expressed in statements and propositions. This is the intellectual, verbal, conceptual level of learning.
- Imaginal learning is the intuitive grasp of a whole. It is expressed creatively in inter-alia shape, colour, movement or sound. This is the imaginative, intuitive level of learning.
- Experiential learning is learning by direct encounter, by being there, face-to-face with a person, at the event or in the experience. This is the feeling, resonance level of learning.

“We encounter the world (experiential learning); identify patterns of form and process in it (imaginal learning); these become the basis for the development of language and knowledge (conceptual learning) which is applied in a wide range of skills (practical learning).” (1999 p4) Heron presents these four forms in an upward hierarchy with experiential learning as the foundation for all the other forms of learning. He goes on to refer to the whole hierarchy as experiential learning.

Beth Jandernoa of the Presencing Institute, puts it a little differently. The four levels of learning she talks about are to (i) do, (ii) think, (iii) see and (iv) feel that which we couldn’t before. Within this she makes a distinction between capacity learning and identity learning – change in how I see the world and how I see myself.

#### *Levels of learning*

Apart from the different forms of learning we come across in the literature, there are also ‘levels of learning’ referred to as single loop and double loop learning. This concept is based on Argyris and Schon. “Single loop learning is like a thermostat that learns when it is too hot or too cold and turns the heat on or off. The

thermostat can perform this task because it can receive information (the temperature of the room) and take corrective action. Double-loop learning occurs when error is detected and corrected in ways that involve the modification of an organization's underlying norms, policies and objectives" (Argyris and Schön, 1978: 2-3; cited by Pasteur, 2004, p15).

Wierdsma and Swieringa distinguish three levels of learning in their model of collective learning. (Source: [http://www.markensteijn.com/lerende\\_organisatie.htm](http://www.markensteijn.com/lerende_organisatie.htm) last opened 22-03-2010)

	<i>Domain of learning</i>	<i>Category of learning</i>	<i>Result of learning</i>
<i>Single-loop learning</i>	Rules	to must/may	Improve
<i>Double-loop learning</i>	Insights	to know/understand	Innovate
<i>Triple-loop learning</i>	Principles	to dare/will/be	Develop

The third level of learning is particularly connected with Senge's principle of mental models. This model suggests that on the level of triple-loop learning development takes place. If so, it is clearly worthwhile to strive for this level of learning in development sector learning processes.

### *Experiential Learning*

Experiential learning is not new. It has a long lineage, and according to Beard (2008) dates back to Confucian philosophy (AD 551 – 179) with the saying; 'I hear I forget, I see I remember, I do I understand.' There are now many definitions and models of experiential learning, but they all have the characteristic feature of placing the learner at the centre of the learning process, responsible for making sense of his/her own experiences and for testing or applying these ideas in practice and checking for soundness in conversation with others. Common across all models of experiential learning is an iterative cycle of experience, reflection, making sense and application. In other words, an experience, which is reflected on, is analysed and turned into new learning which in turn becomes guidelines for action and new experience.

Lee Andresen (undated) describes the three key dimensions of experiential learning:

- The outside dimension – being outdoors or as close as possible to the world of events and phenomena. Promoting direct perception of the world and first-hand reflection (disciplined thoughtfulness) on what I have perceived.
- The communal dimension – engaging with others is fundamental to learning, whether the other is teacher, facilitator or peer – there must be some form of dialogue and interaction.
- The whole person dimension – valuing the inseparable wholeness of the human being.

Viewing research as a tool for learning, Peter Reason (2001) expands on the communal dimension with his idea of 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> person action research.

- 1<sup>st</sup> person – refers to individual self-reflection
- 2<sup>nd</sup> person – refers to the communal or social aspect of learning and specifically to 'face-to-face' inquiry and learning processes
- 3<sup>rd</sup> person – refers to learning within larger systems, beyond those you are able to meet face-to-face. He sees 3<sup>rd</sup> person research as the new edge of learning.

These three dimensions can be linked to the areas of Human Resource Development (individual learning), Organisational Development (organisational learning) and Institutional Development (chain and sector learning).

## 4.3 Individual and cultural differences in learning

### *Learning styles*

Kolb is often used and cited because of his four-stage cycle of experiential learning.

1. Concrete Experience - (CE)
2. Reflective Observation - (RO)
3. Abstract Conceptualization - (AC)
4. Active Experimentation - (AE)

It is also used, though less frequently, for looking at the different preferences individual people have about where they enter the cycle at the outset of their learning. This preference defines the person's learning style. One can find his/her own style using a questionnaire.

These styles are named:

<i>according to Kolb</i>	<i>according to the assessment</i>
Diverging (CE/RO)	Reflectors
Assimilating (AC/RO)	Theorists
Converging (AC/AE)	Pragmatists
Accommodating (CE/AE)	Activists

Another interesting model about how people differ, especially in the way they process information and communicate (i.e. learn) is given by Sandra Seagal and David Horne. In their book *Human Dynamics, a new framework for understanding people and realizing the potential in our organizations*, they refer to three principles that are present in each human being. They call these principles the mental (rational, thinking) principle, the emotional (sensitive, relational) principle and the physical (practical, acting) principle. Each person has one principle that is dominant and which relates to the way the environment is experienced and how information is processed.

People with a dominant mental principle process information in sequential, linear and logical ways. People with a dominant emotional principle process information in an associative way. People with a dominant physical principle process information in a systemic way.

### *The cultural aspect of learning*

Psychology is the science that deals with the concept of 'learning'. Cross-cultural psychology primarily occupies itself with seeking out universal values. Intercultural psychology pertains to the meeting between cultures, is practically oriented and uses more qualitative research methods and insights from other disciplines such as cultural anthropology or sociology. To do justice to the diversity of cultures, this collaboration with other sciences is necessary; as well as paying more attention to theories in which social context is a crucial part of the psyche. Such theories can be found in the vygotskyan approach, narrative psychology or social constructivism. From the section on Schools of Thought we have seen that this approach seems most appropriate to the development sector.

The intercultural psychologists Knipscheer and Kleber state that culture does not explain behaviour, but that it is a product of behaviour; culture is learned behaviour.

The suggestion is that the basis of 'how a child develops' and 'how a mind works' is archetypical. This means that the basic processes are the same or at least comparable and independent of culture. This is confirmed by many psychological studies (psychonomics and research about diagnostics and psychological tests). There is no such thing as an 'African intelligence' or 'Asian intelligence' or 'American intelligence' for example.

At the same time: even when you state that culture is learned behaviour, it is clear that this learned behaviour as a collective imprint becomes a power outside the individual. It becomes prescriptive for how to behave, how to feel, how to value and judge and how to learn. Now the research on cultural differences from Geert Hofstede (1980) – a social psychologist – becomes interesting, especially the dimension he calls individualism versus collectivism. In literature about cultural differences in learning this dimension is often referred to.

From the above text it comes clear that there are two perspectives that don't exclude each other, but are two existing polarities. On the one hand is said that basic psychological processes are the same in every human being. On the other hand it is clear that people differ in the way they process information, their preferences of learning style, the habits, patterns, values and so on that belong to their culture. And all these aspects in differentiation are combined. So belonging to the same cultural group doesn't mean people don't differ in their learning styles.

It is important to be aware of the two perspectives in a learning situation. This means that we always have to adapt our learning concepts and methods to the person, the group, the cultural context where we are working. We need to contextualise.

It also means that we should be careful in valuing or judging what we see in another person, group or cultural context through the glasses of our own preferences, values and cultural habits and patterns. So we need to know ourselves and our own cultural patterns and preferences very well and be able to let go if necessary.

Sawadogo (1995) writes in the article 'Training for the African mind' about the passive way of learning that can be seen in some African contexts. In a collectivistic culture very often the pattern exists that a child learns from listening, observing, obeying the adult, a more convergent way of learning; collecting information, reflecting, working towards understanding and towards a concept. In an individualistic culture a more likely pattern is that the individual's learning question leads; using more a divergent way of learning, starting with a question, a thesis, than analysing and finding all the contributing elements. When detecting such a difference in ways of learning there is the risk of concluding that a divergent way of learning is probably not applicable in an African context. This would be an unacceptable generalisation and can never be true. The benefit of seeing this difference is to be aware of valuing passive behaviour in its own context. "Being passive in the African context is a sign that one is wise and has self-control" (Sawadogo (1995 p283).

## 5. Organisational learning

This section looks at frequently asked questions such as: What is organisational learning? How and where did it originate and develop? What is the difference between organisational learning and a learning organisation? It then looks at factors that may inhibit learning and factors which often enhance learning.

### 5.1 Learning organisations and organisational learning

#### Learning organisations

*"I would define the learning organisation as: the organisation which builds and improves its own practice by consciously and continually devising and developing the means to draw learning from its own (and other's) experience." (James Taylor 1998 p1)*

*"Learning organisations are organisations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together." (Peter Senge cited in Mark Smith 2001 p2)*

*"[An] organisation with an ingrained philosophy for anticipating, reacting and responding to change, complexity and uncertainty." (Malhotra, 1996, cited in Pasteur 2004 p11)*

*"A Learning Company is an organisation that facilitates the learning of all its members and continuously transforms itself". (Pedler et. al. 1991: 1, cited in Pastuer 2004 p11)*

While these definitions highlight the positive aspects of organisational learning, Jan Visser (2202) warns that "like schools and the media, learning in organised work environments can fall into the trap of conditioning for conformity" (p2). This calls into question the key purpose of and motivation for organisational learning. Is it about assimilation and integration or is it about supporting people in bringing their quirkiness, their originality and unique contribution to their work? Visser's caution also reinforces the growing awareness that different types of support and learning processes are needed for learning about what is emerging, as opposed to what is already established.

According to Pasteur, Pettit and van Schagen (2006) the concept of organisation learning began in the 1960s and grew to prominence in the 1980s. They argue that while it is generally accepted that organisational learning comes from the corporate world and is based on the belief that learning and knowledge give competitive advantage, its earlier origins in the development world have been eclipsed. For example:

- Freire's work in the 1960s and 1970s focused on transformative learning, connecting adult education with personal empowerment, social liberation and structural change.

- Participatory action research recognises and promotes the value of people creating their own learning and knowledge as fundamental to social change.
- Participatory development methodologies which are characterised by challenging ‘professional’ knowledge by eliciting and respecting local knowledge.

The growth of organisational learning in the development sector contributes important innovative practices and offers a different set of values. Rick Davies (1998) identifies three major contributions from the development sector:

- The learning process approach which emerged to counter the ‘blueprint’ approach to development.
- The ‘new’ approach to monitoring and evaluation of development projects which emphasised organisational learning.
- The growing body of literature on organisational learning in NGOs written by NGO staff.

Learning consultant Philippa Kabali-Kagwa has noticed that learning in corporate organisations tend to focus on issues relating to productivity, while in civil society organisations the focus is on the personal or inner work. The challenge she sees for CSOs is in “getting to the action and manifesting the change.” Pasteur, Pettit and van Schagen (2006) also caution development organisations about the tendency to become too inward looking at the cost of looking both within and outside their organisational boundaries.

Chetley and Vincent (2003) define the development of a learning organisation as an ongoing, systematic process requiring trust and a recognition of the subtlety and complexity of human relations and describe three stages in this process:

- Individuals and teams are encouraged and supported to learn.
- These processes are socialised or institutionalised.
- Learning is at the heart of the organisation, meaning that learning is used to transform and develop the organisation.

### *Organisational learning*

There does not seem to be a clear difference between ‘organisational learning’ and ‘learning organisation’ in the literature. There are too many nuances in the definitions. However ‘organisational learning’ seems to refer to a process and ‘learning organisation’ more to an entity. Pasteur, Pettit and Van Schagen (2006) describe the difference as: ‘organisations learning’ focuses on the inquiry into the ways in which organisations learn while a ‘learning organisation’ describes the characteristics of an organisation which successfully learns.

Krohwinkel-Karlsson (2007) visualises in an interesting scheme the positions of four concepts on the axes process <--> content and conceptual <--> applied.

	Conceptual	Applied
Process	Organisational Learning	Learning Organisation
Content	Organisational Knowledge	Organisational Management

### *Organisational learning and capacity development*

In the definitions of organisational learning the word ‘capacity’ occurs several times. It is about the capacity to create the results the organisation truly desires. The Study Report *Capacity, Change and Performance* (ECDPM 2008) focuses especially on the why-question about capacity. Why does capacity emerge under a range of different conditions? Why do some capacity strategies fail and others succeed? Why do some actors seem to be able to translate capacity into performance, while others struggle to be effective? In the

study and research to find more clarity on these questions they take some steps from capacity to capabilities. Capacity is the emergent combination of individual competencies and collective capabilities that enable a human system to create value. The mindsets, motivations and hopes of individuals remain crucial contributions to capacity, no matter how complex the system. The most obvious contributions at the individual level were those of leaders at all levels. Development is fundamentally about developing the capabilities of people by increasing the options available to them. Collective capabilities enable an organisation to do things and to sustain itself. There are five core capabilities that contribute to the overall capacity of a system or organisation. These are:

1. The core capability to commit and engage  
to encourage mindfulness; to persevere; to aspire; to embed conviction; to take ownership; to be determined
2. The core capability to carry out technical, service delivery and logistical tasks  
to deliver services; for strategic planning and management; for financial management
3. The core capability to relate and attract resources and support  
to earn credibility and legitimacy; to buffer the organisation or system from intrusions; to earn the trust of others, to combine political neutrality and assertive advocacy
4. The core capability to adapt and self-renew  
to improve individual and organisational learning; to foster internal dialogue; to reposition and reconfigure the organisation; to incorporate new ideas; to map out a growth path
5. The core capability to balance diversity and coherence  
to communicate; to build connections; to manage diversity; to manage paradox and tension

The connection of this model to organisational learning is mainly through the fourth point, the capability to adapt and self-renew.

#### *Knowledge Management and Organisational Learning*

Knowledge Management emerged in the 1990s and is concerned with creating, acquiring, capturing, sharing and using knowledge to enhance performance.

Knowledge Management tends to emphasise content and views knowledge as an asset or a resource, which individuals and organisations can acquire. Knowledge Management includes both the theoretical understanding of how knowledge is created and transformed (e.g. from tacit to explicit and vice versa) and the development of systems and processes through which to handle and use it effectively. Knowledge Management staff were typically located within IT departments.

In former days there seemed to be more focus on knowledge, expertise and information systems and less on learning, learners and learning processes in development organisations. This suggests a preference for the Cognitive School of Thought.

This is changing nowadays as witnessed in the study from IDS and KM4Dev Community 'Knowledge management and organizational learning for development' (Pasteur, 2006). Also Jamikov (2008) sees increased attention to organisational learning and situates the start of this in the 1990s. "The capacity of the development sector to learn from past mistakes and the tendency to act in ways often contradictory to research has long been an issue of concern. In recent times, however, changes in development literature, agencies and approaches suggest that reflection and transformation is possible. The debates of the 1990s sparked by the post-development school are slowly influencing the development sector, with the emergence of new approaches to redress previous problems (...) approaches such as organizational learning and inter-organizational communication, that can indicate the extent to which the sector is transforming itself in response to revised development paradigms" (p311, 312).

Knowledge Management itself has developed since its origins, largely in response to the rate of environmental change and the view of organisations as complex systems. It is now primarily understood as a

means to serve an end; information technologies to facilitate learning. Knowledge Management now also recognises learning as a social process as well as the integral connection between learning and knowledge. Furthermore, Knowledge Management in the development sector recognised knowledge as something to be shared (anathema in the private sector) and began to look at knowledge sharing between organisations. In fact the divergence between present day Knowledge Management and Organisational Learning is becoming so blurred, the writers question whether it is still helpful to see them as different disciplines and argue for greater integration between the two.

Weggeman (1997) has fleshed out Knowledge Management in his so-called Knowledge Value Chain. This consists of the following links: gathering information, recording it, managing it, enriching information and turning it into knowledge, unlocking it, followed by the distribution of knowledge. Such a knowledge system contains a *knowledge infrastructure* and (very important) a *knowledge information culture*.

Pasteur (2004) cites Ackoff (1989): "How does organisational learning differ from other similar concepts such as information management and knowledge sharing? Ackoff (1989) identifies a hierarchy stretching from data, through information and knowledge to the pinnacle of wisdom. The distinction between each of these stages is the degree of cognitive processing of raw data or experience, from mere assimilation through memorizing, to transformation into new insight and action" (p 8).

#### *Knowledges*

Tacit knowledge	Implicit knowledge	Explicit knowledge
Data / Information	Knowledge	Understanding / Wisdom
Who, what, where, when	How	Why

"Data and information principally provide answers to "who", "what", "where", and "when" questions. Application of data and information leads to the building of knowledge, or "knowhow". This distinction is similar to that of Nonaka et al (1996) between explicit and tacit knowledge and their differing means of transmission. Explicit knowledge – like Ackoff 's information – is unequivocal and readily observable. As such it is clearly transmittable in formal, systematic language, and therefore can be documented or articulated with relative ease. Tacit knowledge, on the other hand, is often based on experience and skills. Such first hand, experiential knowing is naturally personal and often context-specific. It is much less easy to express, and can only really be transferred through socialisation processes, such as jointly performed tasks, face-to-face discussions, informal meetings, communities of practice etc (Nonaka and Takeuchi, 1995). There has been a considerable increase in interest and investment in these forms of information management and knowledge sharing amongst development NGOs and some bi-laterals and multi-laterals in recent years (King and McGrath, 2002; Hovland, 2003). Ackoff takes his hierarchy two stages further. Firstly, whilst knowledge results in learning which improves efficiency, systematic, ongoing learning and adaptation require a further level of understanding: knowing "why". Understanding is achieved through inquiry, analysis and diagnosis. Finally, wisdom is the pinnacle of the hierarchy. It involves a greater element of evaluation and judgment, and is more greatly influenced by values, ethics, aesthetics and morality, i.e. it takes into account long range as well as short range consequences of any act (op cit). Machine based systems can help share data, information and even knowledge. However, understanding and wisdom require higher order mental faculties to be able to analyse, diagnose and make judgments. These can only be achieved through human psychological and social systems, whether individual or interactive level (op cit)" (Pasteur, 2004, p 8).

## **5.2 What inhibits & what enhances learning?**

### *Barriers to learning*

Carlsson and Wohlgemuth give five main obstructing factors for organisational learning:

“First, the ambiguity and contested nature of the official objectives of development aid constitutes a political constraint that makes it difficult for agencies to determine ‘what really matters’ and to develop a clear and focused sense of mission. Second, the unequal nature of aid relationships, where one party possesses the ‘power of the purse’ is seen to hamper critical dialogue and creating information bias. Third, the internal organisational problems of aid agencies stemming e.g. from the high centralization of management and the narrow definition of job assignments. Fourth, the lack of capacities on the part of aid recipients. Fifth, the allegedly poor quality of knowledge generated by current aid evaluation systems. In spite of these fundamental concerns, the authors note that development cooperation policy and practice has changed considerably in recent decades. The overall conclusion is therefore that learning does take place, but not to the extent that is possible or desirable.” (Krohnwinkel-Karlson, 2007, p 14)

Based on information from Britton (1998) and Berg (2000) Aarnoudse (2009) lists a series of barriers:

- External barriers, like lack of money for learning processes, competition in fundraising results and therefore a focus on success stories, various complex contexts, dependence on donor organisations.
- Barriers with regard to formal evaluations – too many and too bulky, read by few people, regarded as confidential, with little attention on a learning objective, with a lack of long-term studies.
- Internal organisation barriers – an activist culture, learning is seen as a luxury, spending pressure, difference in learning styles, high staff turnover, a hierarchical structure focused on control, obstructed vertical information flows, making mistakes is rejected and penalised, insufficient systems for information flows.

Several mentioned barriers are general but a substantial number are specific to the development sector. When we want to support organisational learning within this sector, we have to pay attention to the main barriers and how to influence these.

### *Learning enhancers*

#### *Defining purpose and values*

In her paper on the essential elements of CDRA’s approach to learning, Hill (2008) states that values are often implicit and assumed. Yet, she argues, it is important to make these explicit, to establish what these are in the context of organisational learning which is essentially about learning in a group in order to stimulate some collective or social change. A clear sense of values and purpose should influence the choice of learning approach, methods and tools. They should also influence the systems and processes within the organisation to ensure consistency between values and systems.

- What is the purpose of learning in the organisation?
- What is the incentive to learn in this organisation?

#### *Being clear about one’s own social change theory and developing a shared understanding of developmental social change*

Understanding how change happens and the ability to see its unique unfolding is a critical part of our work and informs our engagement with our intervention into each group or situation we work with (Reeler). If strengthening social change is part of our learning agenda, then thinking about one’s own experience of change and how it happens (in you and within the world) – in other words, surfacing your ‘theory of change’ – is an important starting point for a learning process as it shapes/influences what we do in practice. If strengthening social change is part of an organisation’s learning agenda, then it is important to develop a shared understanding of developmental social change (Gujit 2007).

### *Developing a living practice*

Parallel to the shifts in understanding of how development happens, is a shift in emphasis from tools and techniques to processes of learning and to the notion of a living practice (Heron, Pasteur, Petit & van Schagen, Guijt, Chetley & Vincent).

“Tools and methods don’t create change; it’s the people who use them that do.”  
(Pasteur, Petit & van Schagen, 2006 p8)

To be effective as facilitators of learning, we need to ‘walk-the-talk’ – to develop a living practice by continually learning and transforming ourselves and the way we work. According to Chetley & Vincent (2003) the focus is not so much on how to do a particular activity better, but on how to continue to learn from (and therefore to improve on) what is being done” (p4). They emphasise focusing on a living practice rather than on tools and techniques.

### *Reflection-in-action*

The emphasis here is on reflection in action. In their model of experiential learning, Boud & Miller (cited in Saddington) suggest two processes – ‘noticing’ and ‘intervening’ – to assist with integrating reflection in action. Noticing is about paying attention to what’s happening inside you while you are in an experience and using this as a focus for reflection. Intervening is what you do about it, “the way in which the learner takes initiative in the event...” (p2). This has interesting implications for both learner and facilitator. In self directed learning the learner is constantly challenged to take more power and responsibility. The more engaged they are, the more ownership they take, the more interesting the learning experience and therefore the more they learn. Noticing and intervening are two ways to enhance this and can be used by facilitators to help learners shift from the kind of passive learning we’ve all been socialised to accept into this kind of proactive learning (Saddington). The facilitator’s responsibility is to look at how she can enable and support empowerment of learners.

### *Working with feelings*

An essential part of reflection and of ‘noticing’ is called ‘attending to feelings’. This in essence requires the person to recognise and work with the emotional content of the experience. Our response to what we hear indicates what is important to us and this in turn indicates a field of potential learning (Hill 2008). Holloway (1999) (cited in *The Integrated Learner*) agrees: “Learning is also most powerful when it has an affective dimension to it (the need to engage with and reflect upon experiences at a personally meaningful level).” In his paper *Lost in Knowledge* (2010), Taylor considers how feelings are often more effective than information and knowledge in prompting transformational change.

### *Working with the will*

According to van Houten (1995), there are three primary ‘drives’ which reside in all human beings and which feed the learning process:

- Drive for knowledge: the continual need to understand ourselves and the world we live in.
- Drive for development: the basic force of our soul which shapes and reshapes us as we grow.
- Drive for improvement: stems from a deep inner sense that things could be done better, that we are on a path, not yet at the destination.

“When adults are learning, their independent will must be involved as well” (van Houten 1999).

### *Sense-making*

We have already established that sense making is both inner activity and social agreement – both individual and collaborative work. Saddington makes another important point and this is about sequence. He argues

that it is imperative not only to begin, but to end with individual sense-making, with what it means to me. This allows for group's meaning to be personalised and internalised. Questions which support this are:

- What do I see now?
- What feels significant to me now?
- What does it mean to me now?
- What will I do now?

### *Relationships*

All the literature stresses the fundamental importance of relationships, integrating the social along with the personal in definitions and explanations for how learning happens. (Visser, Pedler & Aspinwall, Boud & Miller, Senge et al, Taylor, Jonnasen, Guijt Andressen, Chetley & Vincent, Ramaswamy, Reasson et al)

Hill (2008) describes relationships as the “container and spark” for learning. She distinguishes between the importance of relationship with self as well as the importance of relationships with others.

### *Rewarding learning*

Chetley and Vincent (2003) argue that it is human nature to work to what is being measured and therefore important to include how well learning is being done in performance appraisals. Citing a World Bank case study, they argue that a learning culture is not only where learning is valued, but where this is demonstrated by rewarding it.

### *Flexibility and rigour*

It's not about adopting one method or framework and sticking stubbornly to it. It's about mixing, and adapting from the whole basket available to ensure you meet the information and reflection needs, in a way that is appropriate to, yet challenging of capacities and takes the diversity of the group and the context into account (Guijt, Saddington, Chetley & Vincent). Flexibility is also about being open ended and not setting predetermined outcomes for the learning process. Rigour is quite simply about being thorough. About not going through the motions for the sake of it. About testing for soundness with peers and/or literature.

### *Creative processes as stimulant for learning*

“Creative processes help us penetrate the dominance and limitations of ordered, linear left brain thinking (home of logic & the intellect) and into the colourful, chaotic world of the right brain (home of creativity & intuition)” (Hill 2008). Creativity essentially helps set new thought processes in motion – and it is this kind of thinking that leads to innovation. There are many examples of creative processes one can integrate in the learning process such as dance, drama, singing, writing, story telling and working with colour.

### *A model for organisational learning*

The content of this section is based on Chun Wei Choo's book, *The Knowing Organization* (2006).

Choo presents a model of how organisations use information to adapt to external change and to foster internal growth. “The organization that is able to effectively integrate sense making, knowledge creation, and decision making may be described as a knowing organization. (...) By managing information resources and information practices, it is able to:

- Sense and respond to a changing environment, but also shape and influence changes in the environment that are advantageous;
- Extend its base of knowledge and capabilities, but also unlearn old assumptions and beliefs;
- Make decisions that are sometimes rational and sometimes creative in order to meet increasingly complex challenges” (p4).

The *sense-making* process has three steps:

1. In *enactment* people actively construct the information they attend to
2. In *selection* people look at the information they have enacted and try to answer the question 'what is going on here?'
3. In *retention* the products of successful sense-making are retained for future use.

"*Knowledge creation* is achieved through managing the relationship between tacit and explicit knowledge, and through designing social processes that generate new knowledge by converting tacit knowledge into explicit knowledge" (p8).

According to Nonaka and Takeuchi, conversion from tacit to explicit knowledge has four modes: socialization, externalization, combination and internalization.

1. "*Socialization* is a process of acquiring tacit knowledge through sharing experiences. Tacit knowledge is transferred from an experienced person to another person by the two working side by side, sharing the same work and social setting" (p8).
2. "*Externalization* is a process of converting tacit knowledge into explicit concepts through the use of abstractions, metaphors, analogies, or models. (...) Externalization can also be triggered by dialogue or collective reflection" (p9).
3. "*Combination* is a process of creating explicit knowledge by finding and bringing together explicit knowledge from a number of sources. Thus, individuals exchange and combine their explicit knowledge through telephone conversations, meetings, memos, and so on. Existing information in computerized data-bases may be categorized, collated, and sorted in ea number of ways to produce new explicit knowledge" (p9).
4. "*Internalization* is a process of embodying explicit knowledge into tacit knowledge, internalizing the experiences gained through the other modes of knowledge creation into individuals' tacit knowledge bases in the form of shared mental models or work practices. Internalization is facilitated if the knowledge is captured in documents' or conveyed in the form of stories, so that individuals may re-experience indirectly the experience of others" (p9).

*Decision making* in organisations is constrained by the principle of *bounded rationality*: human beings have limited cognitive capacities, possess limited information and are limited through their own values and conceptions. It is important for an organisation to have *decision routines* to facilitating decision making. "In the light of bounded rationality, organizations reduce uncertainty and complexity by specifying decision premises and designing decision routines. In the bounded rationality model, decision behaviour is still rational (with respect to organizational goals), but it is a more prescribed, regulated rationality that is guided by decision premises and routines" (p13).

## 6. The politics of learning and implications for facilitators

This section on issues of power and authority, begins by asking who is responsible for whose learning. It looks at one of the bedrock assumptions in experiential learning and what it all means for the facilitator. This section is drawn from Heron's book *The Complete Facilitator's Handbook* (1999).

*Who is responsible for whose learning?*

Jan Visser (2001) challenges us to rethink the question "who's responsible for whose learning?" While 'pedagogy' applies to children and 'andragogy' to learning by adults, both carry connotations of external control, coming from, as they do, the Greek verb meaning 'to lead'. Of concern to Visser is the assumption that "in order to learn, there needs to be someone who takes control and leads the learner." This is an assumption every learner and facilitator needs to examine for her/himself. The following questions posed by Visser are helpful in doing so:

- What is/should be the role of others in someone's learning?
- To what extent is that role one of 'leading' the learner?
- Who learns in the process of someone leading someone else?
- What other modes of human interaction support learning?

Experiential learning carries with it certain politics. The acknowledged centre of power is the learner herself. It is important for the learner to stand in her own power, to have ownership of and be engaged in the learning process and decisions about content. This power and primary responsibility must be carried by the learner, it rests only secondarily with the facilitator. What does this mean for a facilitator? Heron's definition of a facilitator is straightforward; "a facilitator is a person who has the role of empowering participants to learn in an experiential group" (p1).

In an attempt to look practically at what this means for the facilitator, Heron outlines six dimensions of facilitation, six different basic, but overlapping issues in which the facilitator can influence the learning process and three modes of facilitation, the different ways in which the facilitator can handle decision-making and deal with power issues within each of the six dimensions.

The six dimension of facilitation include:

1. Planning: This refers to the aims of the group and programme it should undertake to fulfil them.
2. Meaning: This has to do with the group making sense of the experience.
3. Confronting: This is about raising consciousness about the group's resistances to and avoidances of things it needs to deal with.
4. Feeling: This has to do with the containment and processing of feeling and emotion within the group.
5. Structuring: This has to do with method, the shape and form learning is given in the group.
6. Valuing: This has to do with the integrity of the group and with valuing each of its members. It is about creating a container within the group.

The three modes of facilitation are:

1. The hierarchical mode. The facilitator takes full responsibility for all the dimensions. She directs, thinks and acts on behalf of the group. She decides on objectives and on programme. She analyses and makes sense. She maintains control and defies resistance.

2. The co-operative mode. The facilitator shares her power and works with the different dimensions with the group. She enables and helps the group to become more self-directing. Everything is negotiated.
3. The autonomous mode. The facilitator does not do with or for the group but respects their autonomy and creates the freedom for them to find their own way. "It is the subtle art of creating conditions within which people can exercise full determination in their learning."

Clearly different modes of facilitation are appropriate at different times. The facilitator's role includes then an accurate reading of himself and of the group to determine the best stance within each context, dimension, and phase of group development.

#### *Phases of group development: Heron's four seasons analogy*

The first season in a group's life is usually winter time: the weather is cold, overcast and may even be stormy. Trust is low and anxiety is high. Then winter gives way to spring time, a season characterised by budding opportunity. Trust is building, the group is forming its own culture and anxiety drops. Summer time is rich with growth and change, the sun is warm and the sky is open. There is an openness to self and others, and to risk taking, together with a commitment to working. Lastly, autumn comes – a time of harvesting and of giving thanks. The workers go their way.

#### *Facilitator's authority*

Heron outlines three forms of authority. There is the kind that comes with the accumulation of experience, knowledge and skill in a particular area, there is the authority that comes by virtue of their presence, style and manner, and there is a political authority that comes with making decisions about the objectives, programme, methods and assessment of learning. Why do facilitators need authority at all? To pass on their knowledge and skills. Otherwise everyone would have to learn everything from scratch. The biggest tension facilitators have to handle in experiential, or adult, learning is the tension between this passing-on and the self-generative nature of learning.

The teaching of content is important as well, both to educate the feeling life and to discipline the will life" (Coenraad van Houten, 1999).

#### *Facilitator's style*

"Every style is a style. Find your own and be true to it. That's when you're powerful as a facilitator" says Kabali Kagwa. Don't try to mimic anyone else. "The style is the person" says Heron, "It is not acquired or created". It comes largely from your values, your own personal mastery and inner work, as well as from training and professional development.

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